



STUC
333 Woodlands Road
Glasgow
G3 6NG

24 August 2004

Dear Colleague

Invitation to Tender

You are invited to submit a tender to conduct a feasibility study into the potential for a new trade union learning institution/academy in Scotland. This study is being commissioned by the STUC in conjunction with the TUC, with the support of the Scottish Executive.

Details of the required feasibility study are outlined in the attached document.

Tender documents should be returned marked "Tender – Private and Confidential" to Ann Garscadden, Administrative Assistant, STUC, 333 Woodlands Road, Glasgow G3 6NG by 4.00pm on Thursday, 23 September 2004.

If you require any additional information, in the first instance please email Ann Garscadden at agarscadden@stuc.org.uk

Yours faithfully

Grahame Smith
Deputy General Secretary
STUC

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TUC 

A new Trade Union Learning Institution/Academy in Scotland

An invitation to tender to conduct a feasibility study into the potential for a new trade union learning institution/academy in Scotland

**UNIONS
WORK**

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Introduction

The Scottish TUC and the TUC Education Service in Scotland, with the support of the Scottish Executive, are seeking tenders for the conduct of a feasibility study into the potential for a new trade union learning Institution/Academy in Scotland. This concept is being developed jointly by the STUC and TUC and a separate feasibility study has been commissioned by the TUC to consider issues in the context of the funding and policy environments in England, Wales and Northern Ireland, while addressing the interface with devolved government and union structures in Scotland.

The purpose of this feasibility study is to give greater focus to the implications of devolved policy making and funding arrangements on education and training in Scotland and the distinct Scottish education and training infrastructure for the operation of a new union Institution/Academy in Scotland.

This document sets out the context in which this proposal is being developed, the challenges it presents and the issues to be considered in the study.

Section One

The Vision

- 1.1 In the modern world of work trade unions are increasingly focused on helping working people get on at work by raising their skills. Furthermore, unions are increasingly switching resources into learning in order to attract and retain members. Within this context, our principle aim is to radically increase the number of learning opportunities that trade unions can provide for working people and to transform learning through unions so that offering learning services to members becomes a central pillar of union activity.
- 1.2 To achieve this aim we propose the establishment of a Trade Union Learning Institution/ Academy. In Scotland, this Institution/Academy will:
 - contribute substantially to the Scottish Executives as well as the UK Government's economic and social priorities, which are greatly dependent on successfully tackling our skills deficit
 - make a significant contribution to the fulfilment of the goals of the Executive's Lifelong Learning Strategy and the objectives of Smart Successful Scotland, the operating plan of the Enterprise Networks, by driving up the demand for skills in the workplace
 - build on the proven success to date of union learning and the role of Union Learning Representatives (ULRs)
 - be able to reach the thousands of working Scots who currently have everyday skills needs
 - reach all current union members and the those likely to join as they see unions as a route to accessing learning opportunities
 - further develop the link between union led learning and the needs of the workplace.
- 1.3 The Learning Institution/Academy will help establish the trade union movement as the acknowledged champion of learning for employees and for all forms of work-based learning and development. This will be achieved by pulling together all the current

strands of union and STUC learning activity with the TUC Education Service in Scotland into a coherent, powerfully branded service; offering a single gateway into the world of learning. The Learning Institution/ Academy would aim to be viewed by all employees, union members, union activists and employers as the first port of call for all their learning needs. It will not be restricted to the 700,000 union members in Scotland. All employees will be offered the opportunity to access learning through the Institution/ Academy.

