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Unite the Union: Modernising
Management and Training - designing
a system of CPD

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Introduction

Unite the Union is engaged in a process of reform geared to becoming 'an organising union'. Achieving this involves a challenging process of change to working practices, systems and culture. In creating their modernisation strategy, the union identified several general areas of weakness in management. Jim Mowatt, Director of Education, explains:

'Often, there was little clearly defined purpose for activity. Accountability and measurement were weak or non-existent in some teams. There was a lack of effective leadership to drive strategic goals, and a lack of teamwork and central co-ordination meant that there was a need for tasks to be "routinised" and roles to be standardised. We also needed a greater strategic approach to partnerships and funding opportunities. Internal and external communication was sometimes poor: disparate parts of the union – both geographical and functional – needed to be better connected, and the union as a whole needed to be better connected with its members.'

Why this project?

Upskilling officers was therefore central to the union's programme of change, led by Unite Education. Unite Education has at its core the delivery of the union's policies, based on the three pillars of the Unite vision: organising, global solidarity and politics. This vision is reflected in their strategy for lifelong learning, in which the development of officers is essential in order to give the support that the membership needs and expects in moving forward in these three areas.

One crucial part of the approach to tackling these issues, therefore, was for new systems to be put in place for Unite officers to learn at work. Says Jim Mowatt:

'In order for reform of the union's approach to management to be effective, the introduction of modern business systems and practices needed to be underpinned by imaginative, negotiated and personalised training that is linked to the union's systems and flexible enough to meet the learning needs of individuals. The way this training is delivered and designed can make the difference between an enthusiastic and a sceptical reception to the changes. The challenge for Unite Education is to provide focused learning to ensure that officers have the required confidence, attitude and skillset to deal with workplace, national and international issues.'

The task for this project was to design a system of continuing professional development (CPD) around a set of key principles to ensure that Unite CPD:

- links clearly to the wider change programme within the union
- supports Unite's three pillars of organising, politics, internationalism
- is driven by the Unite vision and strategy but allows officers to identify their learning and development needs
- embraces all potential officer training and development the union provides across union departments such as HR, finance and education

- facilitates a process of developing a body of written (and so shared) knowledge and experience.

Jim Mowatt adds:

'Important as it is to provide officer training programmes that deal with learning in terms of a formalised, classroom-based activity, in which trainees interact with a tutor or trainer, they are only part of the story. We recognise that for officers, learning takes place in a range of different ways along a continuum that stretches from formalised activity at one end (for example a training course) through to a group of officers discovering the answer to a problem by informal discussion. Workplaces have always been sites of learning and every workplace creates its own unique version of a learning environment. For officers, the work context is often dispersed and day-to-day contact with peers minimal. This creates particular challenges and opportunities. For us, this project generated a valuable debate about how learning at work might be better organised and facilitated for the benefit of officers and the union, and as a contribution to lifelong learning.'

Methodology and outcomes

The project was focused on designing and piloting a CPD system for Unite that includes a contextualised management training programme for Unite officers, relevant to their actual job experience. The project comprised three phases: design/preparation, piloting and evaluation/embedding.

Design

Although the agenda for change facing the project was 'complex and daunting', the mechanics of how the project worked were relatively simple, as Mick O'Sullivan, Project Manager, explains:

'We sought to borrow and learn from developments in public value, quality of working life, learner voice/involvement strategies, expansive workplace initiatives, and internal brokerage. We then proceeded to fuse these strands to design and pilot an innovative programme firmly rooted in the union that would inspire and energise the management of change. The hallmarks of our approach were consultation, high trust levels and the flexibility to meet individual as well as institutional need.'

A number of external organisations identified as owning 'cutting edge' expertise or practice were invited to join union staff to develop innovative management training. Internal consultation and officer involvement helped make sure that training was meaningfully contextualised around the officer role. Concurrent initial activity involving Unite managers established consistency with Union modernisation policy and won 'buy-in' for structural reform already underway within the union.

