

UNION MODERNISATION FUND

Accord and Unite: developing union
reps within a partnership framework at
HBOS

JULY 2010

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Background

When the Accord and Unite Union Modernisation Fund (UMF) project started, HBOS was a FTSE 100 bank employing 65,000 people in the UK. HBOS, Accord and Unite had already signed a partnership agreement at a senior level. Through this agreement, Accord and Unite had been working on their business plans for ensuring that the bank maintained and improved its productivity and competitiveness in the global financial services market. Both unions needed to develop their capacity to support and train their reps in understanding the business and becoming more effective partners. UMF funding offered the ideal opportunity.

The project provided consultancy, training and support so the two unions could create and embed a good practice framework in partnership working, by developing a partnership training programme to embed the partnership approach with its trade union reps for the benefit of their members and the business as a whole - which was key to both unions' modernisation strategies.

Why this project?

In the economic climate and the particular challenges that face the financial sector, working in partnership between both unions and management becomes ever more critical in securing the best results for the business and its people. Ged Nichols, General Secretary of Accord, explains:

'The people strategy at HBOS is firmly focused on colleague engagement and

there is a general consensus that wider cultural and behavioural issues need to change in order for colleague engagement to be embedded across the business. The joint training programmes and the wider roll out of the partnership agenda will help develop an environment where these cultural changes can be addressed and moved forward positively and constructively. There is no doubt that organisations that rank in the top 100 are employers that treat their employees well – which is good for employees and good for the business. Accord, Unite and HBOS see partnership working as extremely important but neither union had the capacity or the resources to cover new areas of training. In addition, partnership skills are a specialist area that neither union could deliver, so external experts were engaged to design and deliver the appropriate training and a training programme, so that the unions could be self sufficient in the future.'

The partnership training programme focused on ensuring that relationships between the unions and the business were maintained and that collaborative working arrangements and structures were enhanced. It aimed to achieve:

- all employees of HBOS understanding the business needs of the company
- reps having a better understanding of their role within the business
- reps having improved skills in supporting their members and engaging with management

- better engagement of employees in the success of the business
- closer working between the two participating unions
- more effective dialogue with HBOS management about change
- an ongoing and sustainable partnership training framework

Methodology and outcomes

The project was divided into three key stages:

Stage One: Scoping

A total of 10 three-hour focus groups were held in London, Halifax, Edinburgh, Bristol and Wolverhampton, involving 68 participants – 50 union reps and 18 managers. In addition to the discussion generated at the focus groups, participants completed individual training needs analysis questionnaires and a diversity monitoring form. Ged Nichols explains:

‘The focus groups gave us some useful information about the culture and organisational context that would not usually have fallen out of a straightforward training needs analysis. It provided a useful benchmark against which the training programme could be framed. Analysis of the focus groups and questionnaires provided strong evidence to suggest that joint training between managers and reps would enhance and accelerate the roll out of partnership working across the business - and would be useful in terms of evaluating the overall impact of the partnership programme on cultural change at the end of the project.’

A report was produced from the findings, setting out recommendations for training in terms of content, configuration and duration. The report and recommendations were considered by the UMF Steering Group and it was agreed that a four-day programme would be piloted with reps only, covering the following modules:

- Introduction to being a partnership rep
- Representing your union at meetings
- Constructively challenging
- Business awareness

A two-day joint problem-solving module would also be piloted with managers and reps being trained together. This would result in a total of 45 union reps and 45 managers participating in the pilot programme – an increase in employees attending the training by 100% over the original numbers anticipated.

Stage Two: Piloting

The first pilot programme for reps was run in May 2008 in Edinburgh. Two others were held in Chester and Leeds. A comprehensive draft training manual with related materials and activities had been produced following the results of the focus groups. A detailed evaluation process was also designed, so that each participant could give feedback about every aspect of the draft programme at the end of each module. A group evaluation of the overall programme followed the final module.