Section Two

The New Learning Institution/Academy

- 2.1 The proposed Union Learning Institution/Academy aims to achieve a step change in the numbers of working people engaged in learning to improve their skills, particularly, but not exclusively low skilled employees and those facing additional forms of discrimination.
- 2.2 It will repackage, reorganise and substantially extend and increase the work that the STUC, affiliated unions and TUC Education in Scotland currently undertake, within a coherent new brand that communicates collective union values, and at the same time reaches out beyond current union membership to parts of the workforce less likely to be unionised e.g. SMEs, and specific sectors such as hospitality and tourism.
- 2.3 The Institution/Academy will not itself deliver training, which will continue to be provided through a wide range of Colleges, Universities and other providers. The Institution/Academy will broker and coordinate training; ensure courses are fully accredited and linked to the Scottish Credit and Qualification Framework (SCQF) to encourage progression; encourage innovations offered by ICT; and work with unions, employers and Sector Skills Councils to develop coherent tailored programmes.
- 2.4 It will offer learning programmes for learners at all levels, ranging from “Everyday Skills” through to higher education progression routes, through a union gateway approach facilitated by ULRs that ensures individuals get initial encouragement, support, assessment and information advice and guidance, so that they can choose across a wide range of learning at appropriate starting points.
- 2.5 In order to do this, it will build on the growing number of Scottish ULRs (over 1000 in 2004, projected to be 2,500 by 2010) who will be developed, through the Learning Institution/Academy, to enable them to engage and support their fellow employees through the provision of effective information, advice and guidance on all forms of learning. ULRs have already demonstrated that unions have a unique ability to reach people at work who would otherwise never

have considered re-entering learning after leaving formal education.

2.6 Underpinned by an STUC, TUC and union commitment to equality of opportunity, the Institution/Academy will reach out to and engage learners for whom accessing provision is a particular problem for example:

- shift workers
- remote or home workers
- temporary and casual workers
- free-lance workers
- people for whom English is a second or additional language
- people with little or no formal learning since leaving school
- people without qualifications
- people who face discrimination at work or in the wider community
- people facing redundancy

2.7 It will provide access to a wider range of provision (e.g. vocational training and qualifications, foundation degrees, apprenticeships) for workers using Scotland's FE and HE institutions, and accredited learning centres, particularly those based at the workplace.

2.8 The Learning Institution/Academy will also be able to further develop the TUC Education Service and trade unions key roles as providers of training courses for all kinds of workplace union representatives (around 3000 courses in Scotland were provided in 2003).

2.9 It will be a union-wide service covering the whole geographical area of Scotland including the Highland and Islands.

2.10 It will be part of a UK wide approach to union learning with a structure that reflects the arrangements for devolved government and union structures in the UK.

Section Three

Background and progress to date

- 3.1 The role played by unions in lifelong learning has a long history and broad scope and has been acknowledged by the Scottish Executive. Apprenticeship training; worker education; trade union education (the training of shop stewards; health and safety representatives, etc); as well as the formulation and implementation of training programmes for unemployed workers, have been significant elements of union activity over many years.
- 3.2 More recently, as the demands of the labour market have changed to reflect the demands of a modern, global economy, and as job insecurity has become a major concern for workers in both public and private sectors, the focus of union activity has moved to the training and re-training needs of members in the workplace.
- 3.3 In a workforce training policy environment characterised by the voluntary principle, the response of unions and of the STUC has been to concentrate on building the capacity of unions to work in partnership with employers, and others, to increase the learning opportunities available to their members. The principle mechanism for this has been the Union Learning Representative (ULR), union members, normally elected by colleagues, and trained to represent their interests on learning matters and to encourage and support their learning. 1000 ULR have been trained in Scotland through the TUC and individual unions.
- 3.4 Individual union approaches to learning activity have developed in ways that reflect the needs of their members. Support with everyday skills (numeracy and literacy); the establishment of work based learning centres; partnerships with colleges, universities, enterprise and skills bodies; and, in some cases, the direct provision of courses to members, have all been features of the learning service offered by unions to their members.
- 3.5 As activity has evolved, a number of unions have established strategies that put learning at the core of their organisational development, linking the learning service offered to members and the training of activists through shop steward, health and safety

and ULR training, etc, with the learning offered by unions to their employees.

