Learning for Life: Toolkit
Part of the Social Partnership Forum’s Learning for Life campaign, this toolkit has been designed to help you develop new workplace learning initiatives and refresh existing activities within your organisation – to the benefit of all NHS staff.

We want to:

- stimulate greater awareness and increased participation in learning at work for all NHS staff, especially those in Bands 1–4
- increase recognition by chief executives and board members that supporting the development of staff makes good business sense
- reinforce belief that investment in staff learning is an investment in the service
- increase the proportion of NHS staff who agree that workplace learning has had a positive impact on the quality of their work.
User guide

This toolkit is a ‘click and go’ guide that enables you to find the information you want on specific topics quickly.

The contents page shows what each section of the toolkit covers. Click the section you want and you will go straight to it.

To help you navigate your way around, there are a number of clickable buttons that take you back or forward to set places in the toolkit:

- takes you to the contents page
- takes you to the user guide page
- takes you to the start of a section
- takes you to an item within a section
- takes you to an external website
- takes you to an internal link
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Section 1: Getting started

What is workplace learning?
Organised in or by the workplace, workplace learning supports people in their personal development, their work role and their career progression. Workplace learning can be formal or informal and can be delivered in a variety of formats, including conventional classroom-based teaching, online courses, books, mentoring, shadowing, group discussions or reflective practice.

Why is it important?
Learning in any form can help increase productivity, innovation and staff engagement. When people at all levels in your organisation are given access to learning it can encourage them to operate in new ways and change old habits, resulting in more efficient ways of working.

This positive outcome is best achieved by giving staff the confidence and the opportunity to access the learning and development they need, in a way that suits them.

The 2012 NHS Staff Survey revealed that only 40 per cent of staff felt their organisation valued their work. This suggests that whilst the NHS has a good overall record on training, access to training could be improved, especially for those staff in Bands 1–4.

Workplace learning initiatives, especially when supported by learning agreements with trade unions, can help harness new energy and resources, which in turn can lead to significant improvements in the organisational efficiency of your workforce.

✔️ if you need to do some persuading at the top level.
✔️ if you want to develop a learning agreement.
✔️ if you would like to find out about what others are doing.
✔️ for help in demonstrating the benefits.
✔️ if you want to find out more about available resources.
Section 2:

The business case and how to make it

**Persuading the board**
There are plenty of reasons why we should embrace workplace learning:

1. Workplace learning improves patient safety
2. Workplace learning helps engage staff and boost morale
3. Learning and development budgets go further
4. Workplace learning creates a culture of learning
5. Workplace learning creates a workforce that attracts and retains the best and better reflects the local population
6. Workplace learning delivers on staff pledges in the NHS Constitution
Section 2: The business case and how to make it

1. Workplace learning improves patient safety:

- staff must be competent, skilled and adequately trained
- learning is key to raising standards
- helps ensure patient safety is at the heart of your organisation
- helps with implementing the recommendations of the Francis report, Cavendish review and Keogh report
- it can be a quality control mechanism for employers.

See also:

- NHS Employers response to Francis report.
- NHS Employers response to the Cavendish review
- NHS Employers response to the Keogh report

See especially:

Page 85 – **Putting the patient first** – this talks about putting the patient first and that the NHS Constitution should be the first reference point for all NHS staff.

Page 101 – **Medical training and education** – this includes recommendation 172: proficiency in the English language.

Page 105 – **Nursing** – includes practical, hands-on and consistent training, standards of appraisal and support.

Page 100 – **Caring for the elderly** – communication with and about patients.

Section 2: The business case and how to make it

2. Workplace learning helps engage staff and boost morale:

- more commitment
- better job satisfaction
- improved performance
- good team workers who go the extra mile
- makes the most of existing staff
- encourages retention and career development
- staff could get a formal qualification.

See also:

- Next Generation HR, CIPD 2012.
- NHS Employers staff engagement toolkit.
- NIACE survey of Unison members 2011.
- Treetops Hospice case study.
- Appendix 1: Learning for life campaign – business case summary
Section 2: The business case and how to make it

3. Learning and development budgets go further:

- union learning representatives (ULRs) support staff in their learning and encourage them to access learning opportunities
- access to external learning resources such as unionlearn and the Union Learning Fund
- more efficient coordination via learning committees
- access numerous sources of public funding.

See also:
∪ Unionlearn
∪ West London Mental Health NHS Trust case study.
∪ Bridges to Learning case study.
∪ Learning and development support.
Section 2: The business case and how to make it

4. Workplace learning creates a culture of learning:

- helps embed learning within your organisation
- supports achievement of strategic workforce development goals
- encourages organisations to measure the success of learning activities
- encourages the use of appraisal, personal development plans and the Knowledge and Skills Framework (KSF) to define learning needs.

See also:

- Michael West: Developing cultures of high-quality care.
- NIACE survey of UNISON members 2011.
- Guy’s and St Thomas’ NHS Foundation Trust case study.
- Nottingham University Hospitals NHS Trust case study.
Section 2: The business case and how to make it

5. Workplace learning creates a workforce that attracts and retains the best and better reflects the local population:

- compete effectively in the new commissioning environment
- demonstrates to commissioners you have the right staff with the right skills
- achieves flexibility and sustainability in workforce supply.

See also:
- Nottingham University Hospitals NHS Trust case study.
- Cambridge University Hospitals NHS Foundation Trust case study.
Section 2: The business case and how to make it

6. Workplace learning delivers on staff pledges in the NHS Constitution:

- provides staff with personal development opportunities
- provides staff with access to appropriate education and training
- supports line management to help staff fulfil their potential
- enables support and opportunities for staff to maintain their health, wellbeing and safety.

See also:
- NHS Constitution.
- Appendix 1: Learning for Life campaign – business case summary.
Section 3: How to embed workplace learning

To be successful, workplace learning needs investment. This section gives you some tips from other NHS trusts that already have a strong culture of learning within their organisation.

1. Ten top tips from those who are doing it
2. What union learning representatives do and what they can do for you
3. Developing a learning agreement
Section 3: How to embed workplace learning

1. Ten top tips from those who are doing it

1. The support of line managers is crucial. Keep line managers informed of workplace learning initiatives so that they know what is expected. Give them the resources they need to allow their staff to undertake learning.

2. With an ethos of lifelong learning, appraisals, personal development plans and the Knowledge and Skills Framework (KSF) can all have a real relevance for both staff and managers. Use them!

3. Workplace learning can and does take place without learning agreements. However, where a learning agreement is in place it helps to give structure, goals and sustainability to learning.

4. Where a partnership approach already exists, a learning agreement is a natural next step as all parties are likely to understand its potential and where it fits into existing structures.

5. Support for learning comes in many forms: for example, granting learners time off to go to classes or work-related study leave can be just as important as more elaborate projects. Staff who feel entitled to receive learning are more likely to take up the opportunity.

6. Recognise early successes: even small changes can have a big impact and help to promote lifelong learning.

7. A joint learning committee needs to be properly resourced, with minutes taken and meetings held according to the agreed frequency. Make use of all available resources, such as teleconferencing.

8. As well as being a valuable resource, a well-equipped and well-maintained workplace learning centre is also a strong symbol of commitment to lifelong learning.

9. Think creatively about sources of funding: sometimes financial support comes from unlikely sources.

10. Celebrate success: make it fun, keep the publicity going to encourage participation, boost morale, and instil a culture of workplace learning within your organisation.
Section 3: How to embed workplace learning

2. What union learning representatives do and what they can do for you

Union learning representatives (ULRs) can support staff to take up learning opportunities. For example, there may be people within your organisation who are resistant to learning due to a bad experience at school or a specific learning challenge, such as dyslexia, or who are just not aware of the learning opportunities available to them. ULRs will encourage the take-up of learning in a non-threatening and non-judgemental way.

