

# **CWU Redesign Education, Learning and Training Strategy January 2019**

## **Introduction**

The Framework Policy Document for Education, Learning and Training was endorsed by CWU Conference as the clear basis for developing a comprehensive new strategy for the whole union, which will be placed before our General Conference in April 2019 for agreement.

This policy document sets out the vision for this strategy, and a number of key objectives and questions that the formulation of the strategy addressed. The document has been developed through a Scoping Group whose role has been to develop a comprehensive Education, Learning and Training Strategy. The Scoping Group included representation from four members of the NEC (two from each industrial constituency), the Education & Training Department, a Regional Secretary and the General Secretary's department. They are:

- Tracey Fussey
- Tom Cooper
- David Wilshire
- Steve Halliwell
- Ian Murphy
- Trish Lavelle (Officer)
- Lee Wakeman (Policy support)
- Paul Dovey (Policy support)
- Dawn Jeffrey - Redesign (Administrative Support)

This group reports to the NEC and was charged with setting out a new comprehensive policy based on the clear themes in the original Framework Document.

The Scoping Group met 3 times between November 2018 and February 2019.

The Policy Framework Document agreed by the Special Redesign Conference set out the terms of reference for this group. Conference agreed unanimously that the key objective would be:

***“...to develop a clear unified strategy position for the whole union on how we develop, deliver and resource education, learning and training for our representatives and members that supports the CWU's core policies and strategies and is flexible, affordable, accessible and relevant.***

***Additionally, any future policy must address the very real challenges faced by the union in regards to the potential for diminishing or insecure funding for either Learning Projects and for activist training through colleges, any weakening of***

***employer release agreements, the changing nature of our representative structures and the need to improve and expand digital learning.”***

In addition to the clear objectives set out in the framework document, the Scoping Group have considered a great deal of additional data, the responses to a Branch consultation and other relevant information in producing this strategy and key recommendations. We have included relevant source data where appropriate within the document for information.

### **The Vision for CWU Education, Learning and Training**

In line with our objectives under Rule and NEC / Conference policy, the CWU is committed to providing a unified and whole union approach to accessible, inclusive and relevant education, learning and training for our activists and our members.

Specifically we provide education, learning and training for the following reasons:

- To underpin our industrial, organisational and political effectiveness by having informed, skilled and effective representatives at all levels and in all parts of the organisation
- To promote trade union values and behaviours
- To raise political consciousness and understanding of our core values and of the systems and conditions which impact on the lives of working class people
- To provide and promote opportunities for our activists and members to fulfil their potential at work and in society
- To support equality of opportunity and to remove barriers to participation in the union, politics and society in general for disadvantaged and under-represented groups

Our starting point is to recognise that a full discussion on what we are trying to achieve on Education, Learning and Training is timely given the changes that may impact on our work in this area including:

- The need to redesign our offer to reps and activists and to ensure that this is inclusive and accessible
- The need to ensure that our education, learning and training activity is geared towards the new world of work
- The ongoing pressures on government funding, which has been decreasing for some years and on which we have some reliance
- The impact of the asset review and in particular the need to consider and plan for suitable alternative arrangements for activist training if we do not own our own residential education and training centre
- The need to make our education, learning and training activity financially sustainable through addressing costs and avoiding duplication of effort

## **What We Do Now**

The union has had a single integrated education, learning and training department since 2002. In that same year Conference adopted a very comprehensive policy which has underpinned our approach to education, learning and training ever since and which emphasised the value of integrated education, learning and training and the importance of accredited learning and residential training.