The Role of the STUC

- 3.6 With few exceptions (specifically the Scottish teachers' unions), unions operate on a UK basis, with headquarters in England. Historically, with union activity on workforce learning focused on apprenticeship and activist training, union led learning has operated in this context. As the learning and skills demands of the labour market and union members have changed, the STUC identified the need to develop a range of services to support union led learning activity in Scotland.
- 3.7 The role of STUC in relation to lifelong learning is to provide a range of services to its member unions to support their learning activity, and to do so in the context of the Scottish policy environment. To this end, the STUC has adopted a strategy on lifelong learning with two related strands: to support and facilitate activity that builds the capacity of union members in career and personal development terms (workplace learning); and to support and facilitate activity that builds the capacity of union activists to represent their members (trade union education).
- 3.8 Trade union education in Scotland, in the main, is organised by the TUC through a network of FE based trade union studies departments, which offer shop steward, health and safety representative, and union learning representative courses, amongst others. The TUC programme, is managed by the TUC's Scottish Education Officer, who is based in Glasgow. The STUC works with the TUC to promote demand for TU education courses and to ensure that the programme appropriately reflects Scottish union priorities. This role has developed significantly since devolution, as the STUC's relationship with the Scottish Executive has evolved, its ability to access funding for initiatives with a learning dimension has increased.
- 3.9 Joint work between the Executive and the STUC on equal pay and race discrimination in the workplace, for example, has produced demands from union members in Scotland for the development and provision of TU education courses, supplementary to the TUC programme, creating curriculum development and course planning issues, and involving the STUC more directly in managing

provision. Similarly, the establishment of union learning representatives, in a Scottish policy context, and their integral role in workplace learning activity, has required a more active role for the STUC, particularly in relation to everyday skills issues.

- 3.10 It is in its role as a supporter and facilitator of union led workplace learning activity that the STUC been most active. This work has been undertaken by the STUC Lifelong Learning Unit (LLU), established, initially with the support of Scottish Enterprise(SEn), and latterly with additional support from Highlands and Islands Enterprise (HIE) and Learndirect Scotland.

The STUC Lifelong Learning Unit

- 3.11 The STUC LLU, was established in 1999, funded initially for a three year period, and covered the SEn area. This funding was renewed for a further three years and is due to conclude in September 2005. Funding from HIE and Learndirect Scotland enabled the Unit to establish a presence in the Highlands and Islands in July 2003 for a two year period.
- 3.12 The Unit is managed on a day-to-day basis by senior STUC staff. Its operational activities are undertaken by two development officers, one based in the STUC's Glasgow office and the other in the STUC office in Inverness, and an adult literacy co-coordinator, based in Glasgow, funded through the literacy pathfinder programme. The funding for the pathfinder is due to end in March 2005.
- 3.13 The Unit exists to provide a range of services to unions to support their learning activity. The initial aims of the Unit were to:
- increase awareness amongst TU members of the importance of learning activity;
 - provide practical support to unions in the development of their lifelong learning strategies;
 - provide practical support to unions in creating partnerships aimed at developing innovative approaches to improving access to learning opportunities; and

- develop the capacity of unions to enable them to sustain activity on learning over the medium and longer term.

These aims were crafted to meet the needs of the STUC's affiliated unions, specifically the need to build union capacity on learning issues.

- 3.14 The subsequent establishment of the Scottish Union Learning Fund (SULF) and the Trade Union Working Party on Lifelong Learning (TUWPLL), both created with the involvement of the Unit, led to an early review of its operational activities. SULF, TUWPLL and "Life Through Learning Through Life" and the support required by unions to engage in them, have become the main drivers of the Unit's activities, and have resulted in it adopting a more strategic role than originally envisaged. The adoption of this role produced the adult literacy pathfinder project and the establishment of the Unit's presence in the Highlands and Islands.
- 3.15 The General Council engages with its affiliated unions on learning matters through the STUC Learning Forum. The Forum was established by the General Council to advise it on learning issues and provide an opportunity for the development of learning initiatives. It is attended by representatives of more than half of the STUC's 43 affiliated unions.
- 3.16 Whilst there has been universal satisfaction with the range of learning services currently provided by the STUC, affiliates have emphasised the need for STUC support to reflect the evolution of union learning activity and the desire by unions to move from an approach focused on building the capacity of unions to deal with learning to one focused on workforce learning provision. Specifically, the unions are demanding developments in the following areas:
- a greater focus on locally based support for union learning representatives in the operation of their role;
 - a greater focus on partnership building at a local level, between unions and other stakeholders, particularly employers and learning providers;

