

THE LEARNING AGENDA

UNITE
LEARNING
FINANCE SECTOR
JOINT INITIATIVE

Endorsed by National Finance
Sector Committee

16th April, 2008



Background

1. On January 11th, UNITE, Unionlearn and the Alliance for Finance held a successful seminar on how Unions and employers can work together in conjunction with the Financial Services Skills Council (FSSC) to move the skills agenda forward in the Finance Sector: a key element of which is the Sector Skills Agreement and an Action Plan. The contributions from Govt, TUC, the FSSC, employers, Union Learning Reps and UNITE highlighted the importance of this shared cross sector agenda. The time is opportune to take stock and consider how the National Finance Sector Committee (NFSC) can ensure learning and skills are at the forefront of the bargaining agenda across the Sector. Such a review would be consistent with the Trade Union Action plan for the FSSS Skills Agreement which states that:

“for Unions to fully play their part in the delivery of the SSA, it is essential that there should be an understanding with the FSSC on a general set of working principles that will provide a framework for ongoing collaborative work”.

2. It is also worth repeating that the FSSC is committed to working with and promoting the role of the trade unions and the promotion of the principle of joint working on learning as a model of good practice.

Purpose and Objectives

- 3 This discussion paper attempts to summarise why Learning and Skills should be at the heart of our bargaining agenda. It does not attempt to provide a

blow by blow account of existing activity – those speak for themselves, nor does it attempt to duplicate the FSSC, UNITE, Unionlearn discussions in securing an Agreement for skills in the Finance Sector. More importantly, this paper attempts to highlight the need for the NFSC to take ownership of an integrated learning strategy and secure its implementation on a cross sector basis. At the outset there is a need to clarify the terminology. Graham Goddard, Deputy General Secretary, has encouraged us to ignore the false distinction between learning and skills – they should be seen as one and the same – and the Finance Sector of UNITE is in a pole positions to demonstrate this and translate it into action. The strategy should have measurable goals and a campaign timetable. The NFSC may wish to consider declaring 2008 - The Year of Learning.

NFSC ACTION POINTS No 1 - 3

- 1. That the NFSC declare 2008 as a Year of Learning, commit to a cross sector learning strategy and timetable for action.**
- 2. That the NFSC takes ownership of the strategy throughout timetabled report backs from National Company Committees and relevant officers, ULR's and workplace representatives.**
- 3. That the NFSC reaffirms its support for the role of the FSSC and mandates negotiators to raise awareness of the FSSC amongst employers and commit to the Sector Skills Agreement.**

Why place such importance on Learning?

4. In opening the FSSC Seminar, John Earls, Research Sections Head pointed out that learning has always been part of the trade union agenda. Clearly the Sector already has beacons of excellence in demonstrating a commitment to learning examples of which are:
 - The closure of the Newcastle LTSB call centre led to an agreement containing innovative features such as training bonds, training and development of ULR,

working with learning partners and the development of further ULR project in Glasgow, Newport and Manchester. The Learning agenda turned a negative into a positive.

➤ The ULR of the year was Nikki Simpson, lately of the RBOS.

5 Not only does the Learning Agenda present an opportunity for further cross sector working but also enables us to promote and reinforce our distinctive role. Only UNITE is able in the Finance Sector to make the link between learning and aspiration, social exclusion and economic deprivation. Learning is a keystone issue.

6. David Lammy, MP, Parliamentary Under Secretary for Skills stated that the challenge posed by upskilling cuts to the heart of what society we want to be; equitable opportunity for all. It is estimated that by 2020 over 40% of UK jobs will need to be degree equivalent and above and that many of these will have to come from the 70% of the 2020 UK workforce who are already in employment now. This presents us with an opportunity through upskilling to tackle the demographics of social exclusion releasing disadvantaged groups from jobs with limited aspirations; imprisoning women and ethnic communities. This is starkly evident in Canary Wharf where extremes of wealth sit side by side with economic deprivation in the surrounding communities.

7. There are also joint opportunities to identify joint agendas with employers although as pointed out in LTSB this:

“must involve both the TU and the employer acknowledging that each other has at the same time different and complementary agendas and objectives”.