This model has served us well, and has supported an approach and vision that has seen us:-

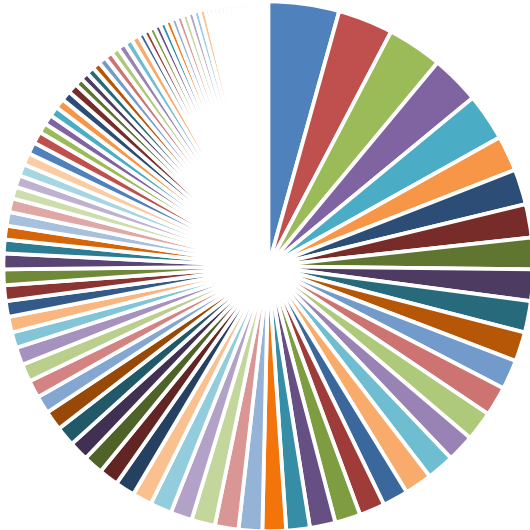
- Develop an integrated programme that gives reps the skills, knowledge and confidence to deliver in the workplace
- Deliver education, learning and training via residential and Regional courses to circa 2,000 representatives each year
- Deliver learning opportunities to circa 10,000 of our members each year
- Develop a strong and self-sustaining network of Branch based Union Learning Reps and Learning Centres and a Regional structure to support CWU Learning
- Developed our own online learning platform at a fraction of the cost of a commercial set up which now has over 4,021 learners and has steady month on month growth in members and reps accessing blended, online and “bite size” courses
- The department oversees the union’s mentoring programme, the scholarship fund to support degree level study and works with a number of partner organisations and colleges to promote, deliver and develop learning opportunities for our activists

The programme we offer to Branches is valued, with good levels of participation by many (but not all) Branches and activists. However, there is not a great deal of consistency in approach to organising and supporting representative’s education and training from either Regions or Branches, which means that at one end of the scale there are Branches who systematically provide and engage with training and open up opportunities to all representatives and at the other there are Branches who train very few or no representatives.

For example looking at reps trained in 2018 we can see that 104 branches participated in residential education – but only 24 branches accounted for 50% of the total. The figures were even more inconsistent for regional training, with 86 branches participating and only 11.6 branches accounting for 50% of the total. See below:

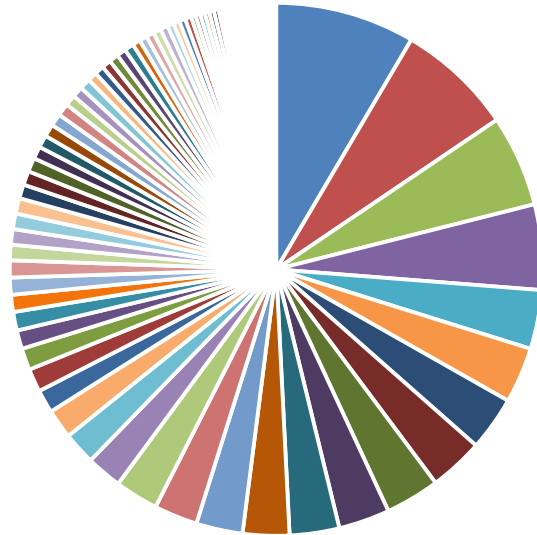
## Residential

24 Branches account for 50%  
104 Branches participating



## Regional

11.6 Branches account for 50%  
86 Branches participating



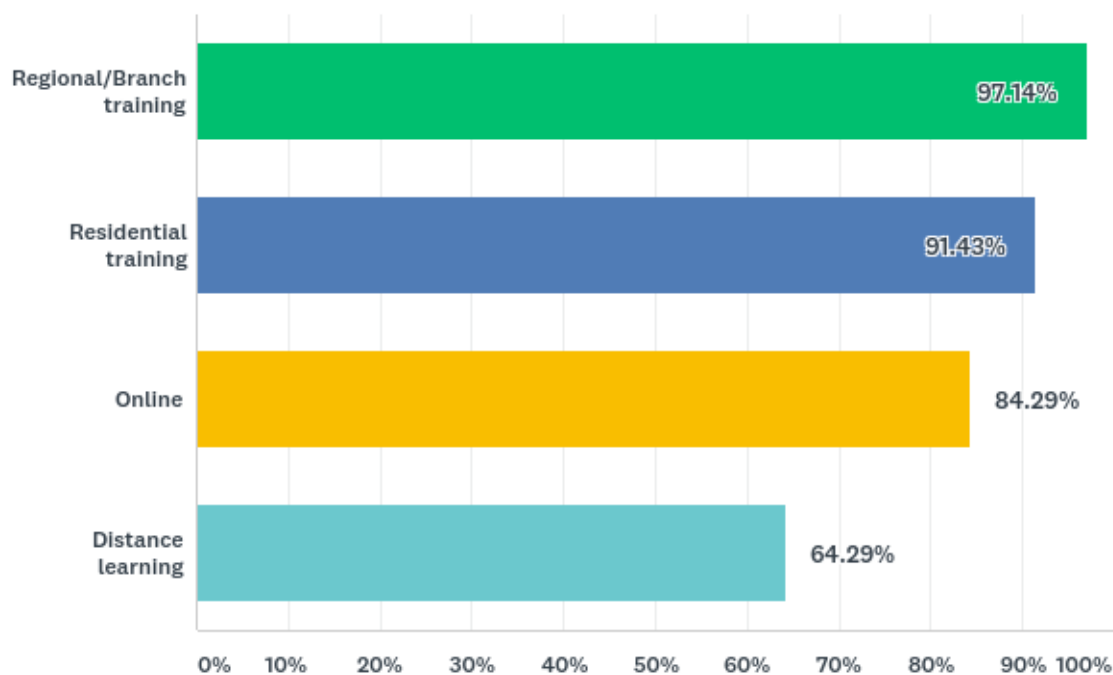
We have based much of our past strategy on “building based” education, learning and training from Alvescot Lodge and before that the Elstead Hotel. Residential courses are viewed as positive in terms of creating a single union identity with reps attending courses with people from all parts of the union. However, not all Branches access courses there.

Residential Training 20 most active branches	
Branch	Reps
South East No 5	36
Portsmouth and District Postal	28
Wessex South Central	28
South Central Postal	25
Romford Amal	24
Eastern No 5	18
Leicestershire	18
Western Counties	17
Bradford and District Amal	16
Colchester and District	16
Southdowns Weald and Rother	16
Doncaster and District Amal	15
Essex Amal	15
Highland Amal	15
Northern/North West London	15
Croydon and Sutton Amal	14
Gloucestershire Amal	14
Somerset, Devon and Cornwall	14
Greater Mersey & SW Lancs Amal	13
Leeds No 1 Amal	13

Regional Training 20 most active branches	
Branch	Reps
Scotland No 2	90
South Midlands Postal	75
Kent Invicta	59
Birmingham and District Amal	55
South Yorkshire and District	38
Greater Manchester	36
Bristol and District Amal	35
North Lancs. And Cumbria	35
Northern Home Counties Postal	35
Leeds No 1 Amal	33
South West No 7	32
Eastern No 5	30
Nottingham and District	30
Glasgow and District Amal	28
North Staffordshire Postal	28
Hull and East Ridings Amal	23
Plymouth and East Cornwall	21
Newcastle Amal	19
London South West (Postal)	15
Somerset, Devon and Cornwall	15

So, although residential training is consistently ranked as an “important” part of what we do, with 91.43% of respondents saying it was important, even more (97.14%) said regional courses were important. We currently have 4902 reps on the CWU database. In the past year 38.7% of them accessed education and training. While this is a healthy figure we need to ask about the other 61.3%. Have they accessed education and training in previous years or have they missed out all together? As our E&T and membership data is pulled more closely together we will be able to develop a better view on this – but there was clear evidence from the branch survey that some branches (perhaps most) have reps who cannot access residential education and training. Last year 56% of our education and training was delivered regionally and 44% residentially – exacerbating the need to address the earlier figures about inconsistency in participation.