- the provision of information to union learning representatives on a regular basis on developments in learning policy and on learning related initiatives;
- a continued emphasis on everyday skills, including union capacity building, provision for members and accessible funding;
- an increased emphasis on translating trade union experience at an operational level into policy formulation and implementation;
- a need to facilitate contact and communication between union learning representatives across and within unions;
- greater integration of STUC and TUC learning activity, with greater synergy between workplace learning and trade union education, and a common brand;
- the need to establish a comprehensive union led approach to the provision of on-line learning opportunities to union members;
- the need to establish the consolidation of, and increased funding for, union led learning activity;
- the need for a step change in union led learning activity, with the focus being the provision of union led learning opportunities within mainstream FE and HE, linking to the learning and skills needs of employees, employers and industrial sectors, as identified through the network of Sector Skills Councils.

3.17 It is difficult to estimate the number of Scottish employees (both union members and others) who are brought into learning through the work of ULRs each year but the figure is probably no less than 3500. This means the total number of union members and other employees who are engaged in learning through unions' own services is around 10,000. We believe that, given total Scottish union membership of 700,000 (and slowly rising) this figure could be radically increased.

Trade Union Education – representatives and officers training

3.18 TUC Education service in Scotland provides training courses for all kinds of workplace union representatives, with more than 3000 Scottish union reps being trained each year. The TUC Education

programme has been growing steadily since 1997 and UK wide trained almost 39,000 in 2003 (the highest figure since 1978) while unions themselves trained a further number, at least 25,000 and probably very many more.

- 3.19 The TUC and unions are longstanding providers of trade union education. Statutory rights back this training for representatives in organisations with a recognised trade union to have reasonable time off to attend TUC or union approved training
- 3.20 The TUC Education Service in Scotland offers training through the Scottish Further Education sector to a growing number of representatives and officers and has a reputation for quality and innovation with a routine achievement of Grade 1 in HMI inspections. Training takes place locally, with around 8 FE (72 FE in the UK) college partners in colleges, union premises, workplaces or other venues as determined by union needs. Courses are accredited through the National Open College Network, with most credits obtained at levels VQ Level 2 and 3, though Level 4 is currently being developed.
- 3.21 The TUC Education Service has a reputation for quality and innovation in the design of course materials and programmes and, in particular, tutor training in which TUC has invested much time and resource over the past few years. The relationship with colleges is managed by TUC Regional Education Officers (REOs) who work to ensure that the best of FE is incorporated into the programme, including pathways to qualifications, professional support on issues such as basic skills and flexible responses to the needs of unions across all sectors. Trade Union Studies tutors are all experienced trade unionists, professionally qualified and with an excellent reputation across FE. The current Scottish REO holds a teaching qualification and is a member of the GTC for Scotland.
- 3.22 Union representatives' training has been growing since 1997 at around 4% per year, with a 6% increase in 2003, the latest year for which figures are available. This is against a backdrop of decline in some of trade unionism's heartland areas and sectors – but also strong growth in membership white collar and professional unions. The development of TUC Education's online learning strategy is showing that flexible delivery pays off in SMEs, amongst shift workers and where the geography makes it difficult to deliver traditional classroom provision. By the end of 2005, all TUC

programmes will be available as classroom based or online provision. Much of this innovative work in on-line learning has been developed in Scotland and TUC Education units in Scotland are now firmly established as key and lead providers for on-line and blended learning.

- 3.23 The TUC and unions also provide training for union full time officers (FTO's) of whom there are some 500 in Scotland (4500 in the UK and 6,000 other union staff). The TUC Education service unions deliver this through a mixture of national and regional briefings. Training for FTOs and other union employees is already steadily developing as unions continue to make their services more professional. This form of training (some at HE level, some involving CPD programmes) could form a major part of the higher-level work of the proposed Institution/Academy.

Summary

There has already been a great deal of progress towards the vision offered by the Institution/Academy. The STUC is playing a leading role in driving the union learning agenda, working hand in hand with an expanding TUC Education service in Scotland. All the major unions and many others have developed strong and growing learning services. ULR numbers are quickly growing and relations with employers on the learning agenda are good with a growing number of workplace partnerships and learning agreements in place. Union led learning activity is moving from an emphasis on building union capacity on learning to provision for members.

