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# ESTIMATING THE DEMAND FOR UNION-LED LEARNING IN SCOTLAND

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*\*These views are written in a personal capacity and are not attributable to any organisation by which the authors are employed or of which they are members.*

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## EXECUTIVE SUMMARY

Since 2000, the Scottish Union Learning Fund (SULF) has provided significant public funding for unions to generate workplace learning programmes and projects. Through SULF, the Scottish Executive provides funds to unions to encourage workplace learning, and thus contribute to the Executive's lifelong learning strategy and to the development of a smart, successful Scotland. The most recent evaluation of SULF to date (Findlay et al, 2006) identified benefits to workers, unions, employers and government arising from union-led learning.

In 2004-5, STUC commissioned a feasibility study to “... *explore the potential for a new organisation that would provide learning opportunities for working people through their trade unions*”<sup>1</sup>. The stakeholder consultation undertaken as part of the feasibility study concluded that there was potential for a union academy to contribute to improving the take-up of lifelong learning and skills development opportunities, but that “*the overall demand for union supported learning across all unions and members is not known*”.

In 2006, STUC commissioned the first systematic research on estimating demand for union-led learning. The research reported here provides robust indicators of demand for union-led learning in Scotland derived from a review of the existing literature, a telephone survey of 750 workers in establishments with a union presence, a postal survey of union learning representatives, and a postal survey of union officers. The data was then used to estimate an econometric model of intention to undertake learning.

More than one third of those surveyed (35%) said they intended to undertake learning at some time in the future. This equates to 400,000 of the relevant population (i.e. those working in establishments with a union presence). A further 21% answered possibly or maybe, with nearly 75% of this group reporting plans to undertake learning in the next 2-3 years. Of those interested in learning, 43% wished to do so in order to progress in their

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<sup>1</sup> York Consulting, 2005

present job, 32% wished to do so for their own career/personal development, and around 15% for their own personal interest or enjoyment.

Respondents indicated interest in a wide range of learning areas including IT; health, medical or care related skills; further qualifications, management/customer services skills; craft skills; financial, accounting and legal skills and hospitality skills

A very clear and striking result of the survey is that when identifying factors that would increase the likelihood of undertaking learning, respondents rated the following factors highly: advice from someone at work (60.3%); encouragement from someone at work (65.1%); learning organised through a trade union (51.9%) and learning organised at the workplace (67.7%).

The other factors related to a desire to learn were having some qualifications already, working in the public sector and being under 50.

Of those who expressed an interest in learning, 50.2% were currently earning less than £24,000 per annum, the national average at the time of the survey. People earning less than average income make up 63.9% of those who said that they may undertake learning in the future.

An econometric model of intention to undertake learning was estimated from the survey data. The strongest (and most statistically significant) effect is that of being positively encouraged by TU provision. Individuals who say that they are more likely to take up learning if it is provided through their union, are 2.48 times more likely to say they intend to learn than those who do not.

Another characteristic which makes an individual more likely to wish to take up a learning opportunity is the provision of advice, encouragement and support within the workplace. This would provide evidence for the view that the provision of union-led learning can, to a considerable degree, create its own demand.

The model also suggests that workers in temporary employment are more likely than those in permanent employment to want to undertake learning.

Perhaps the most significant finding from the survey of ULRs is their perception that there is significant latent demand for learning in their workplaces. On the basis of a mean estimate of 61 learners per ULR and the number of ULRs in Scotland, there should be confidence that a target number of 50,000 over ten years (including learners involved in trade union learning) is achievable.

These new learners are, from the ULR responses, likely to be drawn from all occupational categories and to be engaged in all types of learning. They will include both men and women workers, workers in the youngest and oldest age groups, ethnic minority and migrant workers. However, the ULR survey does highlight the fact that while it appears that temporary workers are more likely than others to want to learn, they are not currently taking up learning opportunities in significant numbers. Taken together with the survey data, this evidence suggests that it is a supply problem to this group of workers rather than a lack of demand, which explains their lack of participation in learning opportunities.

There are currently more than 2200 people involved in union education in Scotland, although there are good reasons to believe that this figure is an underestimate both of actual education activity and of demand for union education. A majority of union officers believe that this demand is likely to rise in the next few years for a variety of reasons relating to strategic union factors, both internal and external. Most believed that, with additional resources, they could deliver many more learners.

While union officers were largely positive in their assessment of the availability, quality and cost of available union education in Scotland, they also identified the potential to expand union education and the role of closer collaboration of unions in both generating and responding to such an expansion.

The evidence contained here is the first comprehensive and formal statistical analysis of demand for union-led learning in Scotland or the UK. A high degree of consistency of outcome resulted from each of the data sources used. This provides reliable evidence that there is considerable current demand and latent demand for union-led learning in Scotland, and that increased union activity in this area is likely to further stimulate demand. Any expansion of union-led learning would, of course, place additional learning demands on ULRs and would highlight further the need for them to be appropriately supported by unions and employers.



## **CHAPTER ONE      BACKGROUND**

### **UNION LED LEARNING, INCLUDING TRADE UNION EDUCATION, IN SCOTLAND**

- 1.1 Trade unions have a long history of involvement in learning activities, dating back to the late 19<sup>th</sup> Century. The establishment of the TUC Training College in 1957 heralded a significant expansion of learning and training activities for trade union representatives, with such activities being further stimulated by legislative developments thereafter. This expansion has also been assisted by the provision of public funding for TUC approved courses in the 1970s and 1980s, and from 2002 to the present.
- 1.2 While most unions have long provided learning opportunities for their officers, representatives and sometimes for their activists, some also have considerable experience in the provision of lifelong learning opportunities for their members (for example, UNISON's *Return to Learn* project and the SPFA's *Education Trust*).
- 1.3 More recently, there has been considerable expansion in the numbers of unions who make learning services available to a wider group of members. These activities have been both a response to, and a driver of, public funding for union-led learning activities. The Union Learning Fund (ULF), established in England and Wales in 1998, and the Scottish Union Learning Fund (SULF), established in 2000, provide significant public funding for unions to generate workplace learning programmes and projects. In their early stages, both funds have supported the recruitment, training and development of Union Learning Representatives (ULRs).
- 1.4 Through SULF, funds are provided by the Scottish Executive to unions to encourage workplace learning, in order to contribute to the Executive's lifelong

learning strategy and to the development of a smart, successful Scotland<sup>2</sup>. The lifelong learning strategy seeks to offer everyone in Scotland the chance to learn irrespective of background and personal circumstances. Its purpose is to enhance personal fulfilment, employability, active citizenship and social inclusion. Skills, education and workforce development are key aspects of this strategy. Learning can be both job-related and non-job-related: contributing to employability but also personal fulfilment.

- 1.5 The evaluations carried out to date of both ULF and SULF have been extremely positive<sup>3</sup>. A recent evaluation of all rounds of SULF to date (Findlay et al, 2006) identified benefits to workers, unions, employers and government arising from union-led learning. Workers have benefited through enhancing both their technical and personal skills and qualifications, with positive consequences for employability. While there remain concerns over the extent to which public funded learning initiatives have focused on a narrow employers' agenda in terms of skills and learning<sup>4</sup>, unions have benefited in terms of greater (and more positive) exposure, developing new internal capabilities and attracting new members and activists, all of which have implications for union renewal and revitalisation.<sup>5</sup> For employers, union-led workplace learning has delivered 'soft' performance benefits as well as improved employee relations. Union-led learning has also contributed to important Executive priorities in terms of employability and social inclusion.
- 1.6 There is wide recognition across the policy making community and amongst individual employers of both the importance and the uniqueness of union activities in relation to learning. Unions can overcome barriers to workplace learning in ways not open to government, employers or other agencies and can thus access 'hard to reach' learners. Further, the nature of trust relations prevailing between unions and their members and the influence unions bring to bear on management facilitate

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<sup>2</sup> Scottish Executive, 2005

<sup>3</sup> See Wood and Moore, 2005; and Wallis, Stewart and Greenwood, 2005.

<sup>4</sup> See Shelley, 2005; Forrester, 2004.

<sup>5</sup> See also Munro and Rainbird, 2004.

better learning outcomes<sup>6</sup>. This phenomenon is not solely a feature of publicly funding union-led learning – the positive impact of unions on learning and skills more generally is well documented.<sup>7</sup>

- 1.7 The availability of public funding for union-led workplace learning has driven a number of changes in the priorities, internal organisation and practices of individual unions and union federations. The TUC established unionlearn (formerly referred to as the Union Academy) in 2006 to encourage a “step change” in union involvement in workplace learning, to support unions in all learning activities and to become “the centre of excellence for supporting high quality union-led learning”.<sup>8</sup>
- 1.8 The STUC established its Lifelong Learning Unit in 1999, prior to the first round of SULF funding in 2000. The Unit expanded in 2005 to become the Skills & Lifelong Learning Team at the STUC. The Skills & Lifelong Learning Team now includes in its tasks supporting individual unions’ applications for and monitoring of SULF projects.
- 1.9 In 2004-5, the STUC commissioned a feasibility study to “*..explore the potential for a new organisation that would provide learning opportunities for working people through their trade unions*”.<sup>9</sup> This study, undertaken by York Consulting Ltd, considered the feasibility of establishing a Scottish Union Learning Academy.
- 1.10 The stakeholder consultation undertaken as part of the feasibility study concluded that there was potential for a union academy to contribute to improving the take-up of lifelong learning and skills development opportunity, but that “*the overall demand for union supported learning across all unions and members is not known*”. The feasibility study proceeded on the basis of a goal of 50,000 new

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<sup>6</sup> Findlay, Warhurst, Stewart and Dutton, 2006

<sup>7</sup> TUC, 2005

<sup>8</sup> <http://www.unionlearn.org.uk/about/index.cfm?mins=105>

<sup>9</sup> York Consulting, 2005

learners over 5 years, representing a doubling of the current levels of activity (comprising 2,500 individuals per annum engaged in trade union learning, around 2000 involved in SULF related learning, and an unquantified number of other learning activities within unions).