The programme took a 'learner journey' approach to training, with the following features:

- Personalised needs-benefits analysis
- Assessment when ready
- Formative feedback
- Progress files and e-portfolios
- Adaptive, interactive learning environments
- Adapting to learning needs
- Personalised feedback and support
- Flexible courses, modes, locations and patterns of study
- Provider flexibility and online support
- Links to informal learning opportunities
- Access to advice and guidance

Says Jim Mowatt:

'This approach transformed the style and calibre of training currently available within the union. The project also trained a union CPD team in the new approach.'

A number of basic modules was designed around skills that the union had identified as 'core competences' for its officers:

- Planning
- Line management
- Team leadership
- Budget management
- Quality management
- Functional skills

Embedded in the content were the following basic principles:

- Planning is joint and learning is visible
- Planning allows continuity day to day and year to year
- Training responds to contingencies of learner development
- The trainees/learners are at the centre (The union carried out a survey of union officers, for example, involved learners in the design, and brought in expertise to help shape plan and deliver the programme.)

Piloting

The piloting stage involved a cohort of union officers completing the personalised programme using the new systems and processes developed by the project. The workplace research carried out by the Institute of Education concluded that 'to say that the work of the union officer is complex is almost an understatement' and that therefore the CPD needs of officers were extensive, due to several factors:

- the diverse range of contexts in which their members work
- the relationship of those contexts to the broader economic landscape

- the jobs members do and the way work is organised in different workplaces
- the diverse range of needs and concerns that union members bring to them
- employment law and related legal areas
- the areas covered by other unions and the overlaps with Unite
- the evolution of their respective prior unions.

The findings of the officer survey supported this. However, it was apparent that within this complex picture, there were three main 'hotspots' that needed addressing. The CPD pilot programme was constructed around these: leadership, organising and team building.

- **Leadership**

The programme was designed to give officers the skills required to produce results effectively through other people, and to make that process into one that is straightforward and productive for both leader and team. As Jim says, *'Officers need to be leaders and require excellent people skills. They have to learn how to balance the demands of their own teams with other teams they link with and with their operational workload.'*

- **Organising**

The programme introduces officers to the skills of organisation. It helps them, for instance, assess how to make the best of the working day and find out why greater communication means greater organisation. It explores 'smarter goal setting' – how you identify what goals are necessary, possible, and agreed – and it helps participants discover the keys to successful planning, showing them how to handle tasks that have to be completed in a certain time frame.

- **Building teams**

Officers on the programme are introduced to team building, learning the differences between a team and a group. Learners also explore the principles and phases of team development, picking up some useful strategies for team development.

Networking

Survey findings around how officers learn, and the importance of networking, were of major importance to the programme. Says Jim:

‘While our understanding that there was a need for a range of different types of training was confirmed, received assumptions that officers were not particularly interested in using IT to learn or communicate with each other were proved incorrect. The survey found that mechanisms for sharing practice were informal and sub-regional in character. We identified the existence of self organised officer networks where an interchange of views and ideas takes place. We also found there was widespread use of the internet as a method of finding information and “learning” about issues. None of the officers we met with recognised what they were doing as learning – “It’s just what we do to survive.” We came to recognise the extent to which officers’ expertise is largely developed through everyday work activity. Officers acquire deep knowledge about the problems faced by their members and the workplaces they inhabit through the variety of situations and people they confront on a daily basis. This is also how they learn to cope with the stress of the job, as well as gaining the tactical skills to adjust and adapt to each situation. At the same time, they develop deeper knowledge about their roles through practising their skills over and over again. So in designing the CPD programme for them, we tried to make sure it could support and facilitate this social networking, reflective and “tacit” learning taking place informally. We

did this through developing the online CPD Moodle as a space to network and share practice, and through a pilot “group project” with bus officers. To be effective and credible, the CPD programme needed to be built around opportunities for officers to weave ideas, strategies and knowledge into their everyday work practice so they could try them out and test them against the realities of the job. The group project with bus officers set out to do this.’

- **The group project pilot**

The group project pilot took a problem-based learning approach. The group examined the complexity of real situations and current problems that bus officers have to deal with, through active group-based problem-solving exercises. The officers worked together on a project that they helped plan and which was based in the context of planning a real campaign taking place across London bus companies. As a result, the group reported that they had learnt how to plan as a group, not individuals, and how to take a strategic approach to the campaign.