There are strong partnerships with the Scottish Executive and agencies such as Learndirect Scotland, Communities Scotland, Scottish and Highlands and Islands Enterprise and the wider network of Local Enterprise Companies, Careers Scotland and the network of high quality providers. But we could move forward further and faster.

If the focus of trade union led learning activity is to continue to move beyond capacity building into making full use of ULRs and union influence on learning activity in the workplace, a revolution in union learning will be required. It is the aim of the STUC and TUC to achieve the mass take up of learning and skills in workplaces throughout Scotland. To achieve such a step change, union led learning activity has to be able to access mainstream funding.

Section Four

Developing the Union Learning Institution/Academy – key challenges

4.1 There are a number of key issues, problems and barriers that need to be tackled if we are to move forward.

- *Brand and title* Establishing a strong, high profile, coherent “Union Learning” brand is vital. A major problem is the somewhat fragmented and confusing range of different union learning services. Working people and employers should feel able to recognise and support a clear, simple concept – in the same way that the Open University has established itself as a brand leader. The Institution/Academy should have one clear identity across Scotland.
- *Ownership and union buy-in* It is vital that unions and other key stakeholders feel a strong sense of ownership. The Institution/Academy must neither be seen as the property of the STUC, TUC, nor as a quasi/government agency. This will require great care and sensitivity. Many unions, for example, may wish to retain an element of their own “branding” while also benefiting from the strength of a single union brand.
- *Partnerships for delivery* The current network of colleges, universities and other providers has been very carefully built up over the past decade and more. The TUC Education Service has carefully selected college providers and trained tutors, who go on to be employed by Colleges in their TU studies departments. High quality provision must remain paramount, if the image of the “Union Learning” brand is not to suffer.
- *Partnerships* Having strong strategic partnerships with e.g. the Scottish Executive, Scottish Enterprise, Highlands and Islands Enterprise, SQA, SCQF, OCN, SUFI, and the Open University will be crucial, as will partnerships with Sector Skills Councils. Geographical partnerships, with LEC’s, Community Learning Partnerships, etc will also be required. Finding the time, effort and skill required to manage these partnerships is a problem likely to become more acute as the whole system grows. The

Institution/Academy will need to manage a complex web of relationships while being very clear and transparent in the role, services and expectations sought from partners.

- *UK-wide issues* While part of a UK wide approach to union led learning, the structure and delivery mechanisms of the Institution/Academy will require to operate within the context of devolved government and union structures in the UK. It is envisaged that a central body that provides management and support will be necessary. This will need to be sensitive to the distinctive roles and structures of the STUC and TUC. The Institution/ Academy will require to ensure equality of provision within the context of the Scottish funding and delivery framework, policy and partnerships.
- *Funding* Currently, funding for union led learning in Scotland is provided through a mixture of funding sources including the Scottish Executive (SULF); the Scottish Funding Councils (FE colleges); Scottish and Highlands and Islands Enterprise (STUC LLU); the TUC and unions themselves, the EU and a number of other agencies. How these sources of funding relate to the funding required by and accessed through the new Institution/Academy will be crucial. How it will grow new funding streams e.g. from employers and others will also be key. It will need to oversee a growth in the proportion of their resources that unions devote to providing learning services. Managing sustainable funding streams, costing and pricing provision, funding innovation and other central services such as accreditation or marketing, will all become more complex and much larger scale activities.
- *Governance and management* Overcoming fragmentation and persuading unions fully to support the Institution/Academy are major challenges. All stakeholders, but particularly the STUC, TUC and unions, will need to be involved in governance and management. Clearly a balance will need to be struck between broad strategic governance and closer management, while maintaining the highest standards of accountability for public and private (union or employer) funding. Again, this will mean developing appropriate structures but also working with great care and sensitivity to establish a sense of shared ownership.