8. Brendon Barber of the TUC has reinforced the importance of the sector skills approach to the finance industry. *“Financial services have been the powerhouse of the British economy in recent years. But we can’t afford to be complacent. The finance sector relies heavily on high-level skills and unless we can meet this demand we will lose our world-leader status”.* The finance sector has grown by 5.5 per cent a year since 2002 and currently accounts for eight per cent of GDP. The industry now employs over a million workers. Despite the progress, a recent Treasury review of City competitiveness warned that the financial sector is vulnerable to

offshoring. The latest report from the Financial Services Sector Council (FSSC) also highlighted critical skills needs across the sector.

9. The learning agenda resonates with younger members in account of the aspirational focus. The TUC's Manifesto for Young People estimates that 14% of 16-25 years olds work in the banking, insurance and finance and there should be a strategic effort to ensure high quality training tailored to individual needs.

10. David Lammy also emphasised the deep emotional commitment that results from those who engage in upskilling and the enormous sense of validation and self-esteem that result from learning regardless of age.

NFSC ACTION POINTS No 4 - 6

4. That the learning agenda is pursued on a cross sector basis with a commitment to share best practice.
5. That the learning agenda is also seen as a vital component in addressing equality and social exclusion.
6. That the learning agenda be seen as keystone issue which underpins all other activity.

What shape should the Learning Agenda strategy take:

11. The learning and skills agenda presents opportunities for us both industrially and organisationally:

12. The acquisition and recognition of relevant skills is central to continued employability, job security and career progression for our members. Tackling these issues as part of the bargaining agenda allows us to work proactively on our members' behalf. Contrary to what might be expected, the Sector Skills Agreement is not an agreement by employers to address the skills needs of

their workforce and does not commit employers to any action on learning. We therefore need to take learning to the bargaining table if we expect anything to change.

13. Workplace activity providing members with access to quality, relevant learning opportunities raises the union's profile. It is overwhelmingly seen positively by members and potential members (particularly young workers) alike, adding value to the union card. It is also an area that few of the independents or staff associations have any capability to deliver.
14. Union Learning Reps play a crucial role in raising informed demand for learning, removing barriers to participation and ensuring equality of access; they are fundamental to successfully organising for learning. The role is attracting a higher proportion of female and BME members who are interested in a different (though not necessarily easier) activist role. ULRs provide another layer of organisation and visibility for the union and we are entitled to elect / appoint ULRs wherever we have recognition agreements.
15. Lifelong Learning Department has produced a model Learning Agreement that negotiators can use as the basis for establishing dialogue with employers and setting up ULR networks. The Department also has a team of Regional Learning Organisers nationwide, who can help and advise negotiators, and support ULRs. However, it is vital that ULRs are integrated into the union's organisational and democratic structures, and that learning is situated within the mainstream of the industrial agenda.
16. Despite the valiant efforts of particular learning enthusiasts there are areas where the learning agenda is not high on the agenda. This could be because of other competing issues, job losses or a disinclination to see the issue as a top priority or indeed as a part of the TU agenda. Nevertheless, Unite Deputy General Secretary, Graham Goddard has said:

“Unite has long argued the importance of raising the skills level of all employees in the financial services sector, in order for the workforce to be able to compete on the world stage. Employees are without doubt an organisation’s greatest asset and the skills implications of the globalisation phenomenon are considerable. It is vital that workers are given the opportunity to enhance their qualifications – only then will this country will be able to maintain a competitive edge. Unite will continue to campaign for organisations to take a long-term view of training and skills development, only then will employees have the opportunity to make career choices in a rapidly changing employment”.

17. The strategy must therefore provide a template itemising those issues which need to be addressed. Consistent with the FSSC Skills Agreement blueprint there should be an inventory of learning provision within the Finance Sector of Unite and dialogue with employees which takes account of:

- An Assessment of current and future skill needs
- What learning will drive and sustain sector growth?
- An Assessment of current provision by both UNITE and employers
- What training is used, why and by whom?
- An Analysis of gaps and weakness
- An Assessment of the scope for collaborative action
- To what extent is there already discussion/consultation with employers over a learning agenda?
- Do employees and UNITE have a shared understanding of what the Learning Agenda looks like?
- Is the Learning Agenda clear as to the Sector Skills Agreement what exactly are we asking employers to do?
- Is it possible to quantify the value which education brings?

