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# Literature Scan

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**The role of Learning Reps and mentoring in  
engaging employees in workplace training**

**Prepared for  
Careerforce**

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**5 August 2013**

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## Introduction

This brief literature scan was undertaken to update the literature used to inform the *Evaluation of the Learning Representatives Programme* (Heathrose Research, 2011). It will also be used to inform the evaluation of the Careerforce Learning Reps programme. The literature includes research, articles and media resources that could be sourced electronically. It has been limited to material that has been written since 2010. It includes literature about union learning representatives; embedded literacy and numeracy in industry training in workplaces; and workplace mentoring.

### Union Learning

**Stuart, M., Cook, H, Cutter, J. & Winterton, J. (2012). Who stands to gain from union-led learning in Britain? Evidence from surveys of learners, union officers and employers. *Economic and Industrial Democracy*. 34(2) 227–246.**

This article explores the gains that are to be made through the union learning agenda in the UK. The evidence for the article comes from surveys conducted in 2009 and 2010. While all parties gain – the employees, the unions and the employers – their interests are not identical. The points of interest in this article include:

- Of the third of learners who experienced skills uplift, half did so by one level above their prior qualification, almost half increased by two levels and almost one in ten by three levels
- Just over a third (34%) of union activity was directed at specific ethnic, migrant or minority worker groups in order to raise demand for learning among under-represented groups
- Unions have sought to embed policies for learning within wider union activities
- Eliciting employer support was reported to have been far from straightforward with the main issues relating to engaging employers around learning agreements and time off work for learning
- Employers reported that there was an increased demand for learning from those who had no history of previous learning and even higher level of demand from those with poor basic skills. This ultimately resulted in more equitable practices related to training opportunities
- While the majority of employers reported no change to organisational performance around a third thought there had been changes to organisational performance; service/quality indicators; and health and safety.

**Cassell, C. & Lee, B. (2012). Driving, steering, leading, and defending: Journey and warfare metaphors of change agency in trade union learning initiatives. *The Journal of Applied Behavioral Science* 48(2) 248–271.**

This article explores the idea (or metaphor) of Learning Reps as change agents. The evidence for the article comes from four case studies, two in the UK and two in NZ.

The idea of change agent is usually associated with managers or people in positions who are able to effect change within and organisation. However this article makes the case that Learning Reps act as change agents for individual learners

The research uses seven metaphors associated with the Learning Reps role and each metaphor has implications for the ways they work as change agents. The roles are outlined in the table below that is taken directly from the article (p.264).

**Table One: Metaphors for Learning Reps**

<b>Metaphor</b>	<b>Change Agent Role</b>	<b>Action focus</b>
Journey	Guide, driver	Steering, driving, and progress chasing the initiative in a given workplace, regionally or nationally
Fishing	Recruitment	Encouraging workers to become involved and bringing in new learners
Machine	Facilitator, engineer	Ongoing maintenance of the initiative as the journey progresses. Paying attention to the smooth and regular running of learning opportunities, etc
Freedom	Liberator, nurturer	Generating appropriate and stretching learning opportunities for individuals; Looking after individual learners as they go through the learning process
Warfare	Strategist, leader, negotiator	Planning for the future bearing in mind the industrial relations history and climate. Negotiation of learning agreements and learning resources with management
Building	Protector, builder	Ongoing development of the initiative. Seeking ways of making it stronger, for example, by encouraging new groups of workers to become involved or building support from other trade unionists
Organism	Defender	Protect from ongoing harm

This article also referenced literature that highlights the positive findings to date on the impact of Learning Reps including:

- influencing training in the workplace
- encouraging new learners so that they become confident enough to participate in learning
- acting as advocates for learning.

**Jameson, H. (2012). *Making skills work: Trade unions and their role in optimizing the use of skills in the workplace*. IPA.**

The report draws on evidence from case studies in three workplaces and looks at how unions can position themselves so that they can build a role to influence workplace practices, business strategies and skills acquisition. The research also reviewed recent developments on the policy discourse around skills utilisation, meaning the extent to which the skills available in the workplace are used effectively.

The points of interest in this report include:

- There are three sets of practices that can be used to improve skills' utilisation:
  - Matching skills available with skills needed
  - Creating more opportunities for employees to use a wider range of skills
  - Creating conditions that improve the motivation of employees to use their skills
- Integrating the union learning agenda into the organisation's learning and development strategy was a prerequisite. This approach meant that there was a partnership approach between employers and employees and as a result employees felt that they had more discretion over their skill use
- Where there was high trust relationship unions were in a position to influence the skills agenda, job design and progression in workplaces
- Unions were also able to offer suggestions to employers about the challenges of implementing changes in the workplace
- Workplaces need to provide the conditions in which employees can be motivated and supported to use their new skills. Where this happens there are benefits for employers and employees
- Skills such as literacy, numeracy and IT are required in most jobs and easy to integrate into jobs and as such there are benefits for performance, productivity and health and safety. These skills also enable and empower workers to participate more fully in the workplace and get roles where they are likely to use more of their skills.