- *Curriculum* It is envisaged that the Institution/Academy will allow access to a wide range of courses, from everyday skills programmes through to degree level courses, and from courses that are directly job related to those either more generic or focused on personal development. The Institution/Academy will require to ensure that the courses it offers meet the needs of union members, industry and the wider labour market. It must be responsive to the demand for small “bite size” learning opportunities, working closely with providers and accrediting and awarding bodies in this regard.
- 4.2 The process of accrediting small “bite size” learning, will help considerably in growing more flexible, tailored courses – and accrediting much of what already happens informally.
- 4.3 The development of the SCQF offers a real opportunity for learners accessing learning through the union route to progress their learning. It will be a challenge to ensure that the provision offered through the new Institution/Academy fits within the framework.
- *Quality assurance* Currently, all TUC and most union courses are accredited, usually through the NOCN. Building a bigger “Institution/Academy Portfolio” with more accreditation routes will be a major task. Courses offered in Scottish FE colleges are accredited by the SQA and other bodies. In HE quality is assured by the QAA. The Institution/ Academy should aim to ensure all courses it offers and all provider partners are of demonstrably high quality, i.e. fully accredited and inspected. An effective relationship between the Institution/Academy and accreditation partners and awarding bodies operating in Scotland will be essential.
 - *Staffing issues* The Institution/Academy should aim as far as possible, to be a small, central body. Staff delivering training should continue to be employed by providers. Institution/Academy staff will need to oversee accreditation and quality; innovation; course development; relationships with stakeholders; funding, marketing and strategic management. The STUC, the TUC and unions themselves currently employ staff engaged in those areas but much work would need to be done to create a new central structure.
 - *Marketing* There is a need for an analysis of a potential market, and how it segments and what working people actually want or could be encouraged to want from learning. This should assist in identifying both clear messages that work for people and new ways of reaching

wider audiences. These messages need to be simple, couched in a stronger vision, given a clear associated brand image, a much higher profile and resonate positively with employers, government and other agencies.

- *Virtual or actual* We are currently exploring innovative ways of delivering learning, or advice and help about learning. However this is all somewhat patchy and rather small scale, the potential for innovation is not being realised. There is scope to grow this kind of “blended” mix of face-to-face and e-learning very substantially. The Institution/Academy could also experiment with innovative new ideas (e.g. using mobile telephony) on a scale that we cannot currently attempt.
- *Research and innovation* A Union Learning Institution/Academy should provide a test-bed for piloting new ideas whether these arise from government, government agencies, other partners or unions themselves. By providing a quick route to potential learners, it should speed up the process of testing, evaluating, adapting and mainstreaming. It should also have a strong research base, building on unions own research departments and current partnerships, to establish knowledge transfer networks in conjunction with H E providers.

Summary

Unions, the STUC and the TUC are making good progress in tackling these learning issues. That is why the scope and range of union learning continues to grow. However there is no doubt it could grow much more quickly if some of the barriers outlined above could be tackled more effectively. Some of these problems are a consequence of having grown fairly quickly; others reflect more deep-seated cultural attitudes among employees and employers.

Section Five

The Feasibility Study

5.1 The proposed study is seeking to test out whether it would be feasible to develop a new Union Learning Institution/Academy (as described in section 2) that would be able to:

- build on and bring coherence to existing STUC, TUC and union learning activity under a new powerful single brand identity;
- add value in terms of achieving a step change increase in the number of workers currently engaged in learning, thereby contributing to the key objective of the Scottish Executive's Lifelong Learning Strategy and Smart Successful Scotland to raise the demand for skills;
- demonstrate through a sound business case, the capacity to generate the necessary income to support a development of this kind;

5.2 In particular, the study would need to examine the following issues and barriers and offer advice on how best these should be addressed.

5.3 Brand and title

The brand needs to demonstrate ambition, vision, imagination and collective union values whilst reaching out to a wide range of individuals and audiences. It needs to be a single brand, but enable unions to maintain their identities within it.

What brand and title could achieve these objectives? What kind of resources and approach should be devoted to marketing?

5.4 Scope and Scale

How ambitious should these plans be? For example, what are broad figures for the numbers of learners that might be attracted, qualifications gained, number and type of educational partners, including work based learning centres? How long would it take to set up a new institution and what would the key milestones be?