37 trade union reps (22 from Accord and 15 from Unite) benefited from the training. Their experience and knowledge influenced the format, content and duration of the final

programme to be rolled out across the business. Says Ged Nichols:

'The added benefit was that reps from both Unite and Accord attended the training together, which meant they could work together and learn about each union's structure and the way they do things.'

He goes on:

'The aim was to get 45 reps onto the pilot training programmes but it proved difficult to release so many from the business at a time when the financial sector was experiencing challenging times as a result of the credit crunch. However, in spite of the shortfall by 17%, we were still able to get good quality information to conduct a robust review of this pilot programme. The joint problem-solving module attracted 69 participants (34 reps and 35 managers) and although that was 23% less than the target we had set, we had invaluable contributions from managers and reps in shaping the final programme. Given the difficult financial climate, we were pleased that we got as much as 77% of our target audience, as reps and managers were dealing with difficult issues in relation to their union members and line managed staff, often at very short notice. The added benefit of opening this course up to managers was being able to have reps and managers working together and sharing insights and perspectives; breaking down barriers between 'us and them'; and developing a shared understanding of partnership working and the benefits this way of working can bring for all parties.'

A subsequent piloting phase took place following the training for the in-house trainers, as part of the first phase of the wider roll out. This was

deemed important to ensure that there were no issues arising when the training was being delivered by the trained union reps that had not surfaced when the pilots had been delivered by external consultants.

As a result of the piloting phase, a number of minor amendments were made to the course material, after feedback from participants.

Stage Three: Implementation and evaluation

After the nine pilot programmes, there was a detailed analysis of participants' evaluation questionnaires. These covered each of the five course modules and sought feedback about each aspect of the programme. On average, some 94% of participants rated the components 'good' or 'excellent', with no module receiving less than 90%. Where a participant had rated a specific aspect as either 'very poor' or 'weak', further information was sought in order to understand the issue, and participants were also asked to indicate what might improve that particular element. A comprehensive report was produced and presented to the UMF Steering Group, where it was agreed that, based on the feedback and evaluation, the training to be rolled out should cover four modules and be for just three days, as follows:

- Day 1: Joint working in a partnership framework – reps and managers
- Day 2: Representing your members in a partnership framework – reps
 Constructively challenging - reps
- Day 3: Business awareness – reps

An **e-learning module** was developed by the HBOS Employee Relations team and reviewed and tested by the

Partnership Institute, as part of the pre-course preparation work for participants. This ensured that some of the material contained within the previous four-day programme could still be incorporated, and meant that all participants joined the programme with a baseline level of knowledge on partnership working and its benefits, trade unions, the difference between partnership and collective bargaining and the partnership agreement within HBOS. It had the added benefit of freeing up time to enable increased discussion and debate during the training programme itself.

As well as the valuable input which contributed to the final design of the training, there were other benefits:

- Observations and suggestions about how the partnership roll out was being experienced across the business and how aspects such as communication could be improved to promote the message more widely and effectively
- Ideas and solutions to ensure that partnership working is embedded across the business
- Action plans setting out what each manager would do back in their area of the business to promote partnership among their direct reports, colleagues and line managers
- The development of a network of managers keen to be more involved and who could be used to test out ideas and provide feedback to those overseeing the partnership roll out

The business also looked into the level of support that might be possible in rolling out the joint training programme between union reps and managers through their Learning and

Development department - another clear signal that, in Ged Nichols' words, *'this is not just a union initiative but a joint approach to encourage collaborative approaches to problem solving, communication and the development of strong and effective relationships between unions and management'*.

A detailed schedule of training for reps and managers was drawn up for the wider roll out from November 2008 and systems put in place to ensure its effective coordination across the business.

Training the trainers

The HBOS Learning and Development team provided useful input into a 'train the trainers' programme, which, says Ged, *'demonstrates the level of commitment that the company has to ensuring that union trainers are fully prepared to deliver this important training'*.