ULRs can also help individuals tackle personal barriers to learning. For example, people may be reluctant to admit openly that they lack basic English, maths or IT skills as they may feel that this will jeopardise their job and/or that they will be mocked.

Bridges to Learning case study.

ULRs can help articulate at an organisational level the learning needs of staff who may not feel comfortable discussing their learning needs directly with their line managers.

ULRs can support the delivery of internal training offered by learning and development departments, for example by providing elements of induction training or by running workshops to help staff prepare for KSF or annual personal development reviews. They can also champion the importance of lifelong learning, training and development, and act as a role model for learning within an organisation.

ULRs can help recruit apprentices and support them in their learning needs.

Aintree University Hospital NHS Foundation Trust case study.

In geographically dispersed organisations, ULRs can provide a valuable link between what's happening locally and on the board – for example, through their representation on the learning and development committee or equivalent.

Cheshire and Wirral Partnership NHS Foundation Trust case study.
Section 3: How to embed workplace learning

2. What union learning representatives do and what they can do for you

ULRs are fully trained by their unions. They can help you identify the learning needs of your organisation and source high-quality, good value and relevant learning activities for your employees.

ULRs support other trade union representatives and negotiators in discussions which have a lifelong learning dimension.

ULRs are often a source of creative energy, bringing learning and development alive in ways that more formal structures can’t always achieve. Take a look, for example, at the website created by Lee Goddard, a ULR in the East Midlands Ambulance Service NHS Trust, which signposts learning opportunities.

East Midlands Ambulance Service Union Learning Representatives

Where there are no union learning representatives present, the employer should have a discussion with the staff side organisations represented on site. Another source of help are the unionlearn regional teams.
## Section 3: How to embed workplace learning

### 3. Developing a learning agreement

A strong learning agreement can help you deliver effective workplace learning within your organisation.

Workplace learning can and does happen without a learning agreement, but such an agreement signals long-term commitment and sets agreed goals. A learning agreement should be a living document which is monitored and reviewed regularly.

The learning agreement sets out each party’s commitment to learning and the organisational support, resources and expertise required to deliver effective and engaging learning and development. To ensure maximum impact, a learning agreement requires board level support and should be reviewed and/or adapted regularly to meet changing organisational/stakeholder needs.

Learning agreements come in many forms, but should always include the following key points:

- the joint aims of the employer and the union(s)
- clear objectives and targets
- a commitment to ensure all employees have equal access to learning opportunities
- a clearly defined role for ULRs – this can include time off for duties, facilities available, training, duties and rights
- the roles and responsibilities of managers, unions and other stakeholders
- a joint learning committee – role, composition and frequency of meetings
- clarity around allowing staff time off for learning, if time off is paid or unpaid, how to request it and so on: this is vitally important for lower paid staff who may have no time to learn outside working hours
- investment in learning
- any confidentiality practices and issues
- review and update period
- ways of measuring success – progress towards targets, impact on morale, staff engagement.

When developing a learning agreement for your organisation, you won’t need to start from scratch. Examples of learning agreements and templates are readily available, although you will need to tailor these to suit the particular needs of your organisation. You should also speak to your local negotiating committee and seek their advice.

### See also:

- Appendix 2: NHS model learning agreement wording.
- *Delivering better learning agreements*, unionlearn March 2012.
- UNISON Branch Guide to Lifelong Learning.
Section 4: How to overcome barriers

In this section we explore some common barriers to workplace learning and provide helpful tips on how to overcome these, together with case studies highlighting best practice.

1. “No need for that here”
2. Difficulties in reaching the key target groups
3. Overcoming confidentiality issues
4. Lack of internal training resources
5. Lack of training facilities
6. “We’re fulfilling our mandatory requirements”
7. Sustainability
8. The squeezed middle
Section 4: How to overcome barriers

1. “No need for that here”

A lack of corporate commitment to training can sometimes be an issue, with claims that “We’re too busy”, “Training distracts from operational duties” or “There is no money available beyond that for mandatory training.” This is the kind of thinking that views training as a cost not an investment. The business case arguments in Section 2 can help persuade the board to move towards a culture that is conducive to lifelong learning.

Alternatively, you may find that while there is support for lifelong learning in principle, there is a reluctance to sign a learning agreement. Take a look at the experience in Cambridge, Guy’s and St Thomas’ and Nottingham where the signing of a learning agreement helped these trusts deliver defined workforce development objectives.
Section 4: How to overcome barriers

2. Difficulties in reaching the key target groups

Workplace learning and learning agreements are a great way to reach out to some staff in Bands 1–4 who, for a variety of reasons, don’t engage in learning and development activities beyond those dictated by statutory requirements.

This may include people who have had poor experiences in education or are nervous that acquiring new skills might mean a change in job role or taking on additional responsibilities. The ULR, working with a learning agreement in a culture where workplace learning is encouraged, can have a positive impact in terms of supporting people back into learning.

Since staff in Bands 1–4 are more likely to miss out on appraisals and personal development plans, a good first step is to ascertain the current level of appraisals amongst staff in Bands 1–4 and set a target for improving it within an agreed timescale. If appraisals are being recorded in ESR, you will easily be able to access this information at an organisational level.

Organising events like an Adult Learners’ Week – which could include a Learning at Work Day or participation in World Book Day – can transform the way that staff view the acquisition of new skills. For example, ULRs at Chester and the Wirral Partnership Trust have organised drop-in reading groups and made ‘little books’ available from the library for coffee break reads in a bid to make improving literacy an enjoyable daily activity.

See also:

- Cheshire and Wirral Partnership NHS Foundation Trust case study.
- Guy’s and St Thomas’ NHS Foundation Trust case study.
- The National Institute of Adult Continuing Education (NIACE)
Section 4: How to overcome barriers

3. Overcoming confidentiality issues

The issue of confidentiality, when a member of staff admits to a ULR that they have a skills deficiency that could potentially be dangerous at work, often comes up in discussions. This can be dealt with in the agreement: the disclosure should remain confidential but the person concerned should be supported in raising the issue with management.

See also:

Cheshire and Wirral Partnership NHS Foundation Trust case study.
Section 4: How to overcome barriers

4. Lack of internal training resources

Another potential obstacle is the lack of training resources and skilled trainers within an organisation. Learning agreements facilitate access to the resources of individual unions and unionlearn (the learning and skills organisation of the Trades Union Congress) which works to assist unions, deliver learning opportunities for their members and also manages the government-funded Union Learning Fund (ULF). Other sources of public funding are also available.

Unions often negotiate agreements with providers or further education colleges they work with.

Take a look at the work of the Bridges to Learning project. Based in Newcastle, the project is funded by the ULF and was created by a three-way partnership of UNISON, the Open University and the Workers’ Educational Association.

See also:
- Bridges to Learning case study.
Section 4: How to overcome barriers

5. Lack of training facilities

The space and amenities for learning activities are often in short supply in many organisations, so it is important to specify in the learning agreement what equipment and facilities will be provided. While a learning centre doesn’t have to be large, it does need to be well sited and well maintained so that it gives the right message and encourages learner engagement.

ULRs should have a central role in running the learning centre and they will need facilities of their own where they can talk to staff in confidence.

See also:
- Guy’s and St Thomas’ NHS Foundation Trust case study.
Section 4: How to overcome barriers

6. “We’re fulfilling our mandatory requirements”

The 2012 NHS Staff Survey found that 81 per cent of staff had undertaken some form of job-related training during the previous year. However, as the UK Commission for Employment and Skills emphasised in a report, health sector employers have a higher than average level of training because it is boosted by the need for core mandatory training in a high compliance environment. However, this does not necessarily mean that wider personal, professional and organisational learning and development needs are being met.