**What methods of delivery should the union deploy?** *(Select as many as you wish)*



Hence, there are a number of factors driving us towards a change in approach:

- Funding and resources
- The impact of the Asset Review
- The forecast and the current changes and shifts in the world of work
- The new and developing political landscape
- Digitalisation

The asset review presents us with an opportunity to plan an education programme, which includes residential training courses delivered away from a directly owned residential centre that we have now.

We use a variety of mostly CWU or employer sites for Regional courses (which can be a considerable financial saving to the union), and some of these sites are better equipped than others in terms of availability of IT and broadband, space, accessibility and resources. As

part of their programme of rolling out 1-day Industrial Courses, the Postal Education & Training Sub-Group conducted a survey of potential training venues in the Postal Constituency. This needs to be updated and replicated across the whole union and will be an ongoing piece of work.

Many Branches deploy ULRs to assist with the organisation of learning and this creates good practice in terms of numbers trained and the support offered to learners.

### **The Findings of the Branch Consultation**

The Redesign conference 3rd/4th November accepted **Motion 65**:

*“Conference instructs the NEC to seek the views of Branches and Regions on the bullet points on pages 39/40 of the redesign booklet. A breakdown/consensus of replies shall be included in the comprehensive draft policy document produced by the group.”*

An online survey of Branch Secretaries took place between the 13<sup>th</sup> November and the 10<sup>th</sup> of December 2018 resulting in **71 responses (55%)**. Of the 71 Branches, **54 (76%)** were from **Postal** and **13 (24%) Telecom & Financial Services**. (See Appendices 1 and 2)

It must be emphasised that the bullet points mentioned in the motion were not originally written for a survey, rather to be items for the Scoping Group to consider. Some bullet points contained several related points. This led to 13 open questions resulting in over 760 individual answers, amounting to over 25,000 words. So in other words it has produced rich qualitative data – but needs considerable work to produce any quantitative data.

From this we have been able to draw out some key themes:

- High importance was placed on industrial training and ensuring relevance and responsiveness to reps needs
- There was also discussion about tutor skills – both in understanding learner needs and industrial experience. There were calls for more “Train the Trainer” courses and Award in Education & Training (AET) courses
- Some responses focus on what they considered to be the core industries. Others recognised that we must support reps in a range of employers including non-recognised
- There was wide support for residential (91.43%), regional (97.14%), online (84.29%) and blended (64.29%) course delivery. There were enthusiasts for all – but nearly all responses recognised the need for a combination of all of these to be utilised. Some branches indicated they had venues or resources to support local training. There was some discussion around whether regional training delivered any financial savings compared to national residential training or merely moved the costs elsewhere
- Many submissions called for refresher training and ongoing development for existing reps, pointing out that legislation and the world of work moves on
- There were a lot of calls for political courses. Some wanted these directly linked to the Labour Party and the process of political representation and policy. Others also wanted wider political, economic and social understanding on the basis that this underpins political organisation and decision making

- There were also call for courses that taught Trade Union Values – both to reps and the wider membership
- There was wide recognition of the need for clear progression route for reps to enable consistency – but also wide recognition that we need personal development plans recognise individual circumstances, learning styles, employers' and roles. (NB. Scoping Group believes that if we can get these right, then everything else begins to fall into place)
- A minority of responses called for some courses to be made mandatory – some went so far as to suggest penalties for non-compliance. The more common position was for a clear progression route to be promoted via the 14 Measures, backed up by Branch audits
- There were wide calls for branches and reps to be able to feed into discussions on learning needs on an ongoing basis. Some referred to social media or physical meetings but most referred to some form of training needs analysis
- There was an expectation that Head Office Departments would work together to deliver timely and relevant education for reps, especially in the event of new tools or agreements being negotiated
- There was a wide demand for reps learning data to be made available to Branch Secretaries. (NB Scoping Group acknowledged that we are already in the midst of doing this through the OLS central database)
- There was a wide recognition of ULRs as useful for organising the training of reps. Some thought they could also deliver the training – others were more wary of this. The overall impression was that it depended on the experience of the ULR