5.5 Funding

What would a funding model for the Institution/ Academy look like? What core funding would be required to operate the central management and support body and where would it come from? What would be the implications for FE and HE funding in Scotland of the increased demand for courses to be accessed through the Institution/Academy? How would current funding streams and activity accessed by the STUC, TUC and unions (e.g., SULF, Scottish and Highlands and Islands Enterprise funding; funding from Communities Scotland, EU funding, etc.) relate to the Institution/Academy?

What are the implications of ILA's Scotland?

What is the potential for SSC contribution? What costs might reasonably be carried by the unions? What would employers contribute and through what mechanism?

What would the main considerations be in exploring pricing and charges?

Might future changes to sections 343 and 344 of the Income Tax Earnings and Pensions Act (and previously Section 201 of the ICTA 1988) currently under consideration, assist and encourage unions to embed this work in their core activity?

5.6 Ownership – Union buy-in

The STUC and TUC Education Service in Scotland currently coordinates or supports union led learning, some unions have their own discreet trade union education programmes, and a number have SULF supported initiatives. The Institution/Academy model envisages a more collaborative approach within a union wide framework that is coherent and supports quality

How could the new organisation be structured so as to maximise union engagement, increase coherence and collaboration, but at the same time allow a degree of union flexibility and joint branding?

5.7 Partnerships for delivery

What would the impact of the Institution/Academy be on current STUC, TUC and union partnerships with providers?

How could the Institution/ Academy be best organised to strengthen partnership arrangements and increase unions' (and, jointly, employers) bargaining power with providers? What new partnerships would be needed?

How should new partnerships be established and what form of agreement/contract should underpin all arrangements with providers?

How could these new arrangements retain flexibility at local level?

5.8 Partnerships

What existing strategic national partnerships and what local and operational partnerships would need to be strengthened and what new partnership developed? How could these be best co-ordinated? What would be the key strategic and operational partnerships?

What services/advice/facilities/resources could be offered directly by partner organisations and what kind of agreements/contracts might underpin them?

5.9 Employers

What should be the link between the Institution/Academy and employers? How could they access training through this route and what should be the relationship with non-union employers?

How would employers and SSCs interact with the Institution/Academy? How much influence would they have on what is delivered?

How could a funding contribution best be levered in from employers?

How might this development strengthen other partnerships with employer organisations?

5.10 Governance and Management

What would be the most appropriate Governance/Management arrangements for the Institution/Academy, given the roles and structures of the STUC and TUC? Should this development sit inside the STUC/TUC or should it have a new legal entity? If the former, what would the implications be for the STUC and TUC? (e.g. financial risk, demand on central resources) If the latter, what structure might maintain STUC, TUC and union ownership, within a separate entity?

If a separate entity, how could it avoid becoming remote from STUC/TUC and union concerns over time?

How could it maintain the responsiveness to STUC/TUC and union policy developments and demands?

How could it deal with strategic and managerial issues and at the same time be informed by ULR and union experience at workplace level?

What would a Board or governing body look like and what would be its responsibilities? What kind of legal framework would be needed?

5.11 Curriculum

The Institution/Academy would build a systematic approach to learning that encourages progression (horizontal and vertical) in the context of the SCQF. Once through an initial gateway, learners would be helped through initial assessment and with further information, advice and guidance to access the framework at the right point for them.

What infrastructure and systems would be required to integrate provision offered through the Institution/Academy with the SCQF?

What courses should the Institution/Academy offer? How will it ensure that the needs of union members, industry and the wider

labour market are met? What role will it have in developing new learning programmes including “bite sized” learning?

How can we expect the interplay of demand/provision to change over the next 3,5 and 10 years and what are the implications for curriculum and funding?

5.12 Quality Assurance

What would be the framework and mechanism for QA? (assuming the institution would not itself seek awarding or validating body status)

Would this be through a variety of awarding bodies? Should there be packaged and bespoke branded STUC, TUC and union awards and qualifications?

How will the Institution/Academy ensure quality of learning not accredited through awarding bodies?

5.13 Relationship with a Wales/England/NI/UK organisation

Given that Scotland has a different funding and policy structure, but that there is a need to maintain a UK wide approach to union led learning activity, should there be a discrete Scottish Institution/Academy or should there be a Scottish regional body operating within a UK organisation?