See also:
- Derbyshire Healthcare NHS Foundation Trust case study.
Section 4: How to overcome barriers

7. Sustainability

Learning agreements may already exist in your organisation but unless a culture of learning is encouraged these agreements won’t deliver on their promise. Change is inevitable – key people move on, corporate cultures change, trusts merge, events happen – and it is vital to regularly review and refresh learning agreements in order to keep pace with changes and encourage sustained commitment from across your organisation.

Cumbria Partnership NHS Foundation Trust tackled their leaning agreement when everyone involved was busy with a merger and its aftermath and barely had time to sit down and talk. To address this situation they decided to sign a very general agreement, pending further refinement at an agreed date when things were more settled.

See also:
- Cumbria Partnership NHS Foundation Trust case study.
Section 4: How to overcome barriers

8. The squeezed middle

Line managers can sometimes feel caught between the pressures of managing staff and the demands of senior management. However, their commitment to workplace learning is vital to the successful take-up of available opportunities – for example, enabling staff to be given time for learning activities.

The powerful messages and recommendations in the Francis Report should serve to motivate line managers to measure the ‘cultural health’ of staff and act accordingly to develop and refocus staff so that patients, within available resources, receive effective services from caring, compassionate and committed staff, working within a common culture.

The use of the KSF can help with workforce planning and reviewing personal development and can prove a useful tool for line managers.

More information on Appraisal and the simplified KSF can be found here.

West London Mental Health NHS Trust found its learning agreement useful in helping line managers see the benefits of giving staff time off for learning.

See also:
- West London Mental Health NHS Trust case study.
Section 5:
How can you demonstrate the benefits?

1. Why is it important to measure success?
2. What should you measure?
3. How can you use Electronic Staff Record to monitor workplace learning?
4. Other sources of help for measuring the impact of learning
Section 5: How can you demonstrate the benefits?

1. Why is it important to measure success?

The more information you can provide to show the benefits of investing in learning and training, the easier it is to persuade managers or the board of its importance.

Measuring and recording the outcomes of workplace learning will strengthen the case for continued investment in funding successful initiatives.
Section 5: How can you demonstrate the benefits?

2. What should you measure?

The guide, *Demonstrating the benefits of investing in widening participation*, sets out impact measures, indicators and data sources to help managers assess the benefits of various developments around the widening participation agenda.

The guide points out that all too often expenditure on learning is done without being clear about what benefit needs to be measured. For example, is it workforce development, service delivery, personal development or improved productivity that you want to show improvement in?

The guide suggests metrics for five impact areas:

- increasing organisational and individual capacity
- improving organisational efficiency
- improving quality of care
- developing and applying skills
- delivering effective training, leading to improved outcomes.

See also:

- *Demonstrating the benefits of investing in widening participation*, Skills for Health.
Section 5: How can you demonstrate the benefits?

3. How can you use Electronic Staff Record to monitor workplace learning?

Across the NHS in England and Wales organisations are using the Electronic Staff Record (ESR) to plan and manage their workforce. The core ESR system consists of many functional elements that enable NHS organisations to manage employees throughout the entire employee life cycle – from successful applicant to leaver.

The Francis Report, published in February 2013, set out a number of workforce related recommendations. These recommendations present a range of challenges for HR directors and their teams, some of which can be addressed by utilising the full capability within ESR. It is the board’s responsibility to ensure that medical and nursing staff are competent, skilled and adequately trained in order to be assured that high-quality care and patient safety is at the heart of organisational culture.

Information and reports from ESR can be used by trust boards to monitor the context of service delivery, where training and development programmes are built around the required behaviours to ensure that the recommendations within the Francis Report are implemented and workforce standards set by regulatory bodies are also achieved.

ESR Business Intelligence provides a range of dashboard reports for workforce planning, monitoring and benchmarking. ESR’s Oracle Learning Management functionality supports the recording of learning and development by managing all learning activity from face-to-face courses to e-Learning. By utilising the talent management functionality, organisations are able to manage compliance and report on statutory and mandatory training, as well as the ability to undertake development reviews, capture qualifications and monitor registrations and membership details.

See next page for examples.
Section 5: How can you demonstrate the benefits?

3. How can you use Electronic Staff Record to monitor workplace learning? continued

The Talent Profile, released in April 2013, enables employees to view, at a single glance, all information relating to their career.
Section 5: How can you demonstrate the benefits?

3. How can you use Electronic Staff Record to monitor workplace learning? continued

The compliance matrix, available to both managers and employees, gives a visual representation of the current compliance levels with required competencies and individual needs.
Section 5: How can you demonstrate the benefits?

4. Other sources of help for measuring the impact of learning

With a learning agreement and annual learning plans in place, you are well positioned to measure the impact of increased access to learning opportunities:

**Union Learning Fund projects**
These are closely monitored and evaluated so that any learning provided with ULR input is quantitatively measured on outcomes on a quarterly basis.

**Vocational qualifications and ESOL courses**
Learning and development activities that lead to these qualifications have built-in evaluation. This is useful for employers in assessing the quality of training provision and in demonstrating the skills progression of their workforce.

**See also:**

**Chartered Institute of Personnel and Development (CIPD)**
The CIPD free factsheet, *Evaluating learning and talent development*, provides guidance on how to assess the quality of courses and monitor outcomes, such as skills improvement or greater productivity.

**Data sources**
There is a vast array of information that you can use to baseline your organisation’s current learning position – this will help you measure the impact of learning. You can access a wide range of readily available data sources, including:

- your trust’s sickness and absentee data, and turnover rates
- the annual staff survey
- incident and accident reports
- the trust finance department
- personal development reviews
- risk management logs
- complaints analysis
- patient surveys
- using social media – what are staff and employees saying about the organisation?
- temporary staffing and recruitment costs are useful sources of information.

**DIY surveys**
Create your own targeted staff surveys using online tools such as Survey Monkey. There is plenty of online help and resources available, covering everything from what questions to ask to how to go about surveying staff.

**See also:**
- What is an Employee Opinion Survey?
Section 6: Useful resources

1. Learning and development support
2. Funding
3. Union resources
4. Further reading
Section 6: Useful resources

1. Learning and development support

Health Education England (HEE) is the national leadership body responsible for developing the new education and training system for the health and public health workforce. Authorising and supporting development of local education and training boards, HEE became operational in April 2013. Its aims are to promote high-quality education and training that is responsive to the changing needs of patients and communities and delivered to standards set by regulators. It is also responsible for allocating and accounting for NHS education and training resources – ensuring transparency, fairness and efficiency in investments made across England.

The Electronic Staff Record (ESR) programme gives NHS staff access to over 400 national e-learning courses and enables local organisations to manage their own e-learning content alongside classroom-based courses. National e-learning courses are open to all staff on ESR, including volunteers, honorary staff and even applicants, and courses can be accessed at any time either in the workplace or from home.

Using Oracle Learning Management, NHS organisations are able to offer a blended learning approach by accessing nationally available, centrally administered e-learning content from key e-learning suppliers, such as Skills Academy for Health Core LearningUnit, DH e-Learning for Healthcare, NHS Connecting for Health and the Department of Health.

There is a large amount of quality e-learning freely available for all staff in the NHS. There are courses covering statutory and mandatory subjects as well as a wide range of courses designed to assist employees in their professional development. Key national initiatives, such as the NHS Leadership Academy’s Edward Jenner programme, which aims to help employees feel more able to deal with daily challenges of working in healthcare, are available via ESR. See the full range of courses available on ESR.

Supporting documentation includes user guides, technical specifications, details for content authors and project support. For more information on how your organisation can maximise the benefits of using ESR for learning management, including e-learning, there are a number of ways you can find out more. For details please contact your regional account manager. A full list is available here.