- 1.11 unionlearn's targets for 2006-07 have been set at 100,000 learners. These figures do not relate to Scotland, but on the basis of relative populations this would suggest an annual target for Scotland of 10,000 learners, which is the same as the goal outlined above. unionlearn also aims to help 250,000 workers into learning by 2010: on the same pro rata assumption, a target of 25,000 workers in Scotland by this time can be arrived at.
- 1.12 The feasibility study concluded that there was a need to clarify and quantify the volume and nature of the demand for union-led learning in order to secure funding for any Academy. It acknowledged that some indicators of this demand might be aspirational.
- 1.13 The current research is a response to this need for more robust indicators of demand for union-led learning in Scotland. From the earliest stage of this research it became clear that there was little precedent in terms of such a study. No study of demand for union-led learning took place prior to the allocation of £4.5m by the DfES to establish unionlearn, and we could uncover no other research on existing demand for union-led learning elsewhere in Britain. (The TUC have commissioned the Open University to undertake a learning survey of employees, which is ongoing, and which will contain a limited number of indicators of demand).<sup>10</sup>
- 1.14 While at one level this appears surprising, given the level of public funding invested in union-led learning, it is clear that trade unions have been able to establish a level of existing and potential demand on the basis of their ongoing learning activities.

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<sup>10</sup> Personal communication, Bert Clough, TUC

Supply has been determined by the availability of resources rather specified levels of demand, and in many areas, demand by unions for the funding of workplace projects has far exceeded supply.<sup>11</sup> It is widely accepted within the union movement that current learning activities represent a small proportion of existing demand for learning.

1.15 The remit of the recent SULF evaluation did not include a systematic measuring of unmet demand for workplace learning. However, the evaluation indicated that SULF projects had both revealed and stimulated “a so far unappreciated large demand for workplace learning” which was not being matched by SULF activities. Further, there was evidence that SULF was acting as a catalyst for learning culture change which was likely to generate further demand as existing learners progressed up a *learning escalator*, and new learners were attracted into learning.

1.16 A number of practical difficulties were identified, however, which have implications for any estimates of demand in this area. ULRs were struggling to cope with the demand for learning, and as a consequence their ability to find time to record engagement with potential learners in a systematic way was affected, as was their ability to follow up expressions of interest.

1.17 While there are examples of research that attempts to measure demand for learning in a variety of contexts (e.g. Bergstrom et al, 1982; Rongen, 1995; Wheelhouse, 2005) the more reliable of these are based on applications processes. This is not open to investigations of workplace learning. The dearth of research into the demand for union-led learning in Scotland and elsewhere has necessitated the development of a framework and approach for such a study that is outlined in the next chapter.

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<sup>11</sup> Personal communication, Elizabeth Killoran, Northern TUC.

## **CHAPTER TWO            METHODS OF EVALUATION**

### **RESEARCH DESIGN**

2.1 The research undertaken here is both quantitative and qualitative. There are a number of potential sources of information on demand for union-led learning – members of the working public who are potential learners, ULRs who have a direct responsibility for workplace learning and union officers, who have a strategic responsibility for union-led learning and trade union education.

### **DATA COLLECTION STAGES**

2.2 Stage 1: Desk research involving a review of existing, relevant secondary material.

Stage 2: Review of existing provision for union education in Scotland.

Stage 3: Telephone survey of 750 people in employment in establishments with any union presence in Scotland.

Stage 4: Postal survey of 200 Union Learning Representatives across Scotland

Stage 5: Postal survey of 39 STUC-affiliated trade unions and a postal survey to the Royal College of Nursing (who are not affiliated to the STUC). This survey was directed to a named union professional/officer with responsibility for union-led learning including union education in Scotland.

2.3 The review of secondary materials focussed on three main areas. Firstly, we considered the academic literature on union-led learning. Secondly, we considered trade union and public policy materials relating to union-led learning. Lastly, the econometrics literature as it pertains to demand for public goods, and learning in particular, was considered.

2.4 The role, remit and activities of TUC Education in Scotland was assessed using publicly available materials and materials issued to us by the TUC Education Officer for Scotland.

- 2.5 Accent Ltd was commissioned to undertake a telephone survey of 750 people. Two eligibility criteria were stipulated: that the potential respondents were employed, and they were employed in an establishment with union members. (To be included, respondents did not have to be trade union members). A number of sampling targets were specified in terms of sex, age and employment group.
- 2.6 The questionnaire was delivered to Accent in electronic format and converted by them into a CATI (computer aided telephone interview) format. A small pilot of 5 telephone interviews was carried out in early October 2006 to check the clarity and flow of the questionnaire, the routing and the likelihood of achieving acceptable hit rates. The final questionnaire, containing 18 closed and 2 open questions, is contained in Annex 1. A cleaned and labelled SPSS data set was delivered to the research team in mid November 2006.
- 2.7 A telephone survey of 750 people in employment in establishments with any union presence in Scotland was undertaken. In this survey (see Annex 1) respondents were asked a variety of questions about their intentions regarding learning. In addition, they were asked a number of questions regarding their employment status, their earnings and their family and personal circumstances. The survey was designed to elicit information for the purposes of identifying which characteristics make learning more likely and what, if any, are the barriers and motivators to learning. There are estimated to be 1,150,000 people employed in organisations in which there is a union presence.<sup>12</sup> The sample, therefore, represents 0.006% of the total population which is in line with many other published work using surveys of this type.<sup>13</sup>
- 2.8 A postal survey of ULRs across Scotland was undertaken. The contact letter and questionnaire are presented at Annexes 2 and 3 respectively. The letter,

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<sup>12</sup> York Consulting (2005)

<sup>13</sup> For example, Bergstrom, T.C., et al (1982) and Rongen, G (1995)

questionnaire and a replied paid envelope were issued to 150 participants at a ULR conference organised by the STUC in Dundee in November 2006. An additional 50 potential respondents were identified from the STUC ULR database and materials were sent to them directly by the STUC. The response rate for the ULR survey was 25%.

- 2.9 A contact letter and postal survey was sent to union officers with responsibility for union learning, including union education, in Scotland in all unions affiliated to the STUC and also to the Royal College of Nurses. This survey was primarily aimed at assessing current and future demand for trade union education in Scotland. A list of STUC affiliates is included in Annex 4. The covering letter and postal questionnaire are included in Annexes 5 and 6 respectively. These materials were distributed directly by the STUC along with a reply paid envelope. An email was sent thereafter to attempt to boost the response rate. Forty questionnaires were sent out with a covering letter. The response rate for union officers/union professionals was 20%.
- 2.10 There is no agreed minimum acceptable response rate for surveys. Recent business surveys have had response rates of 15-20%<sup>14</sup> although it is important to receive a minimum 10% response rate in order to comment on the significance of findings.<sup>15</sup> While both of the directly issued surveys more than meet this criterion, the response rate is somewhat lower than expected, given the nature of the respondents and of the issues under investigation. There are real constraints, however, on ULRs, in particular, in terms of the demands made on their time by their union activities and this may well have affected the response rate.

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<sup>14</sup> Saunders *et al*, 2000.

<sup>15</sup> Saunders *et al*, 2000.



## **CHAPTER THREE      PUBLIC DEMAND FOR LEARNING IN SCOTLAND**

- 3.1 Here the results of the telephone survey of employees in unionised workplaces in Scotland are analysed using a variety of statistical and econometric methods. First, a series of descriptive measures are examined and the key relationships and findings are highlighted. Second, a logit model is estimated which gives us information about the characteristics of employees which make them more or less likely to say they wish to undertake learning now or in the relatively near future.
- 3.2 In terms of the demand for any type of learning now or at some unspecified time in the future, the survey results indicate that almost 35% of our sample says that they do intend to take part in learning. This would equate to just over 400,000 of the relevant population (ie those working in organisations where a trade union is present). In addition, just over 21% of those surveyed gave the answer 'possibly/maybe' when questioned about any intentions to take part in learning. However, when these people were questioned further about when they might consider taking up learning, nearly three quarters of them indicated that they were considering learning within the next 2-3 years at the latest. Only a quarter said they were considering learning in a period beyond 4-5 years. This would suggest that there is considerable variation in the strength of intention or focus of this 'undecided' group.
- 3.3 In terms of the reasons given for learning, there appeared to be a wide variety of factors. However, 43% of those interested in learning indicated that their desire to learn is associated with a desire to progress in their present job. For 32% of these respondents, a desire for learning was related to their own career/personal development. Around 15% wished to undertake learning for their own personal interest or enjoyment.

3.4 The additional areas of learning that respondents identified as of interest to them are listed in descending order of frequency below:

- IT/computing skills
- Further academic study/qualifications (including languages, maths, science and arts)
- Health, medical, care related skills
- Management, customer services, human resources and training related skills
- Craft skills
- Health and Safety training
- Financial, accounting and legal skills
- Hospitality skills
- Physical activity/leisure related skills

3.5 A very clear and striking result of the survey is that when asked about factors which would make respondents more likely to take up learning, the following factors were rated highly; advice from someone at work (60.3%); encouragement from someone at work (65.1%); organised through a trade union (51.9%); organised at the workplace (67.7%).

3.6 Of those who expressed an interest in learning, 50.2% were currently earning less than £24,000 per annum, the national average at the time of the survey. People who earn less than average income make up 63.9% of those who said that they may undertake learning in the future.

3.7 Expectation of future income was also related to the intention to undertake learning. Cross-tabulation analysis reveals that those who answered that they expected to earn more in the future were significantly more likely to say that they intended to take part in learning. Of course, the direction of causation cannot be determined from a cross-tabulation, but one possibility is that those who have ambitions in terms of their career may well also be more likely to undertake learning. Equally

likely is that those who are learning, or who intend to undertake learning, expect to earn more in the future as a result. Either way, it does indicate that a clear relationship is perceived to exist between learning and career, or earnings, progression.

- 3.8 One relationship which was examined was between intentions to learn and the highest level of existing qualification. The results of the cross-tabulations suggest that those with no, or only Level 1 or 2 qualifications (S/NVQ Level 1 and 2), are less likely than expected to say that they intend to learn. Those with Level 3-5 qualifications are more likely than expected to undertake learning. This may suggest that people develop a 'taste' for learning, or it may suggest a lack of confidence in learning from those with little or no experience of obtaining formal qualifications. We will return to this relationship later when we discuss the results of the econometric investigations.
- 3.9 Investigation of a possible relationship between private/public sector employment and the desire to learn reveals that employment in the public sector carries with it a greater than expected tendency towards learning. Again, there are a number of possible explanations for this. It may be that opportunities for learning, or rewards for learning, are greater or more formalised in the public sector.
- 3.10 Investigation of the relationship between age and intentions to learn reveal an increasing relationship up to age 50 and a decline thereafter. Again, this is re-examined in the formal model.
- 3.11 No detailed investigation of the effects of race or ethnic origin on the intention to learn was possible given the nature of the sample, which contained only 4 non-white respondents.
- 3.12 No significant relationship was found between intention to learn and the presence of children or other dependents. This may be less surprising given that the entire

sample are already in employment and therefore have childcare arrangements in place.