A training model suited to training trainers and to the material itself was agreed and the programme was evaluated and tweaked accordingly. The first 'train the trainers' programme was delivered in July in Edinburgh to five trainers from Accord and three from Unite. Says Ged Nichols:

'The original intention had been to deliver a three day programme but it was felt that a two day 'content overview' programme would be sufficient because union members being put forward were all used to delivering training. This was also a pragmatic decision to ensure that no more time out of the business was taken than necessary, to get trainers up to speed at this particularly challenging time for both HBOS and the unions.'

The second ‘train the trainers’ programme was delivered in London in August 2008 to 15 participants – 10 trainers from Accord and four from Unite. A member of the HBOS Learning and Development team also attended, to ensure that appropriate corporate support could be provided to the trainers as part of the wider roll out.

Further feedback was sought and amendments made to the course material following the two ‘train the trainer’ programmes. This included the addition of more detail to the tutors’ notes and a review of the location of certain elements of the programme to ensure a more cohesive flow of information. It was agreed that finalising the training manual should be left until the first roll out of the programme had been completed, in case there were further elements that could be improved in light of feedback from participants. All the trainers rated their confidence in rolling out the training following this programme as ‘good-excellent’.

The ‘train the trainers’ programme was also useful in highlighting improvements that were needed to the training manual and the overall programme – with just 73.27% of the elements being rated overall as ‘good-excellent’. Ged Nichols explains:

‘It became clear that adjustments were needed to the material to ensure that it was accessible to all participants, regardless of their level of understanding of partnership. However, it was also clear that some prior baseline understanding of partnership would considerably help participants’ learning and understanding and ensure that they

could get the best from the training programme itself. The development of the e-learning module filled this gap.’

Evaluation findings

A formal evaluation, an electronic survey sent to 180 course participants during June 2009, assessed the impact of the partnership training. Responses were received from 110 respondents – 51 managers and 59 trade union reps. Results were also compared with the initial review and diagnostic assessment undertaken at the start of the project during the focus groups and questionnaires in February 2008.

Results included:

- 20% more managers now believe that reps are better equipped to engage with strategic issues because they have a better understanding of the business; and 24% more union reps feel more able to engage with the strategic issues of the business.
- There has been a significant increase in managers’ perception of union understanding of the benefits that partnership can bring for the business – 63% more managers than when the project started believe this to be the case.
- In the February 2008 focus group questionnaire, just 22% of managers agreed that reps represent their union effectively at meetings with HBOS management. Following the partnership training, this had risen by 38% to 60% of managers now thinking that reps represent their union effectively at meetings with management.

- 64% of managers agreed in the evaluation survey that the partnership training programme had improved the way managers and reps work together, with 78% of union reps agreeing this to be the case.
- Almost half the union reps (44%) and managers (40%) now report effective working relationships between Accord and Unite.
- At a local level, 47% of managers and 56% of union reps feel better informed than a year ago about the changes taking place within the business and have been able to have a greater say in how change is implemented.
- A thoroughly piloted and evaluated partnership training programme is now in place and a wide roll-out programme has begun, with training being delivered by union reps, supported by the business through senior management and the Learning and Development team.

In addition, respondents gave evidence of how they are implementing what they have learned in their role at work, as a direct result of the partnership training.

Sustainability

Set against the backdrop where employee engagement is seen as the best way for businesses to survive the economic downturn, the company has been through significant and challenging changes during the period of the project. HBOS, Accord and Unite have used the considerable benefits to be gained from partnership working to steer a path through major

restructuring and downsizing programmes, both prior to and since the company was merged with the Lloyds TSB to form the Lloyds Banking Group.

The evaluation of the partnership training programme supports even further the value and benefits that partnership working brings to the business and its employees. When respondents were asked what needs to be done to develop partnership working further, there was an overwhelming call from both union reps and managers for the partnership training programme to continue and to be rolled out even more widely. Managers, for example, said: 'I believe having a standard framework which all reps and managers can work to is a positive move and will help the way both parties work together in the future', and 'I feel this needs to be rolled out to the business as a whole'. Union reps commented: 'I think with so much going on and the focus on "the journey" we need to keep partnership on the agenda as well', and 'All managers and reps need to go on it'.