The UK Commission for Employment and Skills (UKCES) is a publicly funded, industry-led organisation providing strategic leadership on skills and employment issues in the UK. It has set up the Employer Ownership of Skills pilot, which is a competitive fund open to employers to invest in their current and future workforce in England. It aims to get more employers investing in the skills of their people and more career opportunities for young people.
1. Learning and development support continued

Skills for Health is the sector skills council for all health employers – NHS, independent and third sector. All national e-Learning is managed by Skills for Health. It identifies key policy priorities and provides a range of resources to help trusts deliver against these. Coordinated by the UKCES, Skills for Health is a useful source of advice and support. It also manages a number of projects funded by the UKCES. Skills funding is a devolved matter so different systems apply in Scotland, Wales and Northern Ireland. However, the UKCES and sector skills councils have UK-wide remits.

The National Institute for Adult Continuing Education (NIACE) exists to encourage more adults to engage in learning of all kinds. This is the largest organisation working to promote the interests of learners and potential learners in England and Wales.

The Open University and OpenLearn are pioneers of distance learning that helps people achieve career and life goals. OpenLearn offers a huge range of free learning resources, drawn from Open University materials, which can be downloaded and adapted as needed. The Open University, Workers’ Educational Association and UNISON worked together on the Bridges to Learning project in the Newcastle area.

Workers’ Educational Association, a charity founded in 1903, is the UK’s largest voluntary sector provider of adult education, delivering 9,500 part-time courses for over 74,000 people each year in England and Scotland.

The National Careers Service promotes the importance of ongoing learning both at work and through other activities such as volunteering. It offers the chance to open a lifelong learning account to keep track of learning and gives advice on courses and funding.

National Open College Network offers a step-by-step, unit-by-unit route into learning and skills that help to increase learners’ confidence and provides them with qualifications to improve employment prospects. National Open College Network qualifications range from entry level to level 4, and include important skills for life as well as skills that underpin the apprenticeship frameworks, such as functional skills.

Learndirect is a learning organisation that uses technology to transform the skills and productivity of the working age population. Over the last ten years, it has worked with more than 75,000 organisations – large and small, public and private – helping them develop the skilled staff they need to thrive.

The ESL online resource centre provides resources and teaching ideas for people for whom English is a second language.

Sn@p produces open source material aimed at healthcare staff to promote numeracy.
Section 6: Useful resources

2. Funding

Sources of public funding
Public funding to support adult skills development can be accessed by employers through a number of routes.

Funding for learning and qualification up to level 3 (A-level standard) is managed by the Department for Business, Innovation and Skills largely through three agencies:

• the Skills Funding Agency
• the National Apprenticeship Service
• the UK Commission for Employment and Skills.

Funding priorities, levels and eligibility rules change annually but there are four main areas of activity that may be of interest to NHS employers.

Adult skills budget
Under a programme to simplify skills funding, further education colleges have been given more flexibility to allocate the adult skills budget (£2,468 million in 2013/14) according to the needs of learners and employers. Of particular interest to NHS employers is funding to help people gain level 2 qualifications in English and maths. These courses are fully funded and providers should not charge fees. For more information

Apprenticeships
Apprenticeship funding (£764 million in 2013/14) forms part of the adult skills budget and is managed by the National Apprenticeship Service and delivered through training providers and further education colleges under contract. Large employers can also contract directly with the National Apprenticeship Service to fund internal provision. To qualify for funding, apprenticeships must use an approved framework that conforms to statutory standards. Funding is available for all level 2 and level 3 apprenticeships for individuals up to 24 years of age; loans are available for level 3 apprenticeships for individuals aged over 24. For more information

Employer Ownership of Skills
The Employer Ownership of Skills programme is being driven by the UK Commission for Employment and Skills (UKCES) and is intended to give employers more influence over the skills system. The Employer Ownership of Skills Pilot (2013/14 budget of £46 million) is a competitive fund open to employers looking to invest in their current and future workforce. Other UKCES programmes linked to employer ownership include the Growth and Innovation Fund (GIF) and the Employer Investment Fund. For more information

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2. Funding continued

The Union Learning Fund

The Union Learning Fund, administered by unionlearn, is designed to help unions promote and support learning opportunities for their members. It is generally used to train and assist ULRs to develop infrastructure in workplaces, including learning centres, and to provide resources for partnership working with employers. Projects are union-led and funding cannot be used for direct course provision.

The fund has supported more than 50 unions in over 700 workplaces and remains a flagship mainstream government programme – regarded as pivotal by unions, the government, employers and partner organisations in the learning and skills world.

Further education colleges

Local further education colleges provide a valuable point of contact for information about publicly funded skills programmes. As well as being direct deliverers of programmes, further education colleges are frequently connected to networks and partnerships with access to further support and funding. See, for example.

Career development loans

Professional and career development loans are available from banks to pay for courses and training that help with people’s careers. Applicants may be able to borrow between £300 and £10,000. Loans are usually offered at a reduced interest rate and the government pays interest while the person is studying. For more information.
Section 6: Useful resources

3. Union resources

Many unions have learning resources freely available to members, and if an organisation has a learning agreement in place, these resources can also be made available to other staff.

Unionlearn was established in 2006 by the Trades Union Congress to support union-led learning in England by helping unions deliver access to lifelong learning to their members based on quality standards. It seeks to engage with employers and providers to increase the quantity, quality and fairer distribution of learning opportunities.

The Royal College of Nursing’s Learning Zone
The RCN is committed to lifelong learning, professional development and promoting excellence in practice. You can find comprehensive and current resources and learning opportunities via their website which includes e-library services, publications and research, e-learning programmes, nursing communities and information on nursing practice issues. The resources are relevant to healthcare assistants, assistant practitioners, student and registered nurses. RCN learning representatives support work-based learning by seeking out the key RCN resources, events, advisers and activities that are relevant to your care setting.

UNISON’s learning and organising services coordinates trade union education and lifelong learning opportunities for members. This includes training and development for union reps as well as personal and career development courses ranging from Skills for Life through to professional qualifications. UNISON also offers learning discounts and a small educational grants scheme.

The i-learn e-learning service provides a range of general and continuous personal development courses for midwives and maternity support workers belonging to the Royal College of Midwives.

As well as offering clinical skills training, the British Medical Association’s online resource focuses on those skills predominantly used by doctors with their colleagues, including research, ethics and law, interviews, patient safety and IT. It aims to raise awareness of the range of programmes and training courses that are available for doctors to develop their management, leadership, mentoring, teaching and communication skills.

The Society of Chiropodists and Podiatrists (SCP) The SCP has a strong commitment to the development of its membership, offering them opportunities to meet their professional and career ambitions.

Unite the Union has a dedicated virtual learning and support site. It offers access to a wide range of online learning opportunities and support.
Section 6: Useful resources

4. Further reading


- Royal College of Nursing (2012) *Learning agreements: the benefits for employers in the NHS.*


- UNISON Branch Guide to Lifelong Learning (2009) *This is a useful resource that includes a model learning agreement.*

Appendix 1:
Learning for Life campaign – business case summary
Appendix 1:

Learning for Life campaign – business case summary

Background
At the steering group meeting in February 2012, the Social Partnership Forum (SPF) requested that NHS Employers deliver a campaign to increase workplace learning across the NHS. The overall aims of the project are to increase the level of awareness of learning opportunities, increase the amount of learning taking place and demonstrate the positive impact of learning on patient care.

Why do you need to support workplace learning?
There is a clear business case for encouraging workplace learning: investing in your workforce supports long-term productivity and contributes towards better patient care. There is evidence to show that when staff receive good quality appraisal, learning and skills training and are properly equipped to undertake their job role, this impacts positively on the patient experience and the quality of health outcomes.

The learning and skills agenda has never been static but recent changes to public policy, increasing demands on public services and the severe financial pressures faced by many organisations, means that ensuring ease of access to learning opportunities is more important than ever before. If employers support skills development, they are more likely to be able to recruit and retain the best staff, operate productive and efficient organisations, and above all meet the needs of patients.