3.13 Given the nature of the problem under investigation, it was decided that the most appropriate way to examine the relationship between the declared intention to learn and any identifiable characteristics of the sample respondents, was by way of a logistic regression. Logistic models are part of the class of limited dependent variable models which are used in circumstances where the variable being explained is not continuous but is discrete in character.<sup>16</sup> In the present example, the declaration of an intention to learn is specified as ‘yes’ or ‘no’ i.e. it is binary in character. The logit model provides us with a way of determining the effect of various factors on the log of the odds in favour of a particular individual being a ‘yes’ or a ‘no’ i.e. we can determine which factors increase or decrease the probability of someone having an intention to learn. This is the only known formal statistical investigation of the demand for union-led learning in Scotland (or the UK) but the methods used here are well known, have been used widely, and are appropriate for this purpose.

3.14 For the present purpose, it was decided to reclassify the ‘possible/maybe’ answers as ‘no’. As indicated in section 3.2, there may be good reason to believe that a substantial majority of those who replied ‘possible/maybe’ are actually firmer in their intention to learn than might initially be thought. However, it was decided to take a more cautious approach to the interpretation of the responses to this particular question so as to strengthen the validity of the results.

3.15 After examination of the basic statistical analysis of the data, the following variables were selected as the most important explanatory variables: age (in four banded categories); income (in 4 banded categories); highest existing qualification (in 5 levels); permanent employment; full time employment; a variable to indicate

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<sup>16</sup> J Scott Long , 1997

any disability; having children/dependents; aspiring (i.e. expects to earn more in future); declaring a positive attitude towards TU organisation of learning (TU). The last variable (TU) was chosen as it captures the variables referred to in Section 3.4 (advice and encouragement in the workplace and union provision/organisation of learning) through the network of union learning representatives.

**Table 3.1: Set of Explanatory Variables**

<b>Variable</b>	<b>Default Category</b>
Female	Male
Age 1 (18-24)	Age 3 (35-49)
Age 2 (25-34)	Age 3
Age 4 (50+)	Age 3
Permanent	Temporary
Fulltime	Part-time
TU	Not motivated by TU organisation of learning
Aspirations	Don't expect to earn more in future
Dependents	No children/dependents
Disabled	No disability
Topinc (£40,000 +)	Avginc ((£15,000-£23,999)
Highinc (£24,000 - £39,999)	Avginc
Lowinc (<£15,000)	Avginc
Level 1 S/NVQ	No Qualifications
Level 2 S/NVQ	No Qualifications
Level 3 S/NVQ	No Qualifications
Level 4 S/NVQ	No Qualifications
Level 5 S/NVQ	No Qualifications

3.16 The results of the estimation of the logit model are presented below. The final column indicates the extent to which this factor makes it more or less likely that an individual will say they intend to undertake learning.

**Table 3.2: Results of estimation of the logit model**

	B	Sig.	Exp(B)
Female	.049	.792	1.050
Age1	-.561	.283	.571
Age2	-.069	.741	.933
Age4	-.095	.669	.909
Permanent	-1.075	.011	.341
Fulltime	-.282	.245	.754
TU	.909	.000	2.482
aspirations	.400	.020	1.492
dependents	.061	.737	1.063
Disabled	.304	.381	1.355
topinc	.203	.352	1.226
highinc	.105	.517	1.111
lowinc	-.301	.126	.740
Level1	.335	.400	1.397
Level2	.607	.116	1.835
Level3	1.086	.002	2.961
Level4	.884	.015	2.422
Level5	1.703	.000	5.490
Constant	-.908	.117	.403

3.17 The estimated coefficients of logit models have a slightly different interpretation from regression analysis using continuous variables. However, as the probability of something increases then both the odds and log-odds also increase. From Table 3.2 above we can see that one of the strongest (and most statistically significant) effects is that of being positively encouraged by TU provision. Individuals who display this characteristic are 2.48 times more likely to say they intend to learn than those who do not.

- 3.18 Compared to the 35-49 age group, all age groups are less likely to say they intend to learn (although the results are not significant at the 10% level of significance).
- 3.19 Another significant result is that being in permanent employment reduces the probability that an individual will declare an intention to learn by a factor of 0.341 (i.e. around a third less again) compared to those in temporary employment. There may be a push factor here in that the insecurity of temporary employment might give an incentive to learn in order to obtain permanent employment.
- 3.20 In terms of the declared expectation to earn more in the future, those who have this expectation are 1.49 times more likely to say they intend to take up a learning opportunity.
- 3.21 The results of the 'highest existing qualification' variables are broadly in line with those derived from the basic cross-tabulations (although only those in relation to the top three groups (S/NVQ Levels 3, 4 and 5) are statistically significant). Compared to those with no qualifications, those with Level 3 qualifications are 2.96 times more likely to want to learn. The corresponding figures for Level 4 and 5 are 2.42 and 5.49 respectively.
- 3.22 None of the variables which relate to the existence of dependents (children or adults), the presence of a disability or to income are statistically significant. They are, however, all positive, with the exception of low income groups (who are less likely to want to learn than those with average income).
- 3.23 To summarise, the survey results indicate a considerable degree of demand for learning among the relevant population group i.e. those who work in organisations with a trade union presence. A direct application of the sample to the population would suggest that, over the next 4-5 years, we might expect numbers of around 400,000. It may be prudent to take a more cautious view of these results given the

known problems of the survey method; however, it does seem likely that the numbers are certainly as high, if not considerably higher, than those indicated in the feasibility report produced in 2005.<sup>17</sup> This statement can be made in stronger terms given the results of the other investigations reported in Chapter 4 of this report. Also, as noted earlier, we have completely excluded from this figure those people who answered ‘possibly/maybe’ to the question about whether or not they intended to take part in learning, even though many of them were thinking of doing so within a period of three years. The inclusion of at least some of this group would have increased the estimated number of potential learners in the population still further.

3.24 In addition, there are a number of characteristics which make an individual more likely to wish to take up a learning opportunity. Chief among these is a positive attitude towards the provision/organisation of learning by a trade union. More generally, there is a clear demand for advice, encouragement and support within the workplace. This would provide evidence for the view that the provision of union-led learning can, to a considerable degree, create its own demand.

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<sup>17</sup> York Consulting *op cit*



## CHAPTER FOUR EXISTING AND LATENT DEMAND FOR LEARNING IN UNIONISED WORKPLACES IN SCOTLAND

- 4.1 The material presented here is almost wholly derived from the survey of ULRs described earlier. ULRs, by virtue of their position, location (both geographically and within union structures) and activities are a key source of information in relation to demand for learning in three important regards. Firstly, they have knowledge of current union-led learning activities within Scottish workplaces. Secondly, their direct contact with workers enables them to provide reliable insights into the extent of latent demand for learning, and the factors which would transform latent into actual demand. Thirdly, the activities of ULRs themselves can play a crucial role in stimulating interest in learning and thus generating new demand. A small amount of data included in this chapter is taken from the survey of union officers/union professionals which is discussed fully in Chapter Five.
- 4.2 The questionnaire was delivered to approximately 200 ULRs across Scotland. Fifty useable responses were received, representing a response rate of 25%.

### RESPONDENT'S DETAILS

- 4.3 The ULR respondents were employed in, and operating within, establishments in both the public and private sector, although as Table 4.1 shows, respondents from public sector workplaces were significantly over-represented.

**Table 4.1: The sectoral location of ULR respondents (% , number)**

<b>Sector</b>	<b>%</b>	<b>Number</b>
Private	26	13
Public	72	36
Voluntary	0	0
Private and public	2	1
<b>Total</b>	<b>100</b>	<b>50</b>

- 4.4 In terms of industrial sectors, the largest group (33%) were employed in public administration, defence and social security, closely followed by those in transport, storage and distribution (27%). Just over 12% were employed in the wholesale and retail trade. Around 8% were employed in the education, manufacturing and construction sectors, and 4% in financial intermediation.
- 4.5 Around three quarters of the respondents were employed in organisations employing more than 250 employees, 20% were in organisations employing 51-250 employees, and 4% were in smaller organisations.
- 4.6 While most (58%) were employed in the Central Belt, the remaining ULR respondents spanned Scotland in geographical terms.
- 4.7 Table 4.2 below specifies which trade unions are represented in the sample.

**Table 4.2: ULR respondents by union (% , number)**

<b>Union</b>	<b>%</b>	<b>Number</b>
AMICUS	10	5
ASLEF	4	2
CWU	8	4
EIS	6	3
FBU	6	3
GMB	2	1
PCS	28	14
RMT	8	4
TGWU	2	1
TSSA	8	4
UCATT	4	2
UNISON	2	1
USDAW	12	6
<b>Total</b>	<b>100</b>	<b>50</b>

## CURRENT UNION-LED LEARNING ACTIVITIES

4.8 According to the ULR respondents, 3176 employees in total had taken up union-led learning opportunities since 2000. For individual ULRs, the number of learners ranged from 1 to 500, with a mean of 79 over a 5 year period. Table 4.3 below indicates the relative presence of occupational groups amongst current learners to which these learners belong and the mean proportion of learners represented by each occupational group.

**Table 4.3: Occupational group of current learners**

<b>Occupational group</b>	<b>Mean of total learners made up by this occupational group %</b>	<b>Base (number of ULRs)</b>
Managers and Senior Officials	17	5
Professionals	64	5
Associate Professional and Technical	47	8
Administrative and Secretarial	70	14
Skilled Trades	48	11
Personal Service	1	1
Sales and Customer Service	61	10
Process, Plant and Machine Operatives	72	5
Elementary/unskilled	58	11
Other	2	1

4.9 For just over a third of ULRs, the learner group they represented was measurably balanced by gender, and the remaining ULRs split fairly evenly between those whose learner groups were largely composed of one sex or the other, as indicated below.