If there should be a discrete Scottish body how could a UK union-wide coherence be maintained? How should it relate to similar bodies operating in the rest of the UK and NI? What governance structure, staff, etc would be required?

How could a Scottish body maintain coherence with UK stakeholders whilst meeting Scottish priorities?

If a Scottish body sat within a wide UK organisation how would a strong Scottish identity be maintained? What governance structure, staff, etc would be required? How would Scottish stakeholders be engaged? How would the different funding and policy environments be accommodated?

What would be the division between Scottish and UK wide functions in either structure?

5.14 Staffing Issues

What would the options be for staffing the institution?

How would it relate to current staffing structures within the STUC, TUC Education and individual trade unions?

5.15 Virtual or Actual

Given the need to be accessible to people whether or not they can reach a physical location, how would the new organisation deploy technology to broaden its reach whilst playing to the strengths of peer group support and collective activity?

Would there be a physical HQ? If so where should that be?

5.16 Timeframes

If we are to develop a new learning institution what would be a realistic timeframe for such an endeavour? How would this timeframe fit with other/exisiting developments and funding opportunities?

5.17 Other

Are there other considerations, which would need to be addressed?

Section Six

Method

6.1 We do not wish to be overly prescriptive about the methodology for the feasibility study but asks contractors to describe how they would set about the task with a clear rationale for the recommended approach.

This should cover:

- how they would address all of the issues/areas identified in Section 5;
 - the procedures they would employ to ensure the views of all the key stakeholders are taken into account, including unions, learning providers and employers;
 - the data collection methods they would use;
 - their proposals on how best to develop a business case, based on available and reliable data, which would provide a sound basis for estimating the set-up and running costs of the proposed Academy, together with an analysis of the potential income streams.
- 6.2 The STUC/TUC will provide the successful contractor with a list of key stakeholders to be consulted and with help in consulting affiliate unions.
- 6.3 The study must take account of the complementary study commissioned by the TUC on the creation of the Institution/ Academy. This is being conducted by:

OPM,
252b Gray's Inn Road,
London
WC1X 8XG

Section Seven

Staffing

- 7.1 Contractors should provide details of the relevant experience of the individuals who will work on the project, together with an explanation of their role and relative inputs. Similar information should be provided for any proposed sub-contractors.

Section Eight

Timing and Outputs

8.1 We aim to appoint the successful contractor as soon as possible and at the latest by early October 2004.

The required outputs are:

- an interim report by end of November 2004 that gives initial findings on the potential feasibility of the proposed Institution/Academy
- a final report by end of January 2005 that presents a detailed analysis on the feasibility of the proposed Institution/Academy and recommendations on how best to develop a business case, based on available and reliable data, that would provide a sound basis for estimating the set-up and running costs of the proposed Academy, together with an analysis of the potential income streams.

Section Nine

Project Management

- 9.1 The STUC and TUC will manage the contract on behalf of a wider stakeholder group. The Project will be overseen by a steering group, consisting of representatives drawn from the STUC, TUC, the Scottish Executive, HE, FE and trade unions. Other organisations may be invited to join the Steering Group as appropriate.

Section Ten

Costings

- 10.1 The STUC and TUC will not enter into discussions about the budget for the project but organisations may if they wish present a range of cost options. Non-cost aspects of this specification can be discussed with Grahame Smith at the STUC or Harry Cunningham TUC Education Officer in Scotland.

Section Eleven

Selection of Tenders

11.1 Tenders submitted in response to this invitation will be assessed against a range of criteria. In general terms, these include:

- Understanding of the context and aims of the study
- Coverage of the aims and issues
- Method - quality and suitability of the proposed method for meeting the aims of the study
- Staffing - the expertise/relevant experience of staff, their roles and inputs to the project
- Timing - evidence of considered timetable/ability to meet deadlines
- Cost - required budget/value for money

STUC
The Scottish Trades Union Centre
333 Woodlands Road
Glasgow
G3 6NG

TUC Education Service in Scotland
John Smith House
145 – 165 West Regent Street
Glasgow
G2 4RZ

24 August 2004