**Clough, B. (2012). *The role and impact of unions on the learning and skills policy and practice: a review of the research*. Research Paper 16. Unionlearn.**

This report summarises the main findings and themes resulting from recent research on union learning.

The points of interest in this report include:

- Union learning has successfully engaged workers with low qualifications and around half of those who participate have moved on to higher levels of study
- The most significant impact has been on the uptake of basic skills training including literacy, numeracy and ICT
- There are barriers for employees and union learning reps when they are not given paid time off work to learn or to organize learning
- Skills utilisation and raising awareness of this with employers is becoming an increasingly important part of union work
- Some employers reported that union learning has resulted in changes to improved organisational performance
- There can be difficulty sustaining activities but the chances are increased when there is a partnership between management and unions, the existence of a learning committee and the establishment of a learning centre.

**Ross, C., Kumarappan, L., Moore, S. & Wood, H. (2011). *Learning journeys: Trade union learners in their own words*. Research Paper 16. Unionlearn.**

This report highlights the impact of union learning on workers. The evidence is taken from in-depth interviews with 42 learners who had some connection with unionlearn or trade union education. The points of interest from the report include:

- Programmes attract learners who might not otherwise participate in learning
- Engagement with learning can act as a catalyst for further learning
- Supports people in their current jobs and can provide opportunities for career development
- Increasing confidence allows people to participate more fully in the workplace
- In some cases learning can be constrained by the demands of work and employers reluctance to allow people time off work to learn.

**Bacon, N. & Hoque, K. (2011). *Union representation and training: The impact of union learning representatives and the factors influencing their effectiveness*. *Human Relations* 2011 64: 387.**

This article reports on evidence from a 2007-2008 national survey of learning reps. It provides a more circumspect view of the impact of Learning Reps in workplaces compared to the other research in this scan and looks at factors associated with Learning Reps being able to perform their role effectively. The circumspect view comes from the fact that 26% of learning reps said that they had not had any influence on training levels and a further 13% said they had only had minimal impact.

The factors that support or impede the ability of Learning Reps to undertake their roles include:

- Time – paid time off work to undertake the role

- Financial support that provides for learning centres in workplaces, training for reps, learning agreements
- Managers' support, particularly when there are tensions with meeting production targets versus time for learning; or just allowing time off work for learning reps and employees to talk about training
- The need for facilities that enable learning reps to gather information about learning needs and communicate with workers about training opportunities
- The number of reps to the number of employees (those with fewer than 200 appear to be more effective)
- The experience of the learning reps (more experienced are likely to be more active)
- Whether their role is dedicated or a hybrid role (the hybrid was shown to be more effective).

**Ryan, R., Lomax, H. & Brooking, K. (2011). *An evaluation of the learning representative programme*. Wellington. Ako Aotearoa.**

This evaluation looked at the effectiveness and impact of the New Zealand Learning Reps programme. It included a literature review, document analysis, and case studies in seven workplaces. The evaluation concluded that:

- the programme has value in workplaces where managers and workers support the main aim that is to raise awareness of opportunities to access and participate in literacy and numeracy and industry training
- there were positive impacts on workers' attitudes to learning, which in turn led to improved literacy and numeracy skills and faster completion of qualifications, and improved skills resulted in workers being better equipped to do their jobs
- it takes time for Learning Reps to come fully up-to-speed with their role and for employers to understand or appreciate the benefits of Learning Reps
- it was difficult for the NZCTU to maintain and develop the programme in an environment of reduced funding and single-year funding agreements

**Stuart, M., Cook, H, Cutter, J. & Winterton, J. (2010). *Assessing the impact of union learning and the Union Learning Fund: union and employer perspectives*. Centre for Employment Relations Innovation and Change. Leeds University Business School.**

The report presents interim findings from a wide-ranging evaluation of the activities of Unionlearn and the ULF. The analysis draws specifically from two surveys. First, a survey of Union Project Officers (UPOs) leading projects funded through rounds 8-10 of the ULF. Second, the largest ever survey of employers' experiences of and attitudes towards union learning activity. The key points in the report show there was reported evidence that:

- company policies on workplace learning showed improvement
- increased learning opportunities were being taken up and the quality of learning had improved in some places

- skills gaps were being addressed
- the work was reliant on the support of employers
- barriers to activities included the lack of time for employees to take up training; lack of time for union reps to fulfill their roles
- employers had not increased the amount they spent on learning.