18. In order to drive through this agenda the NFSC may wish to delegate the implementation of the Learning Agenda to the Strategy Group augmented by interested parties. Clearly the role of ULR’s is key to the success of any learning agenda. The NFSC Strategy Group may wish to consider targeting employers with a view to the strategy being rolled out in phases. As examples First Direct and NAG would be good targets where we have yet to get agreements but that have good potential. Nevertheless there should be a strategic goal to move away

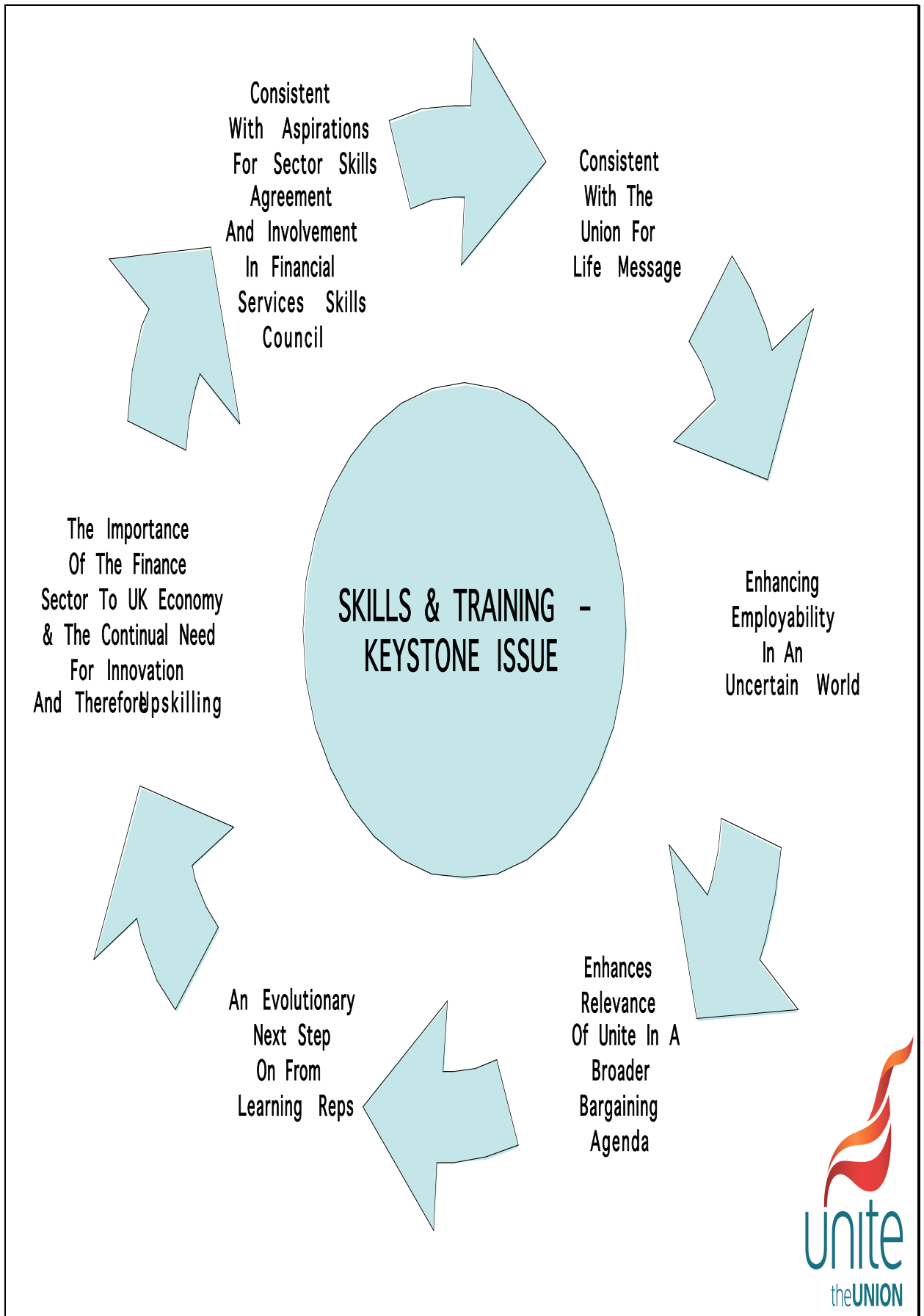
from the relatively small scale "pilot" activities in the major employers into a more national approach - Barclays would be a major coup from this perspective.