**Table 4.4: Gender of current learners**

<b>Gender</b>	<b>Current learners %</b>	<b>Base (number of ULRs)</b>
All female	2	1
Mainly female	27	12
Equal mix of male and female	36	16
Mainly male	27	12
All male	9	4
<b>Total</b>	<b>100</b>	<b>45</b>

- 4.10 Just less than one quarter of the sample (24%) reported that their learner group included ethnic minority workers, while around 8% reported that some were migrant workers.
- 4.11 In terms of age, 38% of ULRs reported the presence of workers aged under 21 in their learner group (a mean of 22.5% of learners), while 70% reported the presence of workers over 50 (a mean of 40% of learners).
- 4.12 The learner groups were dominated by workers on permanent contracts, either full or part time. Temporary workers were largely absent. This is of particular interest given that the telephone survey results indicated that temporary employment status was a strong indicator of desire to learn. There is a clear gap between the level of desire amongst temporary workers to engage in learning and their current involvement in workplace learning. Half of the ULRs reported that many learners were shiftworkers.
- 4.13 The learner groups were fairly evenly split in terms of the types and status of learning undertaken. Just over half (54%) reported that at least half of their learner group had undertaken accredited learning, and 42% reported that their learners had undertaken non-accredited learning. One quarter (26%) reported job related learning, and just over half (54%) reported learning for personal interest or fulfilment.

## FUTURE DEMAND FOR UNION-LED LEARNING

4.14 Just over half of the ULRs were able to estimate the number of employees who wished to undertake union-led learning but had *not yet* done so. This group identified a mean number of 88 prospective learners, with a range from 8 to 800. This figure is significantly higher than for workers currently undertaking learning (mean of 79). If we exclude the highest figure of 800, which was a significant outlier, the mean number of prospective learners is 61. The mode for this question is 30. Each of these figures can be used to estimate the existing demand for learning across the population of ULRs in Scotland. Findlay et al (2006) identified at least 846 ULRs trained as part of SULF projects up to 2005. This figure is used in our analysis, although it is clearly an underestimate, excluding ULRs who have undertaken induction/learning since, and those who have been trained outwith SULF projects (or those who have not been trained at all). Table 4.5 below summarises these calculations:

**Table 4.5: Estimated prospective learners in Scotland**

Measure	Prospective learners	Estimated prospective learners in Scotland [prospective members per ULR multiplied by the number of ULRs (846)]
Mean	88	74,448
Adjusted mean	61	51,606
Mode	30	25,380

There is a strong case for using the adjusted mean as the most reliable estimate of demand for union-led learning in this analysis. The presence of a significant outlier militates against using the unadjusted mean. The concentration of mode responses in one medium sized union detracts from its reliability. On the basis of the adjusted mean, an estimate of current demand for union-led learning (which will exclude a significant number of learners involved in union education) is 51,606. On the basis of these calculations, we are confident that the target set in the Feasibility study for 50,000 new learners over 10 years is realistic.

4.15 ULRs were asked about the direction in which demand for union-led learning was moving. Table 4.6 illustrates their responses, with more than half indicating that such demand was increasing, and only 8% signalling a decrease in demand for union-led learning.

**Table 4.6: Trend in demand for union-led learning as identified by ULRs**

<b>Demand</b>	<b>%</b>
Increasing	52
Staying about the same	40
Decreasing	8
<b>Total</b>	<b>100</b>

4.16 We asked respondents if, *given sufficient resources*, they could double, treble or quadruple the number of union members undertaking union-led learning. The majority (57%) indicated that they could double their current numbers; 24% considered that they could treble their current numbers, and 19% indicated that they could quadruple the number of current learners.

4.17 Union officers/union professionals reinforced the ULR responses, with four out of eight reporting that their union could double the number of learners given sufficient resources, one indicating that the number could be trebled, and three indicating that the current provision could be quadrupled.

4.18 We asked about the composition of the group identified as interested in undertaking learning but having not yet done so. Table 4.7 indicates the estimated mean proportion of each occupational group amongst current and prospective learners as identified by ULRs.

**Table 4.7: Current and prospective learners by occupational group**

<b>Occupational group</b>	<b>Mean estimate of current learners %</b>	<b>Base (number of ULRs)</b>	<b>Mean estimate of prospective learners %</b>	<b>Base (number of ULRs)</b>
Managers and Senior Officials	17	5	17	10
Professionals	64	5	60	9
Associate Professional and Technical	47	8	44	7
Administrative and Secretarial	70	14	49	20
Skilled Trades	48	11	45	11
Personal Service	1	1	5	3
Sales and Customer Service	61	10	70	12
Process, Plant and Machine Operatives	72	5	55	7
Elementary/unskilled	58	11	53	14
Other	2	1	2	1

4.19 It is clear that current union-led learning is attracting employees from across the occupational spectrum. This is not surprising, given the emphasis on lifelong learning in Scotland and in public funding for union-led initiatives. What is striking in the figures is the extent to which highly skilled and qualified employees participate and are predicted to participate further in future union-led learning. In overall terms, however, both current and prospective union learners are drawn from a wide range of occupations.

4.20 ULRs were also asked to consider the gender composition of prospective learners and Table 4.8 compares this to the composition of current learners.

**Table 4.8 Gender composition of current and prospective learners as reported by ULRs**

<b>Gender</b>	<b>Current learners</b>	<b>Prospective learners</b>
	<b>% (ULRs)</b>	<b>% (ULRs)</b>
All female	2	2
Mainly female	27	18
Equal mix of male and female	36	43
Mainly male	27	32
All male	9	5
n	45	44

The data suggests that prospective learner groups are likely to be more evenly gender balanced than current learners.

- 4.21 In terms of the ethnic composition of learners, 36% of ULRs predicted that prospective learners would be drawn from ethnic minority groups, as compared with 24% of ULRs who reported the presence of ethnic minority workers amongst current learners. The mean proportions cited for current and prospective ethnic minority learners were 12.5% and 10.9% respectively.
- 4.22 Twice as many ULRs (16% compared with 8%) predicted that new learners would be drawn from migrant workers as reported the presence of migrant workers amongst current learners.
- 4.23 Table 4.9 below presents the ULR responses on current and prospective learners by age. These groups are of particular interest in terms of their access to learning, skills and qualifications: the under 21s who are in employment are less likely to have undertaken learning after school; while the over 50s are the age group least likely to have undertaken learning in areas such as ICT. Both groups are well represented amongst both current and prospective learners.



**Table 4.9: Age composition of current and prospective learners as reported by ULRs**

Age group	Mean estimate of current learners %	Base (number of ULRs)	Mean estimate of prospective learners %	Base (number of ULRs)
21 and under	38	19	21	26
50 and over	40	35	34	37

4.24 It is clear from the ULR responses that union-led learners are largely drawn from the permanent workforce, either full-time or to a lesser extent part-time. Temporary workers do not feature significantly in ULR reporting of either current learners or prospective learners.

**Table 4.10: Employment status composition of current and prospective learners as reported by ULRs**

Type of employment	Mean estimate of current learners %	Base (number of ULRs)	Mean estimate of prospective learners %	Base (number of ULRs)
Full time permanent	82	38	79	41
Part time permanent	29	20	31	26
Full time temporary	11	2	10	4
Part time temporary	35	3	35	3

4.25 ULRs reported in roughly similar proportions that shift workers would be prospective learners as they did on current learners (52% compared with 50%). Means of 78% for current learners and 84% for prospective learners suggests that shiftworkers are accessing union-led learning, although it should be noted that shiftworking may take a variety of forms and the survey was unspecific on the form of shiftworking.

4.26 ULRs were asked to give some indication of the types of learning that prospective learners might undertake. Table 4.11 below indicates the significance of all forms of learning, accredited and non-accredited, job related and personal interest. In terms of job related courses, significantly more ULRs reported the relevance of this to future than to current learners, although the proportions of learners engaged in this activity were predicted to be lower.

**Table 4.11: Type of learning undertaken as reported by ULRs**

<b>Type of learning</b>	<b>Mean estimate of current learners %</b>	<b>Base (number of ULRs)</b>	<b>Mean estimate of prospective learners %</b>	<b>Base (number of ULRs)</b>
Accredited courses	48	27	44	36
Non-accredited courses	62	21	42	25
Job-related courses	48	18	29	24
Personal interest courses	51	27	39	34

While this appears somewhat contradictory, it is worth noting that interest in job-related learning dominated the telephone survey results.

4.27 ULR respondents were asked to indicate any factors that they believed would help stimulate further union-led learning. Thirty nine ULRs (78%) responded to this question with over half of the ULRs providing at least three comments. Table 4.9 below summarises the areas covered by the 122 comments contained in the survey.

**Table 4.12: Factors stimulating take up of learning as reported by ULRs**

<b>Comment</b>	<b>Number of responses</b>
Employer recognition/time off to learn	31
Access to learning	24
Funding	23
Awareness of learning opportunities	22
ULR recognition	12
More interaction with colleges	2
Increased staff morale	1
Understand new European laws	1
Peer pressure	1
Childcare provision	1
Fun	1
Self belief	1
Help in starting trade councils	1
Rewards for attainment	1

4.28 The most common factors mentioned by respondents included employer recognition of the value of learning and time off to learn. Respondents indicated that further union-led learning would be stimulated if learning was valued more by employers and if there was more cooperation between the employer and union. Other concerns related to the time available to participate in learning. Some respondents felt that in order for this to be achieved there needed to be more flexibility in the workplace in terms of having paid time off to learn as well as ‘shift friendly’ opportunities.

4.29 ‘Access to learning’ issues elicited 24 responses with comments that the availability of courses, particularly at a local level or in more rural locations, was limited and that more online learning opportunities might increase union-led learning. As access is an issue, some suggested that more on-site learning facilities or mobile equipment might also be a solution.

4.30 ‘Awareness of learning’ was also a factor that many respondents raised (n=22). Comments indicated that more publicity and advertising of learning opportunities including examples of the benefits to learning is required, and that this is best done

through a high profile union campaign and through employers marketing the role of the ULR. Some respondents linked this comment to the need for more awareness and recognition of their role particularly in relation to time off to carry out their duties.

- 4.31 A lack of funding was also identified as a factor that hindered take-up of learning. The respondents indicated that the number of learners would be likely to increase if there were more free or discounted courses available.