There were some 50 specific courses and / or skills highlighted as important in the responses, see Appendix 3

## **Conclusion**

To conclude, the recommendations developed below are taken from the original framework document and further enhanced based on the responses from the Branch Consultation and the Scoping Group's deliberations. They set out the steps that need to be taken to ensure that CWU education, training and learning works across the planned three pillars to ensure that we have a consistent one union approach to developing our representatives. Once agreed, these recommendations will inform and support the skills, knowledge and values we need to develop our activist base to maintain our industrial, organising and political activity now and into the future.

## **Recommendations**

### **1. Education Supporting the 14 measures of success**

The Education and Training Programme will be used to positively support and promote the fourteen measures of success for Branches. Existing courses will promote and explain the measures to activists and specialist courses will be developed to support Branches and those who occupy key roles in Branches in meeting the fourteen measures.

### **2. Clear Development Pathway for all CWU Reps**

The NEC shall produce clear development pathways for all new representatives to ensure that they are receiving the correct learning; education and training from the word go. The pathways will include generic courses for representatives, and will cover the values, basic skills and knowledge that are required for their roles - as well as specialised courses and Industrial or Employer Specific courses where relevant. The development pathways will set out which courses are mandatory and will set out a recommended timescale in which reps should complete these courses.

### **3. Accredited/informal and formal courses**

The core programme of courses is designed to meet a clear set of standards and objectives through formal accreditation. This means that courses are delivered consistently and we have an objective way of measuring whether the aims of the course have been met and whether it has been delivered to the required standard and legal compliance. This is important in terms of ensuring that our resources are applied as effectively as possible. However, there is also demand for less formal workshops, seminars and training events. Whilst it is accepted that formal accreditation may not always be appropriate for these courses, it is still necessary to have them delivered consistently, to have clear aims and objectives and to monitor and evaluate their impact.

### **4. Tutors**

The CWU have existing policy that all tutors must be suitably experienced trade union activists with appropriate professional qualifications. The CWU commits to providing opportunities for senior CWU activists with the appropriate skills and experience to obtain these qualifications where practicable. The Industrial Executives will continue to develop facilitators who will specialise in industrial training for example via a "train the trainers" programme in the Postal Constituency.

### **5. Regular Training Needs Surveys**

In a fast changing world of work, it is necessary for us to ensure that our training, education and learning priorities are correct, current and relevant. For that reason it will be necessary to periodically and systematically assess our learning needs as an organisation. The NEC will carry out work with Branches, Regions and Industrial Executives to determine training,



education and learning priorities for our activists and will also seek to update resources and content to reflect the unions political and organising objectives and priorities.

## **6. Union Learning Representatives**

Union Learning Representatives (ULRs) play an important role in supporting learning for our members and representatives. In some Branches, ULRs have taken on a more formal role in also supporting reps skills needs, facilitating IT Skills, organising reps training and assisting the Branch with their activist training strategy. This role should become embedded in the position of all Lead ULRs and a suitable job description be drawn up. Alongside this, the CWU will continue to deliver and promote inclusive learning opportunities for our members through local learning centres, supported and promoted by trained ULRs.

## **7. Residential and Regional Courses**

All our programmes must be flexible enough to be inclusive, accessible and of a consistent quality regardless of where or how they are delivered. The asset review has brought into sharp focus the need for us to consider how we deliver our core education programme in the future. The NEC will address the issue of precisely what we do with our assets in the future in due course. However, it is incumbent upon us to ensure that any strategy sets out the options for delivering courses in the event of the closure of our dedicated residential education and training centre.