- **The CPD Moodle**

Moodle is the short name for Modular Object-Oriented Dynamic Learning Environment. The online CPD Moodle is open to officers and the CPD team and is for officers to use as a personal space for planning, recording and organising their professional development. Jim continues:

‘It should be seen as the hub of the officer’s continuous professional development. We’ve divided it into themes or sections. Some provide the officer solely with information but most of this space is in one way or another interactive. Indeed, for it to work it needs the active participation of officers. Officers can do this through discussion forums or, for example, by helping to update the library section. The final and perhaps the most important part of the site is what is

directly related to the CPD process. Officers complete their training needs analysis (TNA) on this site, filling in the CPD plan, which identifies three forward steps (the areas of their work they have identified for development) for the year. As well, they can download evidence of any learning undertaken and add it to their CPD record. Unite views this space as central to realising officer CPD and part of this is facilitating officers' ability to exchange views and ideas. Neither the union nor the CPD team is concerned to police this site in any way, other than to ensure that those participating remain within the bounds of common decency.'

- **Officers' library**

In the survey of officers, the union found that an issue for many was the question of where to find information, while for the CPD team a further concern was the lack of scope for officers to share information and knowledge. One of the ways proposed to resolve these issues was through the development of an officers' library, as Mick explains:

'The idea of the library is a simple one. We want to enable officers to share information and to find as much information as possible in one place. Technology provides us with the means of doing this and the CPD team has begun to develop space on the Moodle. While the eventual shape and scale of the library will be one which can only be determined in conjunction with CPD stakeholders, the CPD team have found that some basic principles are discernable.'

The library will house the following types of information:

- Document/web links - national rather than regional or workplace and including internal Unite policies, legal documents and national agreements
- Briefings - notes providing a background brief for officers on

a specific issue or concern. For example, a brief explaining core/periphery workforce. Briefings might be generated externally by, say, a barrister, or internally by an officer or staff member, like the research department.

- Best practice - generated solely by officers, it will provide them with information, advice and guidance on how best to deal with an issue – like how to annualise hours, or negotiating
- How to - very similar to best practice but concerned with how to undertake things like putting together a PowerPoint presentation. Most of these will link to short videos.
- Living documents and forums - much of the best practice will over time become dated, so needs to be changed and updated (hence the term 'living'). Only officers will be able to do this. They will be using the best practice to support them in their work, so will know best what works and what needs amending. The forum enables officers to post on a particular issue, so enabling it to be updated.

- **Mentoring**

Traditionally, mentoring is the long-term passing on of support, guidance and advice. In the workplace, however, it has tended to involve a more experienced colleague using their greater knowledge and understanding of the work or workplace to support the development of a more junior or inexperienced member of staff. Jim adds:

'It's also in some ways a form of apprenticeship, whereby an inexperienced learner learns the "tricks of the trade" from an experienced colleague, backed-up as in modern apprenticeship by offsite training. When we were designing the CPD system, officers continually told us

they felt the need for a mentoring scheme to be included. So mentoring will be used specifically by Unite CPD as a form of tailored development for the individual, which brings benefits to the organisation.'

The characteristics of Unite mentoring for officers are:

- It is essentially a supportive form of development.
- It focuses on helping an individual manage their workload and improve skills.
- Team/member issues can be discussed more productively.
- Mentoring activities have both organisational and individual goals.

The model has three stages: exploration (exploring issues identified by the mentee), new understanding, and action planning. In each stage there are responsibilities for both the mentor and the 'mentee'.

- **Advocacy**

In addition to the mentoring programme to support officer development, the union wanted to find a way of capturing the experience of the 30-40 officers who took part in the pilots, to 'spread the word' about CPD within the union. CPD advocates will therefore – through formal and informal, face-to-face and online channels – be able to explain to other officers what CPD is about, what the benefits might be and what their experience of it has been.