## **SUMMARY**

- 4.32 Perhaps the most significant finding from the survey of ULRs is their perception that there is significant latent demand for learning in their workplaces. On the basis of a mean estimate of 61 learners per ULR and the number of ULRs in Scotland, there should be confidence that a target number of 50,000 over ten years (including learners involved in trade union learning) is achievable.
- 4.33 These new learners are, from the ULR responses, likely to be drawn from all occupational categories and to be engaged in all types of learning. They will include both men and women workers, workers in the youngest and oldest age groups, ethnic minority and migrant workers.
- 4.34 The results from the econometric analysis of the telephone survey data (see section 3.17) indicate that temporary workers are more likely than permanent workers to express a desire/intent to learn. Yet the data on current learners suggests that temporary workers are not accessing learning in significant numbers. While the relative exclusion of temporary workers from current learning activities may be explicable entirely on the basis of their employment status, it is of some concern that this group of workers' interest in learning is not translating to learning engagement, not least given the likely benefits of enhanced learning for more insecure workers. This would suggest that there may be a problem here in relation to the supply of learning to this group rather than a lack of demand.

## CHAPTER FIVE            DEMAND FOR UNION EDUCATION IN SCOTLAND

### BACKGROUND

- 5.1 Union education refers to the provision of learning services for trade union employees and representatives such as trade union officers/professionals, lay officers, workplace representatives, health and safety representatives and union learning representatives. In Scotland, as elsewhere in Britain, much of this is organised through TUC Education, now encapsulated within unionlearn (formerly the Union Academy), either in terms of generic programmes for trade unionists or tailored programmes for particular trade unions.
- 5.2 In Britain, over 70,000 trade unionists take part in union education activities each year, aimed at building their capacity to understand union policies and priorities, address current workplace and wider social issues, and hence enhance their performance as union employees and/or union representatives within workplaces.<sup>18</sup> As well as furthering union activities, trade union education plays a significant role in engaging and enhancing the skills and qualifications of a wide range of learners, including many non-traditional learners.<sup>19</sup> These learning activities have knock on effects in personal/domestic, community and political activities.<sup>20</sup>
- 5.3 Since 1996, the TUC Union Representatives Programme has been accredited through the National Open College Network.<sup>21</sup> Current TUC education has at its core union representatives training (Stage 1, Stepping Up, Level 3 Certificate), Health and Safety representatives training (Stage 1, Next Steps and Level 3 Certificate), and Union Learning Representatives training (Initial Training, Additional Modules, Level 3 Award). In addition, TUC Education provides a

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<sup>18</sup> <http://www.unionlearn.org.uk/education/learn-77-f0.cfm>

<sup>19</sup> Capizzi, 1999

<sup>20</sup> Findlay and McKinlay, 2002.

<sup>21</sup> Capizzi, *op cit.*

variety of specialist and short courses (See Table 5.2 below).

- 5.4 Unionlearn's strategic priorities identify a number of areas in which further union education and learning activities are likely, including new on-line learning opportunities, strategic management and leadership training for unions, CPD for union professionals, networks to support union representatives and ULRs in particular, and learning around equalities issues, community cohesion and European and international developments.
- 5.5 In addition to TUC Education, many trade unions have their own education services, with a wide range in terms of the scale of provision. It is much more difficult to ascertain the level of this kind of education activity. Surveys can give some indication of scale: in one survey by the University of North London, out of 35 TUC affiliated unions who responded, 30 ran their own courses, with 10 of these training over 1000 trade unionists each year.<sup>22</sup>

## **TRADE UNION EDUCATION IN SCOTLAND**

- 5.6 In 2005, 2262 students took part in union education activities in Scotland organised through TUC Education. These activities are free to the learners. The costs of this provision are borne by the Scottish Executive, the Scottish Funding Council and the TUC Educational Trust, with unions paying some of the learners' expenses. The quality of provision of union education in terms of learning and teaching processes, learner progress and learner outcomes has been highlighted in recent HMIe reports.<sup>23</sup>
- 5.7 Table 5.1 below illustrates the numbers of people involved in TUC provided union education in Scotland since 2000. It is estimated that this rate of learning is rising

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<sup>22</sup> <http://www.eiro.eurofound.eu.int/2002/07feature/uk0207104f.html>

<sup>23</sup> HMIe, 2007. Available at <http://www.hmie.gov.uk/documents/inspection/StowCollRep.pdf>

by 8-10% per annum, a rate of increase which is lower than for Britain as a whole,<sup>24</sup> where course enrolments are rising by around 13%.<sup>25</sup> This gives a current figure for 2006 of just under 2500. However, this is likely to be an under-estimate of both the current and latent levels of demand for union education. It under-estimates current demand as it excludes provision by unions themselves outside of the auspices of TUC Education. It is also likely that actual demand and latent demand are likely to differ because of the impact of supply restrictions on actual demand – put more simply, more union activists would be involved in union education if there were more resources to provide it. According to the TUC’s Education Officer in Scotland, current provision for union education is not touching the tip of the iceberg.

**Table 5.1: Numbers involved in union education through TUC Education in Scotland, 2005 and previous 5 years.**

Union workplace representatives: Students										
	Union officials		Safety reps		ULR	ULR modules	Specialist courses	Short Courses	Certified courses	Total
	Stage 1	Stage 2	Stage 1	Stage 2						
2005	161	68	266	89	195	39	--	151	393	2262
2004	240	46	406	183	253	74	--	774	94	2070
2003	228	30	347	239	330	--	48	834	--	2056
2002	198	20	368	133	185	--	--	1031	--	1935
2001	259	84	416	190	6	--	--	1013	--	1968
2000	258	39	429	136	--	--	473	539	--	1874

Table 5.1 also indicates the main foci of union education activities. Table 5.2 below gives further specification of the kinds of areas addressed in short or specialist courses.

<sup>24</sup> Interview with Harry Cunningham, TUC Education.

<sup>25</sup> <http://www.unionlearn.org.uk/about/index/cfm?mins=107>

**Table 5.2: Types of Short Courses provided by TUC Education in Scotland**

<ul style="list-style-type: none"><li>• Union Learning Reps</li><li>• ULR Workforce Development Module</li><li>• ULR Basic Skills Module</li><li>• ULR E-learning &amp; learndirect Module</li><li>• ULR Information Advice &amp; Guidance Module</li><li>• Industrial Relations/Collective Bargaining</li><li>• Health &amp; Safety</li><li>• Health &amp; Safety Quarry Industry</li><li>• Induction</li><li>• Equality</li><li>• Skills/Languages</li><li>• International Issues</li><li>• Pensions</li><li>• ICT</li><li>• Information &amp; Consultation</li><li>• Schools briefings</li><li>• Handling Members Problems</li><li>• Introduction to Employment Law</li><li>• Unison RMS Training</li><li>• Unions Tutor Training</li><li>• Environmental Course</li><li>• TUC Certificate in Occupational Health &amp; Safety</li><li>• TUC Certificate in Contemporary Trade Unionism</li><li>• TUC Certificate in Employment Law</li><li>• Euro Project</li><li>• Discipline and grievance</li><li>• Violence against staff</li></ul>
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5.8 TUC Education has invested considerably in e-learning capability and all core courses are now available on-line. For example, the on-line learning programme for trade union education at Stow College has recently been commended as a sector leading and innovative practice.<sup>26</sup> Nonetheless, according to their officer in Scotland, TUC Education provision has potential for expansion geographically, in particular to the North East and far north of Scotland, and to the Borders.

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<sup>26</sup>HMIe, 2007 *op cit*.



- 5.9 The priorities of TUC Education provision in Scotland are derived from wider unionlearn priorities and as a response to particular areas of need within trade unions. On most areas of provision there is widespread agreement as to the need for it; on others, such as CPD for union professionals, there is greater contention. According to the TUC Education Officer in Scotland, there is significant variation across unions in Scotland in the strategic priority given to union education.
- 5.10 We undertook a survey of union officers/union professionals in Scotland in order to obtain further information on the current and prospective level of provision of union education within individual unions. Thirty nine surveys were issued to union officers/professionals in STUC affiliated unions and one to the Royal College of Nursing. Eight of these were returned, constituting a response rate of 20%. Together, these unions comprise 20% of STUC's affiliated membership. As the total population for this survey is small, a 20% response rate while credible does not produce data capable of quantitative analysis. Thus, the analysis below uses the data in an illustrative rather than quantitative way.
- 5.11 The surveys were completed by those who have responsibility for education within their trade union. Although they were not all education officers, some had held this responsibility for a number of years with two of them having 10 years experience. Three unions also indicated that they shared this responsibility with a colleague.
- 5.12 The sample included small and large unions with membership numbers ranging from 886 to 77,000 (see Table 5.3 below). One union also included student memberships. This range is reflected in the number of officers, representatives and members who took part in union education with the most recent recorded annual data showing figures between 5 and 2000. Two unions were unable to provide this requested information. Five unions were able to supply recent statistics on the number of members in Scotland who participated in union-led learning. For the unions that did respond, numbers ranged between 11 and 7000.

**Table 5.3: Union membership**

Union	Membership numbers
1	1557 (+247 student members)
2	77000
3	3000
4	36000
5	886
6	900
7	37000
8	2200

5.13 The UO/UP respondents were responsible for members across all industrial sectors and from all occupational groups.

5.14 Table 5.4 shows the number of people in the sample who undertook trade union education in the most recent year for which annual data is available. Data is presented as a range.

**Table 5.4: Trade union education**

	Number taking part in union education/training (range where applicable)	% Female (range where applicable)	% on TUC accredited courses
Employed Union officers/professionals	2-32 (n=5)	20-100% (n=4)	100% (n=2)
Lay branch officers	20-200 (n=3)	3-80% (n=3)	-
Shop Stewards	7-1500 (n=5)	24-80% (n=5)	42%, 100% (n=2)
ULRs	4-131 (n=6)	30-100% (n=5)	100% (n=1)
H&S representatives	1-1500 (n=6)	30-80% (n=5)	50%, 100% (n=2)
Pensions representatives or trustees	6 (n=1)	30% (n=1)	-
Equality representatives	50 (n=1)	30% (n=1)	-
Other representatives	-	-	-
Members	10-69 (n=2)	30%,51% (n=2)	-
Others	-	-	-

5.15 The respondents indicated that they engaged in all core representative and officer education. They also identified specific engagement in education on the law,

globalisation, bullying, pensions, assertiveness, ULR and IR induction courses and sector specific courses.

5.16 Respondents were asked if demand for union education within their own union was likely to change over the next 1-2 years. For each of the three time periods specified, a majority of UO/UP respondents indicated an increase in demand for every category undertaking union education. Only one union reported a slight decrease in union officer/professional education over 3-4 years, while one other predicted a slight decrease in demand for shop steward education over a five year period.