Says Ged Nichols:

'The partnership training programme was designed to ensure that the company has a sustainable way of developing partnership working further through the use of its own staff and resources to roll out the training more widely. With this evaluation and the positive results that have been clearly demonstrated, the programme has strong support from senior leaders in Accord, Unite and HBOS and the staff who have already attended the training, who are clear about how partnership working should be developed further. Discussions are currently taking place with the senior team at Lloyds Banking Group about

partnership and the positive impact it brings to the business. Accord are also commissioning the Involvement and Participation Association to undertake an extensive evaluation and validation programme of the impact that the wider partnership programme has had on the business since the inception of this work and the formal signing of the Partnership Agreement between Accord, Unite and HBOS.'

Lessons learned

Following analysis of the feedback received from the pilot programmes, it was clear that the final course that would be rolled out across the business could reduce to three days, with the first day being a joint programme with reps and managers and the second two days being training for reps in partnership working.

The key reasons for this reduction were as follows:

- The e-learning module covered much of the background detail on partnership working, the HBOS partnership agreement and trade unions in advance of attending the course.
- Participants identified repetition in the first day for reps and the first day of the joint problem-solving programme, so the recommendation was to bring those two days together and run the course jointly with reps and managers.
- Shortening the joint course took into account the difficulties that managers, in particular, have in taking time out of the business, and responds to their comments that the course could be covered in one day. This is

particularly important as the course will be rolled out widely and it will be crucial to ensure that all staff can attend.

- Most participants were familiar with problem-solving techniques and there was an overriding view that there should be less emphasis on the techniques of problem solving and a reduction in activities.
- In terms of the reps' training, there were a number of comments that reps were well skilled in basic trade union skills, such as some elements of meetings, role play activity and interviewing members, so these elements of the course were removed.

The duration of the project was also reviewed because it was deemed more beneficial to roll out the training more quickly than originally planned given the difficult economic climate and the challenges facing the unions and the business. In the original bid, the project was scheduled to be undertaken over a two year period but was actually completed within eighteen months.

Conclusion

The project met its objectives and the outcomes have been gratifying, as Ged Nichols sums up:

'It is important to note that the commitment to rolling out partnership working has been sustained throughout the project in spite of the complexities of managing the merger of the business with Lloyds TSB and the additional pressures faced by both managers and unions as a result. The training has been very positively

received and there is now a waiting list of people who have expressed an interest in attending, as a result of the positive feedback they have heard. This is a significant achievement given the climate in which the training is being rolled out and testament to the value of the training in helping staff and reps to manage the changes that are currently taking place.

‘The resolve of HBOS, Accord and Unite to pursue partnership working through challenging times, a changing business and this project in particular, has not only remained steadfast but has been strengthened further on the basis of their conviction that the company is most likely to weather the tough market conditions by working in partnership across the business. There is clear evidence through the evaluation of the programme that the UMF grant has enabled Accord and Unite to make significant progress in developing and embedding the partnership approach with its trade union reps for the benefit of their members and the business as a whole. There is now a tried and tested partnership training programme in place, which has been rolled out to a number of reps and managers and which has been positively evaluated in terms of the improvements it has already brought to employee relations across the business. There is also clearly strong and unequivocal support for the partnership training programme to continue and compelling evidence already of the benefits that partnership brings to both the business and its employees. All the factors are therefore in place to build on the work already carried out, so that a sustainable partnership approach can be embedded even more widely, with the company joining the ranks of the many other organisations reporting

tangible improvements in business performance.’

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Department for Business, Innovation and Skills
www.bis.gov.uk
First published July 2010 © Crown Copyright
URN 10/986