Robert Francis QC’s report into failings at Mid Staffordshire NHS Foundation Trust examines the wider health system and makes recommendations for system-wide changes to prevent similar failings occurring in the future. Investing in your workforce by encouraging them to undertake workplace learning can have a positive impact on improving the quality of patient care within the NHS.

The benefits of workplace learning
Learning is vital for a high performing workforce that delivers the very best patient care. Professional and quality regulators clearly acknowledge this connection by including learning as part of the standards on which organisations can be assessed. Where an organisation fails to meet standards of patient care, either broadly or in specific incidents, learning is the key to raising standards. In addition, having a strong workplace learning culture can increase your reputation as a local employer and can support improving equality and diversity in the workplace.

Within the workplace there are many demands on English, maths and IT skills. Indeed, the Francis Report recommends that the Government should urgently consider the introduction of a common requirement of proficiency in communication in the English language, so that staff are able to communicate effectively with both patients and colleagues. Ensuring all NHS staff are sufficiently competent in English, maths and IT will ultimately contribute towards better patient care.
Possessing and developing the skills necessary to perform work tasks well and progress at work is critically important. In recent research, the overriding majority of learners cited accessibility, convenience and familiarity as key advantages to workplace learning.

It has been found that the workplace is often the best site for many people to develop their literacy and numeracy skills, develop the motivation and confidence to persist with learning, and get on better at work. Workplace learning is best placed to reflect and quickly respond to the needs of employers, employees and unions. If the benefits of workplace learning are to be fully realised, then it is imperative that staff are given the time off to learn.

Effective managers know that staff engagement occurs when workers feel and act positively about the work they do, their colleagues, and the organisation that they work for. Two major themes in employee engagement are ‘supporting personal development’ and ‘enabling involvement in decision making’. To help staff to feel engaged, managers need to provide learning and development.

**Where do I start?**

The aim of this project is to increase the level of awareness of learning opportunities, the amount of learning taking place, and the positive impact of training on patient care. This can be achieved by having some key things in place:

- Establishing and fully utilising a strong network of union learning representatives (ULRs) – ULRs can help articulate the learning needs of staff who may not feel comfortable discussing them directly with their line managers.
- Developing or reviewing a learning agreement – the agreement sets out each party's commitment to learning in the workplace, and the organisational support, resources and expertise required to deliver effective and engaging learning and development.
- Ensuring you have a learning centre that fully supports workplace learning – despite changes to funding and learning provision, an onsite learning centre remains a fantastic resource that can help you overcome a number of barriers to learner engagement.

**Barriers to the effectiveness of workplace learning**

Research has identified a variety of factors that can have a negative impact on the effectiveness of workplace learning. Some of these blocks result from organisations that see no value in continued learning, whereas other barriers are more subtle and impede a well-intentioned organisation's ability to train employees – common problems may include training personnel shortages and conflicting priorities.

**Using the Learning for Life campaign to promote workplace learning**

NHS Employers, in partnership with NHS trade unions and staff side organisations, has produced materials to support you with your campaign. We have gained national support from education commissioners – local education training boards and Health Education England. We now need support from key stakeholders from within NHS organisations, including chief executives and board-level members, to ensure the Learning for Life campaign is a success.
Appendix 2:
NHS model learning agreement wording
Appendix 2:

NHS model learning agreement wording

At the heart of a learning agreement is a willingness on the part of the union(s) and the employer to address workplace learning as partners. It is a formal agreement between one or more unions and an employer, which specifies how parties will work together on learning and development issues, and can cover the whole organisation, one workplace or one department. When looking into developing an agreement it is important to remember that:

- union learning representatives (ULRs) are vital for supporting people with their learning and development at the workplace and identifying barriers. Some unions may have learning champions or learning representatives rather than ULRs, but the roles are based on the same common principles around support for learning

- it is not necessarily the ULRs but workplace representatives and stewards who negotiate learning agreements. Often there is a joint negotiating committee or similar body that signs the agreements. Whichever is the case, ULRs provide knowledge and expertise on learning matters to the negotiating process

- learning agreements are only a starting point! The hard work is to follow. Agreements should be live documents and they need to be supported and reviewed on a regular basis to ensure progress is being made

- an action plan attached to the agreement helps to review the practical steps taken

- the template offers good practice ideas for those developing and negotiating learning agreements. It is not exhaustive, nor is it the bottom line. The final version needs to respond to the workplace needs.

For more information and ideas, read unionlearn’s Delivering better learning agreements.

Suggested wording for a learning agreement

This agreement is between [insert name/s of union/s] and [insert name of employer organisation].

Both [insert name/s of union/s] and [insert name of organisation] recognise the importance of equal access to learning opportunities and are committed to working in partnership to promote and support lifelong learning and the skills development needed. It is a joint priority to ensure all staff are confident and competent to undertake their role and provide care with compassion. All parties of this agreement commit to promoting equality and diversity at work and workplace learning.

The partners agree on the following:

1. General

Both parties will encourage staff to take up learning activities. This learning agreement provides a framework for partnership working on all matters relating to lifelong learning and training and development. This includes the Knowledge and Skills Framework (KSF) and continuous professional development to support health professions’ registrations requirement.
2. Coverage
This agreement covers all full-time and part-time employees of [insert name of employer organisation] including contracted out and agency staff.

3. Union learning representatives
3.1. The unions will be responsible for electing/appointing and training their union learning representatives (ULRs) and will inform management of the names and workplaces/departments of the ULRs and their intention to train for the role. [Insert name of employer organisation] will provide paid time off for ULRs to undertake their training and carry out their function and duties effectively as per ULR statutory rights detailed in the ACAS Code of Practice.

3.2. The number of ULRs will be [insert number].

3.3. The functions the ULRs cover [insert functions based around ACAS Code of Practice and anything else that is appropriate].

3.4. In addition to their statutory rights, ULRs will be granted [insert agreed minimum amount of time], for instance on the basis of number of people per ULR per workplace or other appropriate metrics, based on ACAS Code of Practice.

3.5. ULRs are encouraged to work together jointly across the organisation on cross-cutting learning activities and the sharing of good practice.

4. Joint learning committee
4.1. A joint learning committee will be set up and it will meet regularly as needed, but no less than four times a year.

4.2. Joint learning committee members will be [insert names and roles].

4.3. The overall aim of the group will be to promote, initiate, support and monitor learning and development activities across the site. The group will start their work by defining the terms of reference.

4.4. The group will have a right to co-opt representatives from other organisations such as unionlearn, learning providers and so forth to assist as necessary.

4.5. A report from the learning committee/steering group will be a regular item on the agenda of the joint consultative committee/joint negotiating committee at the workplace.

5. Training plan
A local training plan is reviewed by the joint learning committee to ensure it covers all staff in all grades and includes agency and contracted out staff.

6. Minimum qualification levels
Access to a minimum Level 2 (equivalent to GCSEs A*-C) in English, maths and vocational standards for all staff is guaranteed, priority to be given to up-skilling those who do not yet have this level of qualification.
7. **Information, advice and time off for learning**

7.1. Employees will be entitled to paid time off to participate in promotional events and to access discussing learning matters with their ULR.

7.2. Mandatory training and other training agreed in personal development plans/appraisals and as part of Knowledge and Skills Framework with line management is covered by the employer with paid time off arrangements.

7.3. English and maths learning is covered by the employer with paid time off arrangements.

7.4. Access to other learning and training opportunities needs to be considered by the employer with paid time off or other appropriate arrangements.

8. **Where appropriate, an additional learning agreement clause will be agreed on the following:**

8.1. learning centres

8.2. apprenticeships

8.3. English and maths

8.4. ESOL classes

8.5. continuous professional development

8.6. other.