NFSC ACTION POINTS No 7 – 10

- 7. That in conjunction with Learning Department we commission a sector audit of all learning activity.**
- 8. That NCC and negotiators are mandated to engage, if not already in meaningful dialogue on the Learning Agenda with employers with a view to securing Learning Agreements; a baseline of what we would expect as minimum standards.**
- 9. That negotiators promote the Sector Skills Agreement with each employer.**
- 10. That (NFSC Strategy Group) monitor progress throughout the year of Learning in 2008 and execution of the aforementioned Action Points.**

NFSC ACTION POINTS No 1 - 10

1. That the NFSC declare 2008 as a Year of Learning, commit to a cross sector learning strategy and timetable for action.
2. That the NFSC takes ownership of the strategy throughout timetabled report backs from National Company Committees and relevant officers, ULR's and workplace representatives.
3. That the NFSC reaffirms its support for the role of the FSSC and mandates negotiators to raise awareness of the FSSC amongst employers and commit to the Sector Skills Agreement.
4. That the learning agenda is pursued on a cross sector basis with a commitment to share best practice.
5. That the learning agenda is also seen as a vital component in addressing equality and social exclusion.
6. That the learning agenda be seen as keystone issue which underpins all other activity.
7. That in conjunction with Learning Department we commission a sector audit of all learning activity.
8. That NCC's and negotiators are mandated to engage, if not already in meaningful dialogue with employers on the Learning Agenda with employers with a view to securing Learning Agreements; a baseline of what we would expect as minimum standards.
9. Those negotiators promote the Sector Skills Agreement with each employer.
10. That the NFSC Strategy Group monitor progress throughout the year of Learning in 2008 and execution of the aforementioned Action Points.



SPOT THE QUOTATION?

“Employees are without doubt an organisation’s greatest asset and the skills implications of the globalisation phenomenon are considerable. It is vital that workers are given the opportunity to enhance their qualifications only then will this country be able to maintain a competitive edge

“They should be seen as one and the same and the Finance Sector of UNITE is in a pole position to demonstrate this and translate it into action

“The challenge posed by upskilling cuts to the heart of what society we want to be, providing equitable opportunity for all ”

“Financial Services have been the powerhouse of the British economy in recent years. But we can afford to be complacent. The finance sector relies heavily on high level skills and unless we can meet this demand we will lose our world status

“Unite has long argued the importance of raising the skills level of all employees in the financial services Sector, in order for the workforce to be able to compete on the world stage”

“The time is opportune to take stock and consider how the NFSC can ensure learning and skills are at the forefront of the bargaining agenda across the Sector



Skills

FOR BUSINESS

The call to action is clear. For the future prosperity of the UK the best economic policy is a sound and farsighted education policy. In a rapidly changing world, we must seek changes which will develop the skills of the UK workforce at all levels. The alternatives are wasted individual talent and national economic decline.

THE WORLD ECONOMY IS UNDERGOING ITS BIGGEST ECONOMIC RESTRUCTURING SINCE THE RISE OF THE UNITED STATES. FOR EXAMPLE, BY 2015 THE CHINESE ECONOMY WILL NOT ONLY BE AS LARGE AS THAT OF THE UNITED STATES BUT LARGER THAN ALL 27 EU MEMBER STATES COMBINED.

Such Global economic forces are driving up UK skill requirements by 2020 we'll need 4.5m graduates: up from 250,000 a year now to 520,000. These will have to come from the 70% of the 2020 UK workforce who are already in employment now.

A high-wage economy producing high value-added goods and services means strong demand for skilled adaptable, committed and productive employees.

BY 2020 OVER 40% OF UK JOBS WILL NEED TO BE DEGREE EQUIVALENT AND ABOVE

Employers hold the key to creating the high skills environment which the UK needs for a knowledge based economy. And more and more employers are stepping up to the mark and working with their Sector Skills Councils (SSCs) to achieve this.

SO SHOULD WE!





Amicus Section

Lifelong Learning Agreement
Between

.....

&

Unite - Amicus Section

Partners

.....

Unite-Amicus Section Trade Union

Aims

- To build a learning partnership between and **Unite-Amicus Section**
- To encourage employees into participate in lifelong learning
- To provide access to lifelong learning
- To establish a workplace learning centre where appropriate
- To build upon the Government’s current lifelong learning initiatives
- To work with learning organisations and providers to ensure that the partnership is a success and that learning opportunities are available to all staff

Who the Agreement Covers

This agreement covers all full and part time employees of

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The employer will undertake to ensure that this agreement will not be used as an alternative to collective bargaining with Unite-Amicus Section and agrees to maintain

and use existing negotiating procedures and arrangements other than those specified in this agreement.

The partners agree that all individual grievances arising from any educational or learning initiative shall be subject to the existing grievance procedures.