**Table 5.5: Projected numbers in trade union education in the next 1-2 years**

	Union 1	Union 2	Union 3	Union 4	Union 5	Union 6	Union 7	Union 8
Union officers/professionals	2	60	-	10	4	-	20	4
Lay branch officers	-	400	-	175	-	-	25	2
Shop stewards	5-10	3000	-	175	350	-	200	5
ULRs	10-20	200	-	30	-	20	130	10
H&S representatives	5-10	3000	-	145	-	-	85	5
Pensions reps or trustees	-	150	-	-	-	-	-	1
Equality representatives	-	100	-	-	-	-	-	-
Other representatives	-	-	-	-	-	-	-	-
Members	-	200	-	180	-	-	7000	-
Other	-	-	-	-	-	-	-	-
<b>Total Projected Numbers</b>								

5.17 We asked respondents to give some indication of any factors that might change the demand for union education in Scotland. The responses are listed in Table 5.6 below.

**Table 5.6: Factors that might lead to change in the demand for trade union education in Scotland and the direction of change**

<b>Factors influencing the demand for trade union education</b>	<b>Increase</b>	<b>Decrease</b>
Where union undertakes training instead of STUC/TUC (ie for ULRs)	✓	
Use of general TUC training in England	✓	
Courses responsive to organising issues	✓	
Development of campaigning courses	✓	
Workplace focused courses	✓	
Mergers/creation of new union	✓	
Membership growth	✓	
Shift to organising approach	✓	
Change of government		✓
De-recognition of major employer		✓
We want our local reps to attend TUC Stage 1 & 2 courses	✓	
Agenda for change and knowledge and skills framework	✓	
Raising awareness of learning rep role	✓	
Some employers becoming very proactive in broader education		✓
Introduction of health care support workers to RCN membership	✓	

5.18 Respondents were asked their view about the following statements regarding current learning provision for unions in Scotland. Table 14 shows responses from the 8 unions. Data is reported in numbers due to the small sample.

**Table 5.7: Views on current learning provision for unions in Scotland (number of respondents)**

	Strongly agree /agree	Neutral	Disagree /strongly disagree
We are generally happy with the quality of externally provided union education courses	3 3	3	
We have sufficient influence over the content of externally provided union education	2	4	1
We have concerns over the cost of externally provided union education		5	2
Courses are available at times of the year when we need them	2	4	1
The quality of union education courses is highly variable	1	5	
Courses are available at the times of the day that suit our staff, representatives and members	4	2	1
It is difficult to know how to access existing union education courses	1	2	5
We prefer to use in-house rather than external courses for our employed union officers/professionals	3	2	2
We prefer to use in-house rather than external courses for our representatives	5	2	1
External providers are able to deliver courses at locations that suit our staff, representatives and members	2	4	1
Education providers are slow in responding to the changing needs of unions regarding education	2	3	3
Having flexible modes of education delivery (eg. Distance learning, e-learning) is important for our staff, representatives and members	5	3	
Within this union, we know enough about the education marketplace to contract effectively	3	3	2

The data presented in Table 5.7 above indicated a largely positive perception on the availability, quality and costs of union education, and on the degree to which unions are able to influence the content and delivery of courses. This is consistent with the evaluation of the later rounds of SULF (Findlay et al, 2006).

5.19 Respondents were also asked to indicate how far they agreed with the statements in Table 5.8 in relation to all union learning provision (including union education) in Scotland.

**Table 5.8: Opinions on all union learning provision in Scotland (number of respondents)**

	Strongly agree /agree	Neutral	Disagree /strongly disagree
By working together, unions could negotiate better arrangements with educational providers	5	2	1
Union education provision is disjointed and could benefit from economies of scale	4	3	1
My union does not need to learn lessons from the involvement of other unions in education and learning		2	6
It would be useful for this union to have approved providers of union education	5	3	
There is unnecessary duplication of effort by unions in accessing education services	4	3	1
Union-led learning in England and Wales is benefiting from having a single union brand in unionlearn		5	1
Unions could deliver many more learners and learning outcomes if public funding for learning was significantly increased	6	2	
We have access to enough information and research on union-led learning to plan this union's learning policy and approach	5	3	
As a union movement, we have little to learn from each other in terms of accessing funding for learning			8
Our union would welcome more cooperation with other unions in relation to learning	6	2	
Our ULRs need to be better supported in their activities	7		
Our learning activities have largely met all existing demand amongst our members	3	1	4
In this union, we are well informed about approaches to union-led learning in other unions	3	2	3
Unions are particularly well placed to encourage significantly more people into learning	8		
Unions have not worked well as a movement to campaign over learning and funding for learning	2	4	1
The current scale of learning activity in this union does not meet the existing demand for learning amongst our members	5	1	2
It would make sense for unions to cooperate to provide support to Union Learning Representatives	6	2	

It is clear from the responses above that these union officers believe there is considerable potential for union-led learning to expand, and that their current learning activities are not meeting the demand amongst their membership for learning. It is also clear that these union officers can see considerable potential in closer collaboration across the unions on learning activities.

5.20 Finally, we asked union officers to identify areas of learning activity and types of learner that they believe should be prioritised. Their responses are contained in the tables below.

**Table 5.9: Type of learning to be prioritised**

Union	Response
1	Union learning representatives training
2	Union organising linked learning
3	Reps training: diversity wise
4	IT, ESOL skills for life, languages
5	Basic reps course. We are a small union with little resources and budget
6	Learning that the member requests, demand led
7	Learning to enable – study skills, self development, etc learning for fun (lifelong learning) IT
8	Business skills

**Table 5.10: Type of learners to be prioritised**

Union	Response
1	ULRs
2	Reps and learning for non-traditional learners
3	-
4	Members! Essentially level 1 and 2 learners
5	Local reps. We don't have resources to support a network of Union Learning reps
6	All who show interest
7	Potential learners not currently engaged in development
8	freelancers

## SUMMARY

5.21 There are currently more than 2200 people involved in union education in Scotland, although there are good reasons to believe that this figure is an underestimate both of actual education activity and of demand for union education. A majority of union officers believe that this demand is likely to rise in the next few years for a variety of reasons relating to strategic union factors, both internal and external.

5.22 While union officers were largely positive in their assessment of the availability, quality and cost of available union education in Scotland, they also identified the potential to expand union education and the role of closer collaboration of unions in both generating and responding to such an expansion.

## CHAPTER SIX

## CONCLUSIONS

- 6.1 The evidence contained here is the first comprehensive and formal statistical analysis of demand for union-led learning in Scotland or the UK. The research involved the use of a variety of methodological and data collection approaches. A high degree of consistency of outcome resulted from each of these approaches.
- 6.2 The demand for union-led learning has been estimated from a telephone survey of employees in organisations with a union presence, formal statistical modelling and from surveys of ULRs and union officers. This has allowed for a detailed consideration of demand from different groups within the workforce, for different types of learning, and also allows for the possibility that the supply of union-led learning may create its own demand.
- 6.3 In terms of the telephone survey evidence, and even allowing for the cautious approach taken by the research team, there is strong evidence that the figure (from the Feasibility study) of 50,000 learners over 5 years, is, if anything, an underestimate of potential demand.
- 6.4 More than one third (35%) of the sample reported an intention to undertake learning. Extrapolating this figure for the relevant population, this equates to learning demand of just over 400,000. A further 21% of the survey population reported that they may undertake further learning.
- 6.5 Learning aspirations were driven by a range of factors, but were dominated by an interest in progression in one's current job and by an interest in one's career and personal development. Respondents indicated a broad range of learning interests and objectives.
- 6.6 Statistical analysis indicated that a number of factors were of crucial significance in making respondents more likely to undertake learning. These were, in



- descending order of importance, current level of qualification; involvement of a trade union in the organisation or provision of learning, and aspirations towards a higher level of income.
- 6.7 The estimate of the logit model (of the probability of having an intention to undertake learning) provides striking evidence that there is a dynamic element in this process which must be taken into account. Specifically, the estimates indicate that the very provision or organisation of learning by trade unions may, in itself, generate even more demand for learning than is currently expressed.
- 6.8 In addition, the estimates also suggest that for a specific group (those in temporary employment) the lack of provision/organisation of learning by unions may be masking a significant degree of demand from this group.
- 6.9 The ULR survey evidence is clear in identifying existing demand for learning which has not yet been met. ULRs themselves are confident that the demand for union-led learning is increasing and that, with sufficient resources, they could deliver significantly higher number of learners. Even a cautious interpretation of their estimates of unmet demand for workplace learning points to the existence of more than 50,000 prospective learners at the current time.
- 6.10 These learners would be drawn from across all occupational categories; would include a number of otherwise difficult to reach groups (eg migrant workers) and would undertake a broad range of learning activities. Any expansion of union-led learning would, of course, place additional learning demands on ULRs themselves and would highlight further the need for support for ULRs from unions and from employers.
- 6.11 The survey of union officers, and an analysis of TUC Education activities in Scotland, has revealed that there is a growing demand for trade union education. This growing demand takes a variety of forms: numbers involved, expansion of

new forms of representation and newly emerging issues facing workers and their unions. There is also potential for geographical expansion of trade union education in Scotland. Union officers indicated that demand for learning amongst their members outstripped their current provision and that, with additional resources, they could deliver many more learners. Union officers were also very clear about the benefits of closer cooperation across unions in relation to the expansion of union-led learning in Scotland.

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## **ANNEXES**

**ANNEX 1: TELEPHONE SURVEY QUESTIONNAIRE**

**ANNEX 2: UNION LEARNING REPRESENTATIVE LETTER**

**ANNEX 3: UNION LEARNING REPRESENTATIVE QUESTIONNAIRE**

**ANNEX 4: CURRENT STUC AFFILIATES**

**ANNEX 5: TRADE UNION OFFICER/UNION PROFESSIONAL LETTER**

**ANNEX 6: TRADE UNION OFFICER/UNION PROFESSIONAL QUESTIONNAIRE**

## ANNEX 1: TELEPHONE SURVEY QUESTIONNAIRE

### SULA learning demand questionnaire (for CATI)

#### *Recruitment questions:*

Are you currently employed?

Yes No

Are there any trade union members in your workplace or organisation?

Yes

No

Don't know

Do you work full or part-time?