Evaluation and embedding

The evaluation/embedding stage, which is still live, focuses on embedding a sustainable continuation of the programme into union functions. Mick adds:

'Part of this debate is around the role of technology in today's workplace. The Moodle will not only provide accessible resources for officers, mentors and tutors but will house all

the online CPD processes and procedures, making them as pain free as possible. Most importantly, the Moodle will become the main platform by which officers share practice, knowledge and experience around areas of expertise/specialism.'

Benefits

The project could not have been as extensive or bespoke without the UMF funding, as Jim explains:

'The UMF element bought the design/preparation/development phase, which could be seen as a luxury and would be beyond the normal union budget but which we argued was essential for sustainability and successful mainstreaming. This phase enabled us to:

- *examine the principles and roles of union structures, including the leadership and management functions shared between officers and those of regional and national committees/officials*
- *investigate the purpose of strategic planning in the union and how it links to operational activities, using a planning framework that takes into account organisational aims and objectives, as well as financial and performance monitoring*
- *explore a range of methods to engage and motivate staff*
- *foster a confidence around engaging with and collaborating with external practitioners and industry*
- *initiate real debate about the form and content of a sustainable CPD programme for officers*
- *establish a model of good practice for involving stakeholders in the design of union training programmes.'*

There have also been considerable benefits for officers. Those who took the training, for example, reported:

- greater motivation
- increased team working and team spirit
- better awareness of team dynamics
- relationship building
- stronger shared vision around union goals
- increased problem solving skills
- enhanced trust of each other
- increased personal confidence.

One officer wrote, for instance:

'I thought [this training] was exceptional. It was done in a way which was clear and obvious as what you needed to do and why you needed to do it. So I gained a lot from it. The most important thing for me was that it has helped me understand in a very clear and defined way the people I work with. It has allowed me to know how to work with them because I now understand their character types and what I need to do to get the best from them. It has made my work a lot easier as the getting to know people is a lot shorter and with it, finding out about what they will and will not do, giving them the confidence to move on and do other things - all of this is a lot, lot quicker. I would like to go on to undertake some project working.'

The project represents a potential major benefit for the wider trade union movement, as Jim describes:

'By developing a contextualised training package, linked to our wider change agenda, we will have provided other unions with both a methodology around how to upskill officers and a road map for overcoming barriers to change. We envisage sharing and extending this knowledge through

dissemination forums, publications and consortium approaches.'

Lessons learned

The following lessons were learned:

- The added value provided by the project *'comes largely from the externality which it buys. The programme is not exclusively internally driven – stakeholders at all levels will receive support, advice and training from outside professionals brought in to provide current business updates and to challenge some of the institutional norms and cultures that are barriers to change. This externality will ensure that best practice is held at the core of the programme and not submerged by internal expediencies.'*
- The appointment of a .5 co-ordinator dedicating half their time to the project, with sole responsibility for achieving project objectives, is a valuable addition. *'Without it, the project would be managed by union staff with competing claims on their time. Even with all the best of intentions, the project might not have got the profile and priority it deserves. It is envisaged that the "other half" of the project co-ordinator's role in the union will be change management on other modernisation activity, focusing on reforming union systems. Hence the co-ordinator will be able to link with the union teams and systems in which the training is to be contextualised.'*

Looking ahead

The project is gathering momentum:

- The CPD team intends to tour the regions along with CPD champions (officers who have been involved in the project) explaining how the CPD system works.
- Education officers will be trained on their role within CPD and officers will be given training on how to use CPD software.
- A call is out for officers who would like to become officer mentors or coaches, who will also be trained in that role.
- Developing the library is a major project in its own right and will remain a work in progress for some time, with substantial benefits for officers.

For more information, contact

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Conclusion

Mick sums up:

'We do not expect this project to address or solve all of the issues. Change to systems, culture and practice will take time and greater resources. However, this project can contribute to a broader programme of change through providing a contextualised and effective training element. When it comes to professional development, we are proud that Unite is willing to "put its money where its mouth is", providing CPD opportunities that are easily accessible, cater for differing learning styles and are available all over the UK and Ireland. This can only empower officers to "win in the workplace", successfully campaign, organise for growth, and promote dignity and respect.'

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