The Establishment of a Joint Union Employer Learning Partnership Committee (LPC)

The Partners agree to establish a joint union/employer Learning Partnership Committee, which will be responsible for introducing, implementing and monitoring learning initiatives.

The main responsibilities of the committee will include:

- Identifying the learning needs of the staff through a Learning Needs Analysis
- Prioritising learning needs
- Identification of those groups and individuals who are to benefit from the various learning initiatives
- Producing a realistic learning plan, setting goals and targets for the learning provision within the workplace; which will include establishing a learning centre where appropriate
- Establishing the standards for the learning to satisfy individual and statutory requirements
- Agreeing upon and establishing time off for learning for all employees wishing to participate in learning
- Determining and monitoring of the provisions available

- Maintenance of any contracts with outside education and training providers
- Ensuring that the Learning Plan is effectively implemented so that the LPC meets their goals and targets for learning provisions

The partners agree that any learning needs analysis is undertaken with the full cooperation of all partners and that any such analysis will be solely for learning and educational purposes. The analysis will not be used in relation to other issues such as pay, performance appraisal, redundancy, disciplinary procedures etc.

The partners commit to regularly updating the learning needs analysis of participants in any learning programme.

The LPC will comprise of equal numbers of Employer and Union representatives and the employer will place at least one senior member of its management team on the joint LPC, so that the committee is able to take effective decisions.

The partners agree to ensure that all sectors/sites of the workplace are represented equally on the joint LPC and that all members of the LPC are provided with all relevant information concerning the learning provision and their duties/responsibilities as members of the committee.

The partners will have the responsibility of disseminating all information on matters relating to learning in the workplace and will ensure that all employees and managers are made aware of the learning opportunities available, the work of the LPC and the role & responsibility of the learning representatives.

The LPC will meet once a month (or as agreed by a meeting) to carry out the tasks as identified by this partnership agreement.

A Chairperson and Secretary will be appointed at the first meeting of the joint LPC and once a year thereafter, to facilitate the future meetings of the committee.

Equal Opportunities, Equal Access

The partners recognise the importance of equal opportunities and equal access to enhance skill levels in order to meet both the business objectives of the organisation, as well as the individual learning and development needs of the employees.

The partners will ensure that training and development will be provided to all employees.

The LPC will:

- Make every effort to ensure that when any learning takes place, the specific needs of individual employees are taken into account.
- Ensure that a reasonable number of members from within the workplace are given the opportunity to train as learning representatives, enabling them to offer support, advice and guidance to other members.
- Ensure that Learning Representatives have adequate paid time off for training and to do their duties, as outlined in The Employment Act 2002 and ACAS Code of Practice (*Time Off for Trade Union Duties & Activities*) 2003
- Ensure that employees are entitled to time off to participate in learning and events and to access their learning representative.
- Ensure that development plans for each individual employee are drawn-up for the purpose of meeting job-related learning needs.
- Ensure that learning representatives have a secure office with the usual office equipment, i.e. computer with internet connection, internal & external email, secure filing cabinets and a telephone with an external connection. This is necessary to enable learning representatives to conduct confidential interviews, give impartial advice and guidance, and securely store information.
- Assist the individual/employees/learning representatives to make informed choices in regard to learning programmes; giving those concerned the ability to secure the maximum benefits possible from the opportunities available.

It is Unite-Amicus Section's responsibility to elect, train and develop learning representatives. Learning representatives will be elected according to the Unite-Amicus Section's rule book. Unite-Amicus will inform management in writing of the names and workplace/departments/site of learning representatives, including his/her intention to train.

Although participation by employees will be on a voluntary basis, Unite-Amicus Section agrees to actively encourage their members to fully participate in all learning initiatives and opportunities, developing a lifelong learning culture throughout the company.

Skills Pledge

On behalf of [organisation name] I, as Chief Executive/Chief Operating Officer [or other Board Member] , make a commitment that we shall:

- Actively encourage and support our employees to gain the skills and qualifications that will support their future employability and meet the needs of our business/organisation
- Actively encourage and support our employees to acquire basic literacy and numeracy skills, and with Government support work towards their first Level 2 qualification in an area that is relevant to our business/organisation
- Demonstrably raise our employees' skills and competencies to improve company/organisation performance through investing in economically valuable training and development.

Signed on behalf of Unite-Amicus Section

Date.....

Signed on behalf of

By

Date.....