The terms of this agreement will be reviewed regularly by the joint learning committee.
Case studies

1. Nottingham University Hospitals NHS Trust
2. Cumbria Partnership NHS Foundation Trust
3. Cambridge University Hospitals NHS Foundation Trust
4. Cheshire and Wirral Partnership NHS Foundation Trust
5. Treetops Hospice
6. East Midlands Ambulance Service NHS Trust
7. Guy’s and St Thomas’ NHS Foundation Trust
8. West London Mental Health NHS Trust
9. Bridges to Learning
10. Aintree University Hospital NHS Foundation Trust
11. Derbyshire Healthcare NHS Foundation Trust
Case study:

Nottingham University Hospitals NHS Trust

The organisation

Nottingham University Hospitals NHS Trust (NUH) provides services to over 2.5 million residents of Nottingham and surrounding communities. Employing 13,500 people, NUH is one of the largest employers in the region.

What they did and why

In March 2012, NUH became one of the first NHS organisations in the East Midlands to enter into a formal learning agreement with the healthcare unions and professional organisations representing its staff.

“We view learning and access to training as a key enabler in our bid to become the best teaching trust by 2016.”
Frances Newsham, Professional Development Lead, NUH

Designed to promote and protect learning and development opportunities for all staff, NUH wanted to ensure services to patients continued to be delivered by a suitably skilled and well informed workforce.

Budgetary pressures had put training programmes for staff in Bands 1–4 in jeopardy and surveys had revealed some staff were missing out on trust training programmes. For example, those with limited IT access at work were unable to access online learning/intranet opportunities or receive emails signposting courses.

The benefits

The learning agreement has opened the way to securing new sources of funding. NUH has been able to launch courses on a range of topics including communications, literacy, IT, business and administration, and customer service.

“At a time when NHS budgets are under severe pressure, yet the demand for safe, high-quality care has never been greater, this agreement demonstrates a very welcome and timely commitment to the principle that a meaningful workplace learning culture – one that respects the needs of individuals and values the input of the unions – is more likely to deliver good care for patients.”
Keith Miller, Chair of Staff Side, NUH
One visible result of extending training opportunities to a wider circle of staff has been a reduction in staff absenteeism and improved staff morale.

Thanks to the learning agreement, management is now more aware of the value of the ULR role and is keen to work in partnership with staff side to support increased take-up of staff training and development in paid work time. The culture of greater openness means staff discuss their development needs with union learning representatives, which is resulting in an upskilled workforce. Staff have confirmed they feel more valued than before.

**Key points**

- Use as many ways as possible to ensure people across the trust know what’s on offer and flag up if funding is provided (to encourage managers to be cooperative).
- Review information from union learning representatives to map individual and collective training needs across the trust.
- When people feel valued and positive about their career prospects, staff turnover is reduced – generating savings on recruitment and temporary staffing.
- Access to learning and development is a workforce morale booster.
Case study:

Cumbria Partnership NHS Foundation Trust

**The organisation**

Employing approximately 4,000 staff, Cumbria Partnership NHS Foundation Trust covers 220 different locations and provides community health services to almost half a million people. Its services include mental health, learning disabilities, drug and alcohol services, and health visiting.

**What they did and why**

Following a major service merger in 2013, it proved impossible to get staff side representatives around a table to discuss how to improve learning and development. With personnel so focused on operational issues, the decision was taken to initiate a very general learning agreement and review this after six months.

**The benefits**

In just six months the learning agreement opened the door to new resources and training delivery for staff, including:

- functional skills training from a new provider (available 24/7 online)
- access to free training sessions on stress-busting, financial information and staff wellbeing – delivered by unionlearn at three locations in Cumbria
- introduction of an easy reading club and five-minute maths challenges to boost literacy and numeracy.

The learning agreement has proved a good starting point to get things going at a time when the trust was busy with a merger. As needs in the trust change, the agreement will be refined. Union learning reps are providing valuable feedback on the courses staff want, if they like what is being offered, and where any training gaps are identified.

“Even though the hard data may not be there yet to show the benefits, these can be seen in attitudinal changes and improved relationships. It is well proven that over a long period of time those organisations that put learning and training high do better.”

Mike Taylor, Chair of the Cumbria Partnership NHS Foundation Trust

**Key points**

- Don’t feel you need to have everything worked out at the start. It’s best to take it step by step and adapt it as you go along.
- Just getting a basic agreement signed means it is ready and waiting to be developed as soon as the time is right.
- When financial pressures bite, developmental work is one of the first things to go. But putting short-term savings ahead of long-term gains is the biggest mistake you can make.
Case study:

Cambridge University Hospitals NHS Foundation Trust

The organisation

With over 8,000 staff, Cambridge University Hospitals NHS Foundation Trust (CUH) provides emergency, medical and surgical care through Addenbrooke’s Hospital and the Rosie Hospital. It is a national centre for specialist treatment in organ transplantation, cancer, neurosciences, paediatrics and genetics.

What they did and why

In May 2012 CUH signed two learning agreements to facilitate learning and development and formalise the apprentice scheme at the trust. Agenda for Change provided the initial stimulus for forging a strong working relationship between the trust and unions, including a learning and development sub-committee, which eventually led to the signing of a learning agreement to promote learning, development and training among staff.

CUH has been able to work with unions to establish a sustainable programme for apprentices, with genuine prospects for future development. Through dialogue, CUH was able to reassure unions that newly introduced schemes, including the Prince’s Trust and graduate schemes, would not replace already established posts.

“Through engagement we have been able to offer existing staff additional training and support and we regularly work in partnership on Adult Learners Week, again maximising development and funding available via the unions.”

Linda Hering, Employee Development Manager, CUH

The benefits

Agreements are now in place to ensure opportunities exist for apprentices, graduates and staff to learn and progress professionally. Joint working arrangements enable staff to seek support from learning representatives to identify potential courses and funding as well as advice on attending learning programmes.

Key points

- Additional resources made available through the agreement benefit staff throughout the organisation.
- Partnership enables the introduction of various employment programmes with union support.
Case study:

Cheshire and Wirral Partnership NHS Foundation Trust

The organisation

Employing more than 3,000 staff across 95 sites, Cheshire and Wirral Partnership NHS Foundation Trust (CWP) provides inpatient and community mental health services for children, adults and older people, as well as learning disability services and drug and alcohol services, across Cheshire and Wirral.

What they did and why

A diverse and geographically widespread trust creates challenges in terms of access to learning opportunities, and with budgets under pressure, union learning representatives were keen to ensure workplace learning and digital inclusion stayed on the training agenda.

The learning agreement was developed based on templates created by the Royal College of Nursing (RCN) and UNISON. There was a discussion on the issue of maintaining confidentiality if a member of staff disclosed a deficiency in a skill that was key to fulfilling their role safely. The agreement therefore states that people will be supported to talk to their manager about any skills deficiencies, which will then be addressed.

The benefits

Workplace learning at CWP is designed to contribute to professional and personal growth and increase an individual’s confidence in their ability to either maintain skills and knowledge, or develop them further.

“Developing a learning agreement has provided a collaborative approach towards planning learning within the workplace. As a result, we are better placed to respond to the changing economic landscape, which will ultimately help contribute to the efficiency and productivity of the organisation by meeting the personal and career development needs of staff.”

Jane Tomlinson, Learning and Development Manager, CWP
Cheshire and Wirral Partnership NHS Foundation Trust continued

The trust now benefits from many union learning representative-led initiatives. In one workplace, a union learning representative organises a regular drop-in reading group to help people with their reading confidence in a non-threatening way. Meanwhile, the library produces ‘quick reads’ – short books suitable for a coffee break.

In addition, the learning agreement has opened up the unions’ own learning resources, available free of charge, to a wider range of staff. As Sue Booth, an RCN learning representative, puts it: “With financial cutbacks, there’s a need for more training, not less, as staff take on more responsibility and need to learn new skills.”