Full time Part-time

**Record gender of respondent:** Male Female

#### *Main survey:*

1. Are you interested in taking part in any types of learning, training or development at any point in the future?
  - Yes
  - Possibly/Maybe
  - No (If no go to Question 5)
2. What kinds of learning, training or development are you interested in? (tick all that apply) **Do not read out but randomly across interviews use two/three examples as prompts if the respondent seems uncertain or hesitant.**
  - For personal interest or enjoyment (eg new languages)
  - Basic skills – reading, writing, numeracy

- IT/computing skills
- Learning related to my current job
- Learning for my professional development
- Learning to achieve a formal qualification/accreditation
- Learning to be a union representative
- Other (please specify)
- Don't know/can't say

3. When would you consider taking part in learning, training or development? (Read out)

- I am currently undertaking learning
- Next year
- Within 2-3 years
- Within 4-5 years?
- 5+ years
- Don't know/ can't say

4a. What would make you more likely to take part in learning, training or development?  
(tick all that apply but do not prompt)

- Nothing
- More self-confidence
- Finding something that I'm interested in
- More information on what learning is available
- More encouragement to do so
- A lower workload/fewer working hours
- Time off work
- Learning available at work
- Flexible delivery – eg distance learning, e-learning
- Learning available at flexible times
- Funding
- Childcare facilities/more support with my dependents
- Family support
- Taking part alongside friends or colleagues
- Other (please specify)
- Don't know/ can't say

4b What is the most important?

5. Would you be more likely to get involved in learning, training or development if  
(read out)

- |   |        |
|---|--------|
| • you could get advice from someone at your workplace?        | Yes/No |
| • you could get encouragement from someone at your workplace? | Yes/No |
| • it was organised for you through a trade union?             | Yes/No |
| • it was based at your workplace                              | Yes/No |



6. What is your highest educational qualification?
  - No qualifications
  - S/NVQ level 1 – eg general standard grades, GNVQ foundation level
  - S/NVQ level 2 – eg credit standard grades, GNVQ intermediate
  - S/NVQ level 3 – eg advanced/higher grades, HNC, BTEC, RSA higher
  - S/NVQ level 4 – eg first degree, HND, Diploma
  - S/NVQ level 5 – eg Higher degree and postgraduate study
  
7. Is your current employment permanent or temporary?
  - Permanent
  - Temporary
  
8. What is your main job or occupation? (Record job title and describe their job)
  
9. Are you employed by a public sector body (eg local authority, Police, NHS, civil service)?
  - Yes
  - No
  
10. What is the main activity and business of your employer? (describe and record in full)
  
11. Are you a member of a trade union Yes/No
  
12. What is your ethnic group? (do not read out but put Census 2001 categories below as options and as prompts)
  
13. Do you have a disability or impairment?
  - Yes
  - No
  
14. Do you have children or other dependents?
  - Yes
  - No
  
15. What is your current gross annual income? (Do not read out)

- Less than £15,000
- £15,000-23,999
- £24,000-39,999
- £40,000+
- Don't know
- Prefer not to say

16. What is your total gross household income each week or month including all wages, salaries and benefits? (Do not read out but record one only)

- £ per week
- £ per month
- Don't know
- Prefer not to say

17. Do you expect to earn **significantly** more in the future than you do now?  
Yes/No/Don't know

## ANNEX 2: UNION LEARNING REPRESENTATIVE LETTER

### Learning Demand Research

#### Union Learning Representatives Questionnaire

This questionnaire forms part of a research project to estimate demand for union led-learning, including trade union education, in Scotland. This research has been commissioned by the STUC. It is to be completed by union learning representatives in Scotland.

The questionnaire is in three parts: Section A relates to your workplace; Section B focuses on current demand for union-led learning; and Section C focuses on future demand for union-led learning. The questionnaire should take around 15 minutes to complete. Some figures/statistics are requested: *these need only be approximate.*

This research must be reported on before Christmas 2006. Given this, **it is crucial that we receive completed questionnaires as soon as is possible, and preferably within 2 weeks of receipt.** Your participation is crucial to the success of this project and we are very grateful for your co-operation with regard to this timescale.

If you have any queries in relation to this questionnaire, please contact either Patricia Findlay (email [P.Findlay@ed.ac.uk](mailto:P.Findlay@ed.ac.uk); phone 07931 294672) or Sylvia O'Grady (email [so'grady@stuc.org.uk](mailto:so'grady@stuc.org.uk); phone 0141 337 8124).

Once completed, please put the questionnaire in the reply paid envelope provided and post to P Findlay, c/o STUC, 333 Woodlands Road, Glasgow, G3 6NG.

Thank you for taking the time to complete this questionnaire. The data provided is crucial to an accurate assessment of the demand for union education and union-led learning in Scotland. The results of this research will be made available to participants in due course.

This questionnaire is being sent to all ULRs on the STUC database. If there are other ULRs in your union who have not received a questionnaire, please alert them to the copy

of the questionnaire on the STUC website and invite them to print and return a response. Obviously, only one response should be returned by each union learning representative.

Yours sincerely

Learning Demand Research Team:

Patricia Findlay, Jeanette Findlay, Chris Warhurst.

**ANNEX 3: UNION LEARNING REPRESENTATIVE QUESTIONNAIRE**

**Learning Demand Research  
Union Learning Representatives Questionnaire**

**A. About your workplace**

1. In what *sector* is your employer?

Private

Public

Voluntary

2. In what *industry* sector is your employer? e.g. manufacturing, retail etc...(please state in space below)

\_\_\_\_\_

3. How many people are employed in your company? (please tick one)

1-9	<input type="checkbox"/>	10-50	<input type="checkbox"/>	51 - 250	<input type="checkbox"/>	Over 250	<input type="checkbox"/>
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4. In which city, town or area is your workplace? \_\_\_\_\_

5. What is the name of your union? \_\_\_\_\_

**B. Current demand for union-led learning**

6. Approximately how many employees in your workplace have taken up union-led learning opportunities since 2000. *Please include those who have completed courses and those who are still learning*

Number: \_\_\_\_\_

7. What percentage of current learners come from each occupational group? (please ensure values add up to 100%)

Managers and Senior Officials.....	_____ %	Personal Service.....	_____ %
Professionals.....	_____ %	Sales and Customer Service.....	_____ %
Associate Professional and Technical.....	_____ %	Process, Plant and Machine Operatives.....	_____ %
Administrative and Secretarial.....	_____ %	Elementary/unskilled.....	_____ %
Skilled Trades.....	_____ %	Other (please state below).....	_____ %

8. What is the gender breakdown of current learners? (please tick one)

All female	Mainly female	Equal mix of male and female	Mainly male	All male
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. Approximately what percentage of current learners are ethnic minorities? \_\_\_\_\_ %

10. Approximately what percentage of current learners are non-British/migrant workers? \_\_\_\_\_ %

11. Approximately what percentage of current learners fall into each age group?

21 and under \_\_\_\_\_ %      50 and over \_\_\_\_\_ %

12. Approximately what is the percentage of current learners in each type of employment? (please ensure values add up to 100%)

Full-time permanent	_____ %	Part-time permanent	_____ %
---------------------	---------	---------------------	---------

Full-time temporary	_____ %	Part-time temporary	_____ %
---------------------	---------	---------------------	---------

13. Approximately what percentage of current learners work shifts? \_\_\_\_\_ %

14. Approximately what percentage of current learners have undertaken the following types of learning?

a. Accredited courses	_____ %	Non-accredited courses	_____ %
b. Job-related courses	_____ %	Personal interest courses	_____ %

### C. Future demand for union-led learning

15. Approximately how many *more* employees would like to undertake union-led learning opportunities, if the opportunity existed, but have not yet done so?

No. \_\_\_\_\_

16. Is the demand for union-led learning... (please tick one)

Increasing?	Staying about the same?	Decreasing?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17. Given sufficient resources, could you ...

double the number of union members undertaking union-led learning?      Yes       No

treble the number of union members undertaking union-led learning?      Yes       No

quadruple the number of union members undertaking union-led learning?      Yes       No

18. Approximately what percentage of *new* learners would come from each occupational group? (please ensure values add up to 100%)

Managers and Senior Officials.....	_____ %	Personal Service.....	_____ %
Professionals.....	_____ %	Sales and Customer Service.....	_____ %
Associate Professional and Technical.....	_____ %	Process, Plant and Machine Operatives.....	_____ %
Administrative and Secretarial.....	_____ %	Elementary/unskilled.....	_____ %
Skilled trades.....	_____ %	Other (please state below).....	_____ %

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19. What would be the gender breakdown of new learners? (please tick one)

All female	Mainly female	Equal mix of male and female	Mainly male	All male
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

20. Approximately what percentage of new learners would be ethnic minorities? \_\_\_\_\_ %

21. Approximately what percentage of new learners would be non-British/ migrant workers? \_\_\_\_\_ %

22. Approximately what percentage of new learners would fall into each age group? (please ensure values add up to 100%)

21 and under \_\_\_\_\_ %      50 and over \_\_\_\_\_ %



23. Approximately what percentage of new learners would be from each type of employment? (please ensure values add up to 100%)

Full-time permanent	_____ %	Part-time permanent	_____ %
Full-time temporary	_____ %	Part-time temporary	_____ %

24. Approximately what percentage of new learners would be shift workers? \_\_\_\_\_ %

25. Approximately what percentage of new learners, would require each type of learning?

a. Accredited courses	_____ %	Non-accredited courses	_____ %
b. Job-related courses	_____ %	Personal interest courses	_____ %

26. What factors do you believe would help stimulate further union-led learning? (please list all those factors that you think would help)

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

**Thank you for completing this questionnaire.  
Your co-operation is greatly appreciated.**

## **ANNEX 4: CURRENT STUC AFFILIATES**

1. Accord
2. Amicus
3. Associated Society of Locomotive Engineers and Fireman
4. Broadcasting, Entertainment, Cinematograph and Theatre Union
5. Bakers, Food and Allied Workers Union
6. British Dietetic Association
7. British Orthoptic Society
8. Chartered Society of Physiotherapy
9. Colliery Officials and Staff Area: NUM
10. Communications Workers Union
11. Community
12. Community and District Nursing Association
13. Connect
14. Educational Institute of Scotland
15. Equity
16. FDA
17. Fire Brigades Union
18. GMB
19. Musicians Union
20. National Association of Schoolmasters/Union of Women Teachers
21. National Union of Journalists
22. Nautilus UK
23. National Union of Mineworkers: Scotland Area
24. National Union of Rail, Maritime and Transport Workers
25. Prison Officers Association (Scotland)
26. Prospect
27. Public and Commercial Services Union
28. Scottish Carpet Workers' Union
29. Scottish Secondary Teachers' Association
30. Scottish Society of Playwrights
31. Society of Chiropodists and Podiatrists
32. Society of Radiographers
33. Transport and General Workers Union
34. Transport Salaried Staffs' Association

35. Union of Construction, Allied Trades and Technicians
36. Unison
37. Universities and Colleges Union
38. United Road Transport Union
39. Union of Shop, Distributive and Allied Workers

## ANNEX 5: TRADE UNION OFFICER/UNION PROFESSIONAL LETTER

### Learning Demand Research

#### Trade Union Officer/Union Professional Questionnaire

Dear Colleague

This questionnaire forms part of a research project to estimate demand for union led-learning, including trade union education, in Scotland. This research has been commissioned by the STUC. It is to be completed by union officers with responsibility for education/learning in Scotland. If this is not your remit, please pass this questionnaire on to the appropriate person within your union.