This strategy is concerned with delivering accessible education to all. As such, the future strategy will ensure that programmes will be delivered both regionally and residentially. It is the case that there are some courses that require residential delivery due to the geographical needs of attendees or to the demands of the course. However, many courses that are currently delivered residentially – particularly those aimed at new reps - can be delivered very satisfactorily regionally, especially if there is better coordination between the Education & Training Department, Branches and Regions to ensure that there are adequate training rooms / facilities in each Region and that attendance is maximised by organising, advertising and administering applications for these courses centrally and in advance as is currently the practice for Residential courses.

Thus, a Residential Programme may in the future represent 20 - 24 weeks of the year rather than the current 44 weeks on offer, and the Regional programme can grow and reach more of our representatives throughout the year.

To maximise attendance on courses we will continue to offer online or blended courses where part of the course can be completed online via distance learning. This will be particularly important for those who are working for employers where release agreements are not in place.

## **8. Industrial or Employer Specific Training**

There is significant need for “industrial” or employers’ specific training across the whole union. The CWU is committed to ensure that new representatives in particular have a very good grounding in the key industrial procedures and agreements as soon as possible after becoming reps.

It is recognised that the design and delivery of industrial programmes of courses, are for the relevant Industrial Executive to identify and determine with input from the Education and Training Department. The training is primarily technical or agreement driven in content and whilst not always accredited will be delivered by IR specialist reps. To ensure consistency and to maintain quality standards, those delivering these courses will have attained a suitable level of Industrial Executive endorsed competency to facilitate industrial training.

In addition to being responsible for identifying the specific training needs and the recruitment and training of suitably competent IR Reps as trainers or facilitators, the Industrial Executives will also lead on the scheduling of training programmes, design and provide course materials and identify the required resources and training hubs. The Education & Training Department will be supplied with all necessary monitoring, record keeping and compile evaluation reports as required.

## **9. Mentoring**

The role of mentoring in supporting, developing and encouraging reps is an important part of what we do to supplement and compliment education, learning and training. The CWU will continue to roll out our formal mentoring scheme and to incorporate and encourage informal mentoring through embedding mentoring skills in our courses for senior activists.

## **10. Online Toolkits**

As well as formal courses we should develop online, easy to use and access toolkits for each role in the CWU that has all the information and resources that they need in one place which can be regularly updated and can provide ongoing support, refresher training and vital resources for representatives regardless of where they might live or work.

## **11. Left Click**

The CWU will continue to expand and develop our successful CWU digital skills platform to ensure that we are providing cutting edge support and learning to members and reps. Left-Click is already used by many reps and offers blended courses, short modular courses and targeted learning for specific needs. Left Click will continue to expand what can be offered with a strong focus on in-house designed toolkits, modular courses and blended learning as well as offering high quality third party courses.

## **12. CPD for Senior Activists and Staff**

The CWU will provide and promote opportunities for trade union specific continuing professional development to staff, NEC / Industrial Executive members, Regional Secretaries and Officers of the CWU through access to higher education, relevant qualifications.

## **13. Political Education**

At a time where political education is absent and diminishing in both compulsory and post 18 education and where there is so much misinformation and dumbing down of news coverage, it has never been so important to ensure that trade unionists can access genuine political education, on economics, the political systems that govern us, human rights and workers' rights and the history of our movement. There is also a continuing need to work with various like-minded and aligned organisations to ensure that working class people come forward and are encouraged and supported into political representation at local and National level.

## **14. Partnerships**

To develop strategic partnerships with organisations in politics, education and the community that share our aims and values to provide specialist educational opportunities within the CWU.

## **15. Monitoring and Evaluation**

It will be necessary to ensure that this strategy and its outputs are measured and reported, so that we can test if it meets our needs effectively. Therefore, we will build on the monitoring and evaluation that currently takes place to ensure that every course delivered is

evaluated and that we also follow up with surveys to randomised selections of reps who have attended any course, workshop or online offering post course at 6 and 12 months. This will help us assess whether the course is as current and relevant as required and also pick up any new or changing learning needs.