Key points

• In a geographically dispersed trust, encouraging and organising local activities is a must.
• An action plan keeps things moving and provides agenda for meetings between employers and union learning representatives.
• The lead union learning representative has a seat on the key learning needs group, providing an overview of training needs and coordinating learning programmes.
Case study:

Treetops Hospice

The organisation

Treetops Hospice is an independent charitable trust that delivers end-of-life care for patients in their own homes, a day care unit for adults, and a bereavement support service for adults, children and families. Treetops Hospice covers a population of 1.25 million in southern Derbyshire and Nottinghamshire.

What they did and why

Having significantly extended its home care delivery service, Treetops Hospice wanted to:

• deliver highly relevant continuous professional development sessions
• maintain the skills of its nurses at the highest level
• ensure all its staff could benefit from training opportunities, including bank staff who are offered mandatory training and are at risk of missing out on quality development opportunities.

Following extensive research by Kathy Longden, Director of Clinical Services, to see if a Royal College of Nursing (RCN) learning agreement structure would enable the hospice to improve its training for nursing staff, the decision was taken to sign a learning agreement in July 2012. The hospice also agreed to fund two nurse leads as learning representatives.

Nursing staff were asked to complete a questionnaire on their learning needs, scoring themselves on core hospice nursing skills. These results were analysed and used to help plan the educational programme.

Education sessions now take place every six weeks. These are well attended and can be delivered within budget. The programme is planned two sessions in advance to allow time to collect relevant information or invite guest speakers. Each training session is monitored (via questionnaires) to assess how competent and informed staff feel before and after each session. The results are collated and used to indicate any gaps or training needs.

The benefits

Treetops Hospice has worked hard to ensure staff feel that the programme is tailored to their needs, using an ongoing process of consultation and feedback. The learning representatives also consider people’s different learning styles and try to include a mixture of presentations, group work and peer support.

The training undertaken so far has improved the level of staff confidence in clinical understanding and decision-making appropriate to their role, and an agreed template for reflective practice recording has been introduced to enable and assist staff in meeting their post-registration and education practice requirements.
Treetops Hospice continued

Learning representatives have been able to introduce a well-structured and inclusive training programme. What’s more, creating sessions to redress skill shortfalls in specific topics has proved a much less confrontational way of addressing learning gaps, and has had wider benefits for the whole team.

“The learning agreement provided Treetops Hospice with the impetus and drive to improve learning and development provision and re-motivate nursing staff. We’ve already seen attendance at our nurse support and educational sessions improve dramatically.”
Liz Docker, RCN union learning rep, Treetops Hospice

Key points
• This non-NHS charity is now able to access high-quality training resources.
• The programme is of particular value to bank staff who may not have access to other learning opportunities.
• Training and development needs are monitored by regularly asking staff what they need.
Case study:

East Midlands Ambulance Service NHS Trust

**The organisation**

East Midlands Ambulance Service NHS Trust (EMAS) provides emergency 999, urgent care services for the 4.8 million people within Derbyshire, Leicestershire, Rutland, Lincolnshire, Northamptonshire and Nottinghamshire. It employs over 2,700 staff at 76 locations, responding to over 776,000 emergency calls every year.

**What they did and why**

EMAS is the first ambulance and emergency service – and the first regional healthcare provider – to sign a learning agreement, which was developed after several years of activity by UNISON ULRs and in collaboration with the Royal College of Nursing, GMB, UNISON and unionlearn.

Sue Fry, EMAS non-clinical development lead and UNISON lifelong learning coordinator, says the aim of the agreement is to support staff in their current and future ambitions and ensure that the services provided to the local population will continue to improve.

Lee Goddard, a UNISON union learning representative, says a key difficulty for a trust like EMAS is getting people to attend courses regularly – for example, a sign language course the trust wanted to run requires attendance one day a week for 20 weeks.

**The benefits**

To ensure personnel at the trust’s 76 locations can stay updated on available free courses in the region and online resources, Lee Goddard has created a website everyone can access.

There is an emphasis on helping people improve their literacy and numeracy skills, with ‘Return to learn’ courses and confidence building for women.

The historic agreement, which includes time off for training, generated a great deal of positive coverage for the trust in the regional and trade press:

- ‘Ambulance Service Sign Joint Learning Agreement’
- ‘EMAS make deal with unions to help staff learning’

It is a clear signal that EMAS is willing to invest in its employees by fostering learning and development opportunities.

“Our service has faced some challenging times over recent years, and one of the ways to move forward from this is through learning and development. That is why the signing of this joint learning agreement is such a significant step.”

Phil Milligan, Chief Executive, EMAS

**Key points**

- Learning opportunities are signposted via a website created thanks to a union learning representative initiative.
- The union learning representative has built a positive reputation for the trust.
Case study:

Guy’s and St Thomas’ NHS Foundation Trust

The organisation

Guy’s and St Thomas’ NHS Foundation Trust includes two of London’s best known teaching hospitals – Guy’s Hospital and St Thomas’ Hospital, where the Evelina Children’s Hospital is located. Since 2011 it has provided community care for residents of Lambeth and Southwark and is part of King’s Health Partners, one of five academic health sciences centres in the UK.

What they did and why

The creation of a learning partnership committee in 2000 was the first step to improving partnership working and moving employee relations onto a more constructive footing. The signing of a learning agreement in 2001 signalled the initiation of lifelong learning for staff that the trust believed would create more career opportunities, reduce turnover, increase workforce flexibility and improve morale.

Learning advisers were recruited and trained, funded by the Trades Union Congress (TUC) and delivered on site by tutors from the TUC study centre at Lewisham College. A key focus of the team was identifying staff, such as housekeeping staff, who would most benefit from basic skills development, including competency in English.

Today, the trust’s ten union learning representatives are involved with the joint learning committee and have established an excellent track record in sourcing skills for life learning opportunities for staff. Training delivery is sensitive to where people live and their childcare needs.

The benefits

Staff now recognise the value of skills for life learning in relation to their career and personal aspirations, and many have gained new language skills that benefit them in the workplace and enable better integration in the local community. Meanwhile, the trust is encouraging new training approaches, such as shadowing, as a powerful supplement to classroom-based learning.

In the past decade the trust has put 10,000 staff through a dementia learning programme (see Barbara’s story) and has benefited from improved communication and partnership working with the unions. Staff and managers are clear about the benefits of improving basic skills and have a greater understanding of the learning opportunities they can access.

A dedicated group of union learning representatives identify staff who need help with basic skills, creating a safer workforce that is better equipped to take on new responsibilities.

Key points

• Trust management saw the learning agreement as a way to improve partnership working, and have ensured union learning representatives are well resourced and have good computer skills.

• A strong emphasis on wider social and community needs and pastoral care has helped create a learning organisation that is dedicated to the real needs of staff.

• The trust has benefited from an upskilled workforce that is always being prepared to meet evolving needs.
Case study:

West London Mental Health NHS Trust

The organisation

West London Mental Health NHS Trust provides care and treatment for around 20,000 people each year. It is a leading national provider of forensic (secure) and specialist mental healthcare. The trust includes Broadmoor Hospital and The Cassel. Employing about 4,000 staff, the trust serves a highly multicultural community across three London boroughs.

What they did and why

Following a learning needs survey conducted by Unite the Union, the trust took the decision to sign a learning agreement and dedicate funding for the delivery of English for speakers of other languages (ESOL) courses. While Unite had already been successful in delivering literacy and numeracy training across the trust, the newly formalised learning agreement would:

• safeguard staff being able to ask for time off to attend learning
• open up the delivery of Unite’s training resources to non-union members.

The trust’s education steering group identified an ESOL provider, created a provider partnership agreement and began to promote courses through the trust’s intranet, Training matters (a weekly email sent to all staff) and posters on union and trust notice boards.