The questionnaire is in four parts: Section 1 relates to you, your union and your membership; Section 2 focuses on trade union education; Section 3 focuses on union-led learning, and Section 4 relates to general opinions on union-led learning (including trade union education). The questionnaire should take around 15 minutes to complete.

If you have any queries in relation to this questionnaire, please contact either Patricia Findlay (email [P.Findlay@ed.ac.uk](mailto:P.Findlay@ed.ac.uk); phone 07931 294672) or Sylvia O'Grady (email [so'grady@stuc.org.uk](mailto:so'grady@stuc.org.uk); phone 0141 337 8124).

This research must be reported on before Christmas 2006. Given this, **it is crucial that we receive completed questionnaires as soon as is possible, and at the latest within 2 weeks of receipt.** Your participation is crucial to the success of this project and we are very grateful for your co-operation with regard to this timescale.

Once completed, please return this questionnaire in the reply paid envelope provided to Patricia Findlay, c/o STUC, 333 Woodlands Road, Glasgow, G3 6NG.

Thank you for taking the time to complete this questionnaire. The data provided is crucial to an accurate assessment of the demand for union education and union-led

learning in Scotland. The results of this research will be made available to participants in due course.

Yours sincerely

Learning Demand Research Team:  
 Patricia Findlay, Jeanette Findlay, Chris Warhurst.

**ANNEX 6: TRADE UNION OFFICER/UNION PROFESSIONAL QUESTIONNAIRE**

**Union-led Learning (including trade union education) in Scotland**

**Section 1: You, your union and your membership**

1. Which trade union are you employed by?	
2. How many members do you have in Scotland?	
3. What is your job?	
4. Are you responsible for union education in Scotland and if so, how long have you held this responsibility?	
5. How many of your officers, representatives and members in Scotland took part in <i>union education</i> in the most recent year for which annual data is available?	
6. How many of your members in Scotland took part in other <i>union-led learning</i> in the most recent year for which annual data is available?	

7. Please indicate below the sectors in which your members in Scotland work (tick all boxes that apply):

Agriculture, hunting and forestry		Fishing		Mining and Quarrying	
Manufacturing		Electricity, gas and water supply		Construction	
Wholesale and Retail Trade including Repairs		Hotels and restaurants		Transport, storage and distribution	
Financial intermediation		Real estate, renting and business activities		Public administration and defence, social security	
Education		Health and social work		Other community, social and personal service activities	
Private households with employed persons		Extra-territorial organisations and bodies			
Other (please specify)					

8. Please indicate below the occupational groups to which your membership in Scotland belong (tick all boxes that apply):

Managers and senior officials		Professionals		Associate professional and technical	
Administrative and secretarial		Skilled trades		Personal service	
Sales and customer service		Process, plant and machine operatives		Elementary/unskilled	
Other (please specify)					

## **Section 2: Trade union education in Scotland**

*NB. All questions relate to your officials, officers, representatives and members in Scotland only.*

9. Please indicate below the numbers of people in your union who undertook trade union education in the most recent year for which annual data is available.

	Number taking part in union education/ training	% Female	% on TUC accredited courses
Employed Union officers/professionals			
Lay Branch officers			
Shop stewards			
Union Learning Representatives			
Health and Safety Representatives			
Pensions representatives or trustees			
Equality representatives			
Other representatives (please specify)			
Members			
Others (please specify)			

10. Please indicate the type of union education undertaken within your union. Please tick all that apply and add additional categories as appropriate.

Union representatives stage 1	<input type="checkbox"/>	Union officers/professionals CPD	<input type="checkbox"/>
Union representatives stage 2	<input type="checkbox"/>	Union Learning Representatives: Initial training	<input type="checkbox"/>
Union representatives Level 3 Certificate	<input type="checkbox"/>	Union Learning Representatives: additional modules	<input type="checkbox"/>
Health and safety representatives Stage 1	<input type="checkbox"/>	Union Learning Representatives Level 3 Award	<input type="checkbox"/>
Health and safety representatives Stage 2	<input type="checkbox"/>	Equalities training	<input type="checkbox"/>
Health and safety representatives Level 3 Certificate	<input type="checkbox"/>	Other (please specify)	<input type="checkbox"/>
Union officers/professionals induction	<input type="checkbox"/>	Other (please specify)	<input type="checkbox"/>



11. In general terms, how is the demand for union education within your union likely to change over the next **1-2 years** for each of the groups listed below?

	Increase significantly	Increase slightly	Stay much the same	Decrease slightly	Decrease significantly	Don't know
Union officers/professionals						
Lay branch officers						
Shop Stewards						
Union learning representatives						
Health and Safety Representatives						
Pensions representatives or trustees						
Equality representatives						
Other representatives						
Members						
Others						

12. In general terms, how is the demand for trade union education within your union likely to change over the next **3-4 years** for each of the groups listed below?

	Increase significantly	Increase slightly	Stay much the same	Decrease slightly	Decrease significantly	Don't know
Union officers/professionals						
Lay branch officers						
Shop Stewards						
Union learning representatives						

Health and Safety Representatives						
Pensions representatives or trustees						
Equality representatives						
Other representatives						
Members						
Others						

13. In general terms, how is the demand for trade union education within your union likely to change beyond the next **5 years** for each of the groups listed below?

	Increase significantly	Increase slightly	Stay much the same	Decrease slightly	Decrease significantly	Don't know
Union officers/professionals						
Lay branch officers						
Shop Stewards						
Union learning representatives						
Health and Safety Representatives						
Pensions representatives or trustees						
Equality representatives						
Other representatives						

Members						
Others						

14. Where possible, can you indicate the projected numbers of each of the following categories that you expect to be involved in trade union education in the future?

	Next 1-2 years		Next 1-2 years
Employed union officers		Pensions trustees	
Lay branch officers		Equality representatives	
Shop stewards		Other representatives	
Union Learning Representatives		Members	
Health and safety representatives		Others	

15. Please indicate in the box below up to 5 factors that might lead to a change in the demand for trade union education in Scotland and the direction of change.

Factor influencing the demand for trade union education	Increase	Decrease

### Section 3 – Demand for union-led learning

16. How many people in your union took part in union-led learning (eg SULF) in the last completed year for which data is available?	
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17. What was the occupational group of these learners? (please tick all that apply)

Managers and senior officials	<input type="checkbox"/>	Professionals	<input type="checkbox"/>	Associate professional and technical	<input type="checkbox"/>
Administrative and secretarial	<input type="checkbox"/>	Skilled trades	<input type="checkbox"/>	Personal service	<input type="checkbox"/>
Sales and customer service	<input type="checkbox"/>	Process, plant and machine operatives	<input type="checkbox"/>	Elementary/unskilled	<input type="checkbox"/>

Other (please specify)
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18. Approximately what percentage of these learners undertook the following types of learning?

a. Accredited courses	%	Non-accredited courses	%
b. Job-related courses	%	Personal interest courses	%

19. Given sufficient resources, could you ...

double the number of union members undertaking union-led learning?	Yes		No	
treble the number of union members undertaking union-led learning?	Yes		No	
quadruple the number of union members undertaking union-led learning?	Yes		No	

**Section 4: General opinions on union-led learning (including trade union education)**

20. Please indicate your view of the following statements regarding current learning provision for unions in Scotland.

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Don't know/not applicable
We are generally happy with the quality of externally provided union education courses.						
We have sufficient influence over the content of externally provided union education.						
We have concerns over the cost of externally provided union education.						
Courses are available at times of the year when we need them.						
The quality of union education courses is highly variable.						
Courses are available at the times of the day that suit our staff, representatives and members.						
It is difficult to know how to access existing union education courses.						
We prefer to use in-house rather than external courses for our employed union officers/professionals.						
We prefer to use in-house rather than external courses for our representatives.						
External providers are able to deliver courses at locations that suit our staff, representatives and members.						
Education providers are slow in responding to the changing needs of unions						

regarding education.						
Having flexible modes of education delivery (e.g. distance learning, e-learning) is important for our staff, representatives and members.						
Within this union, we know enough about the education marketplace to contract effectively.						

21. Please indicate how far you agree with the following statements in relation to all union learning provision (including union education) in Scotland?

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Don't know
By working together, unions could negotiate better arrangements with educational providers.						
Union education provision is disjointed and could benefit from economies of scale.						
My union does not need to learn lessons from the involvement of other unions in education and learning						
It would be useful for this union to have approved providers of union education.						
There is unnecessary duplication of effort by unions in accessing education services.						
Union-led learning in England and Wales is benefiting from having a single union brand in unionlearn						
Unions could deliver many more learners and learning outcomes if public funding for learning was significantly increased.						
We have access to enough information and research on union-led learning to plan this union's learning policy and approach.						
As a union movement, we have little to learn from each other in terms of accessing funding for learning.						
Our union would welcome more co-operation with other unions in relation to learning.						
Our ULRs need to be better supported in their activities						
Our learning activities have largely met all existing demand amongst our members.						
In this union, we are well informed about						



approaches to union-led learning in other unions.						
Unions are particularly well placed to encourage significantly more people into learning.						
Unions have not worked well as a movement to campaign over learning and funding for learning						
The current scale of learning activity in this union does not meet the existing demand for learning amongst our members.						
It would make sense for unions to co-operate to provide support to Union Learning Representatives.						

22. What sort of <i>learning</i> should be prioritised in your union in the future?	
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23. What sort of <i>learners</i> should be prioritised in your union in the future?	
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**Thank you for completing this questionnaire.  
Your co-operation is greatly appreciated.**