## Mentoring in the workplace

**Sanders, M., Smith, A., Norsworthy, B., Barthow, S., Miles, L., Ozanne, P. & Weydeman, C. (2012). *Five habits for effective mentors*. Wellington. Ako Aotearoa.**

This research was conducted with 16 participant pairs in early childhood education settings (associate teachers and student teachers) and 11 counselling settings (supervisors and student counsellors). It concluded that support and professional development are essential for mentors to be able to do their job effectively. An effective mentoring role consists of:

- building a two-way relationship in which each gets to know the other's values, beliefs, aspirations, role, ways of working
- engaging in learning dialogue about theories that underpin the ways of working
- being intentional and taking a structured approach to mentoring
- making time to mentor, observe and talk
- mentors valuing the role, realising the complexity of it and the time it takes to fully develop the skills

**City and Guilds Centre for Skills development. (2010). *Enabling workplace learning through coaching and mentoring*. Series Briefing Note 22.**

This paper notes the importance of coaching and mentoring in workplaces to enhance learning and the positive impact it has on both the mentors/coaches and the employees who have been mentored. Mentors are seen as being particularly beneficial for employees who have recently undertaken training as they can help them to practise what they have learnt. The factors that contribute to successful mentoring programmes included:

- organisational buy-in and commitment
- time for mentors to train, meet and reflect with other mentors, and work with employees
- mentors playing an enabling role with employees.

The paper described four types of mentoring relationships.

- Highly structured short-term – e.g., for orientation
- Highly structured long-term – e.g., preparing someone to take over a job
- Informal, short term – e.g., spontaneous, occasional, as needed



- Informal, long-term e.g., being available when needed to talk through problems, share knowledge

**Holland, C. (2009). *Workplace mentoring: A literature review*. Wellington. Ako Aotearoa.**

This research, a literature review, looks at mentoring in the workplace and the approaches and conditions that support outcomes for workers. These include:

- A mentoring model that works from the perspective of the “valued equal”, develops from a relationship built on trust, and looks to work with the whole person rather than just on the learning outcomes for the trainee
- Mentors require professional development to undertake their role (the literature suggests two half-day sessions)
- Mentors need time to undertake their role
- Mentors and mentees need to be carefully matched
- The things that get in the way of mentoring programmes include time and production factors, lack of organisational support, and attitudes of the trainees and mentors
- There are benefits for mentors themselves and their organisations
- Mentoring is important for trainees with literacy and numeracy needs, but mentors need specific training and skills that enable them to do this
- Trainees benefit from support they get from others as they learn and try new things out in the workplace.

### **Embedding literacy and numeracy in workplace training**

**Ryan, R., McDonald, H., Sutton, A. & Doyle, S. (2012). *Formative evaluation of ITO embedded literacy and numeracy projects*. Wellington. Department of Labour.**

This evaluation was conducted to find out the processes that were being used by ITOs to embed literacy and numeracy into industry training and the early impact of these processes. The points of interest from the evaluation include:

- The importance of understanding the literacy and numeracy requirements of job roles
- The need to diagnose trainees’ literacy and numeracy needs
- The importance of embedding literacy and numeracy activities into training resources
- The need to build the capability of all those involved with training, including workplace assessors and those who support training in the workplace
- The need to engage employers with industry specific information

**Sligo, F., Tilley, E., Murray, N., Watson, B., Comrie, M. & Vaccarino, F. (2010).  
*Modern apprentices literacy learning: A formative evaluation.* Wellington.  
Department of Labour.**

The evidence for this evaluation came from a literature review, data on almost 200 apprentices who were receiving additional literacy and numeracy support to help them complete apprenticeships and case studies in 14 workplaces. The evaluation concluded that there were better outcomes for the apprentices when:

- there was a three-way collaboration between the literacy tutor, the modern apprenticeship co-ordinator and the employer. Together these three provided a network of support for the apprentice
- there was one-to-one tutoring in a non-classroom approach
- the literacy tuition was relevant to / in the context of the vocational learning

In addition to these factors was the need for the workplace to have culture of learning and be positive about literacy learning. There needs to be supportive employers who understand the role of literacy in the workplace and the potential it has to contribute to productivity and who provide time for apprentices to do some of their bookwork on the job.

## Conclusion

The literature in this brief scan on union learning and mentoring in the workplace shows that Learning Reps improve the opportunities, uptake and likelihood of completion of learning programmes. It works best when there is:

- an organisational culture that values learning, and when organisations provide time and resources to support Learning Reps
- when there are high trust relationships between all parties – the workplace, the union, the Learning Reps, and the workers
- when mentors have the requisite skills, build meaningful and trusting relationships with fellow workers, and provide them with support that allows them to question and practise new learning in the workplace.

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