The benefits

Take-up of ESOL and literacy and numeracy courses has been strong. Having completed training, many staff have progressed onto new roles, including entry into nursing. With literacy and numeracy better embedded in the workforce, staff are able to satisfactorily complete mandatory training.

The learning agreement has also enabled the trust and union learning representatives to work closely with managers and iron out any issues relating to releasing staff to attend courses. Staff are happier engaging with learning representatives to discuss their learning needs and are volunteering to up-skill.

The trust has set aside budget for another ESOL intake in September 2013 and wants to do the same with English and maths. A registration day and an adult learning event have generated more interest in learning new skills, especially among staff who would not normally access training and development.

“Offering staff access to literacy and numeracy skills training helps us deliver a more effective service to service users and gives staff transferable skills that support them in their day-to-day lives.”

Andy Wells, Associate Director for Learning and Development
West London Mental Health NHS Trust continued

Key points

- A union initiative has led to agreement and strong partnership working.
- The trust has put the focus on ESOL courses for staff in Bands 1–4, funding a rolling programme, and has been successful in generating high levels of take-up.
Case study:

Bridges to Learning

The project

Bridges to Learning is a unique partnership between the Open University, UNISON, the Workers’ Educational Association, and health and social care employers in local authorities and NHS trusts. Funded by unionlearn (the learning and skills organisation of the Trades Union Congress) the project aims to enable staff in the health and social care sector across the North East – particularly Bands 1–4 care staff – to improve their skills and develop new approaches and progression routes through learning.

What they did and why

The initiative was formed in response to the need to deliver access to learning for staff who are outside of continuous professional development. Harnessing the skills and reach of union learning representatives has paid real dividends. Key to the success of the project has been the development of strong strategic relationships between UNISON branches, union learning representatives and their employers in the North East’s health and social care sector.

The benefits

The approach is enabling NHS employers to bring less confident members of their workforce into the learning agenda. It has resulted in some highly innovative learning provision, including Turkish language classes and ‘clippy’ mat making at County Durham and Darlington NHS Trust.

In the past two years:

- almost 4,500 guidance sessions have been delivered by union learning representatives
- vital language, literacy, numeracy and IT skills have been delivered across the health and social care workforce – 500 staff members have improved their skills
- all union learning representatives are now qualified to at least Level 3 in information, advice and guidance and many now hold the Preparing to Teach in Lifelong Learning Sector City and Guilds Level 4 qualification.

Almost all of the participating employers in the Bridges to Learning partnership have adopted a learning agreement in the last two years, strengthening their partnership with UNISON and securing time off for learning for staff. As a result, union learning representatives are able to work positively with learners and their line managers and promote learning across the workplace.

The demographic trends in the North East, where the decrease in the number of young people entering the workforce is predicted to continue until 2030, has put a focus on the skills of the current workforce. NHS employers now view a learning agreement as a key step on the route to being able to ‘grow your own’ from among existing employees and increase their capacity and capability, wherever possible.
The regular interaction of union learning representatives with staff means significant skills gaps and knowledge updating requirements are quickly identified. In addition, trusts are better able to respond to emerging issues flagged by the workforce, with training programmes to address topics such as sign language, understanding mental health, and death and dying.

Access to new sources of funding have also opened up – for example, financing from the Collective Learning Fund to help prepare people for their next career steps.

Thanks to these new resources, County Durham and Darlington NHS Foundation Trust has been able to trial the Bridges to Learning progression route that combines a vocational qualification with the Open University's K101 Introduction to Health and Social Care. It has proved an important lifeline, as Roy Westhead, learning and development manager at the trust, explains:

“These extra resources could not have come at a better time. Funding pressures mean we’re focused primarily on meeting mandatory training requirements for the trust but now, working with the UNISON learning representative, we’re able to include all the UNISON learning opportunities we can access in our learning directory.”

**Key points**

- Make learning agreements into live and vital documents that underpin the workplace learning agenda.
- Stimulate learning through innovative provision that will inspire people to return to learn.
- Look to combine the workplace learning needs of the employer and employees.
- Harness new progression routes and career pathways.
- Develop easy-to-use personal development plans for both managers and staff members.
- Work to combine resources to maximise reach and impact.
- Develop strong learning networks of people within and across organisations in the health and social care sector.
- Explore similar approaches and models in other areas of the private and public sectors.
- Utilise lifelong learning to release the talent in Bands 1–4 and ‘grow your own’ by developing future workforce resources for the long term.
Case study:

Aintree University Hospital NHS Foundation Trust

The organisation

Employing 4,000 staff, Aintree University Hospital NHS Foundation Trust (AUH) is a large teaching hospital in Liverpool that provides accident and emergency services and a wide range of acute and non-acute specialties.

What they did and why

When Walton Hospital closed and transferred to AUH, the trust launched a project to encourage employees to sign up for apprenticeships in customer service, business administration and hospitality.

Working alongside unionlearn and UNISON, the trust’s learning and development team secured funding for the apprenticeships from the Skills Academy for Health – a government initiative to increase levels of numeracy and literacy within the workforce.

The benefits

Since 2009 the trust has enabled 250 apprenticeships in frameworks including healthcare, IT, business and administration, hospitality and catering, customer service, clinical healthcare support and team leading. Unionlearn and the union learning representatives have been key in helping to recruit apprentices and providing support and mentoring so that apprentices can complete their training successfully.

Despite the fact that many apprentices have been outside of the classroom for decades, all have grasped the new opportunities and are evolving their skills to the benefit of the trust.

Apprenticeship in action

Susan Garner recently completed an apprenticeship in domestic team leading at Level 2 with West Cheshire College. The trust gave Susan time off work to complete the course and covered all associated costs. She was also supported by her union learning representative, Marie Reece.

Being a mature student, Susan had some apprehension about ‘going back to school’ but her anxieties were laid to rest by the support she received from her course tutors. The informal method of teaching was ideal for Susan.

Today, Susan has much more responsibility and supervises 44 domestic cleaners at the trust. She works closely with patients and medical staff to ensure she is able to carry out her duties to a high standard. She has since enrolled on an IT course and is hoping to do a further apprenticeship course in customer service.
Case study:

Derbyshire Healthcare NHS Foundation Trust

Training passports via Electronic Staff Record

Derbyshire Healthcare NHS Foundation Trust has made pioneering use of Electronic Staff Record (ESR) to introduce ‘training passports’ for every member of the trust’s 2,440 staff. The trust is using the Talent Management module of Oracle Learning Management to track and record training requirement competencies for every post.

- It enables both employees and managers to know exactly what training has been completed and identify gaps in training that is required.
- It offers a clear performance position on mandatory compliance rates and targets.
- It provides reassurance to all stakeholders of the commitment to staff training and determination to improve patient care.

Training passports are emailed automatically every month to individuals, which means that staff do not have to worry about having to keep on top of training – the passport stays up to date and they are consistently reminded about the passport’s status.

Competencies are classified as either ‘C’ for compulsory (yellow) or ‘R’ for role specific (blue), which helps to prioritise training. It gives the expiry date of a competence, a green or red colour code to highlight training that is completed or required, and details enrolment information for future learning opportunities. It is also aligned to the roll-out of the trust’s eLearning programme, which represents 75 per cent of all training and has contributed significant efficiency savings.

Training has been propelled to the forefront of employees’ minds at team meetings, providing a new-found community of interest.

Managers have added passports to meeting agenda as a reminder to staff to keep them up to date and to ask if everyone is accessing the training that is available to them. Staff are also requested to bring passports to supervision meetings.

Following the publication of the Francis report, training and patient safety are at the top of the NHS agenda. The expansion of a training passport scheme to the wider NHS would help organisations meet – and beat – best practice and the Francis report’s recommendations.

Keeping track of an individual’s completed and outstanding training can be very difficult, with the Francis report revealing that many managers admitted to never feeling fully confident that they had the full picture or indeed that everyone had undertaken aspects of essential training.