

Tertiary Education Report: **Learning Representative Initiative pilot - evaluation**

Executive Summary

- 1 The Learning Representatives Initiative (the initiative) was established through Budget 2004 as a project designed to create greater awareness of industry training and workplace learning. The aim was to select and train people from the workplace to advocate learning among their peers to enhance skill levels and improve workplace productivity.
- 2 The New Zealand Council of Trade Unions (NZCTU) was contracted by the Tertiary Education Commission (TEC) to implement a pilot of the initiative between 2005-07. The TEC has now undertaken a review of the implementation of that pilot, as required in the Budget 2004 initiative. Findings of the review will inform contract negotiations with the NZCTU on the roll-out and any further expansion of the initiative.
- 3 In general, the implementation of the initiative pilot has been a success. After a slower than expected start, the initiative pilot is now running effectively. The specific targets in terms of numbers of trainees have been met. Expenditure on the project is within budget.
- 4 Through the initiative pilot, it has become clear that there are several major barriers to workplace learning that workers face, including literacy issues, fear of the classroom and some employer resistance, although this latter issue seems to stem more from uncertainty about the initiative than antagonism to workplace learning per se. Regardless of the barriers, the initiative programme has been successful in raising awareness of workplace learning in sectors where such learning activity has been minimal.
- 5 Although it is still too early to be able to undertake a comprehensive assessment of the effectiveness of the initiative, anecdotal evidence suggests it has the potential to be one of a number of effective tools for increasing and enhancing workplace learning.
- 6 From the commencement of the pilot, it became clear that this could be a useful mechanism for helping to address the significant literacy and numeracy problems within some parts of the workforce. Through Budget 2008, the government has agreed to provide a further \$0.500 million per annum (GST exclusive), to refocus the initiative on literacy, language and numeracy and to increase its reach into New Zealand workplaces. This takes total funding for the initiative to \$0.767 million per annum (GST exclusive).
- 7 The TEC will be working with other agencies and social partners to embed the initiative within the overall Skills Strategy with a specific focus on how it can best add value to addressing literacy and numeracy needs.

Recommended Action

8 It is recommended that you:

- a) **Note** that the Learning Representatives Initiative was established to create greater awareness of industry training and workplace learning, and to enhance skill levels and improve workplace productivity through recruitment of learning representatives who are champions of workplace literacy;
- b) **Note** that the Tertiary Education Commission contracted the New Zealand Council of Trade Unions to undertake a pilot of the Learning Representatives Initiative between 2005-07;
- c) **Note** that the Tertiary Education Commission has undertaken an evaluation of the implementation of the pilot;
- d) **Note** that the evaluation has concluded that the Learning Representatives Initiative was implemented successfully and has met all targets;
- e) **Note** that there is anecdotal evidence that the Learning Representatives Initiative has had a positive effect on workplace learning;
- f) **Note** that there is potential for the Learning Representatives Initiative to be used as a means of helping to address literacy and numeracy needs in the workplace;
- g) **Note** that the government has agreed to increase funding for the Learning Representatives Initiative by \$0.500 million per annum (GST exclusive), through Budget 2008 to refocus the initiative on literacy, language and numeracy;
- h) **Note** that the Tertiary Education Commission will begin negotiations with the New Zealand Council of Trade Unions to roll out and expand the Learning Representatives Initiative from 1 July 2008.

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Purpose of Report

- 1 This paper reports the evaluation of the Learning Representatives Initiative pilot (the initiative). The purpose of this evaluation is to review progress to date with the establishment of the initiative pilot and identify areas for improvement for the next stage of the programme. This evaluation was agreed and funded as part of the original Budget 2004 initiative. The evaluation methodology is set out in Appendix 1.
- 2 The results of this evaluation will be used to inform the Tertiary Education Commission's (TEC) contract negotiations with the New Zealand Council of Trade Unions (NZCTU) on the roll out and potential expansion of the initiative.

Background

- 3 The Learning Representatives Initiative was established as part of Budget 2004, and received funding of \$0.267 million per annum (GST exclusive) [CAB Min (04) 13/3 (24)]. The initiative pilot project was contracted by the TEC to the NZCTU, to be delivered between 1 July 2005 and 30 June 2007. This was later extended to 30 June 2008.

Learning Representatives Initiative pilot objectives and outcomes

- 4 The overall objective of the initiative project is to create greater awareness of industry training and workplace learning. A number of key objectives and outcomes were agreed between the TEC and the NZCTU. The key objectives as agreed are:
 - awareness raising and promotion;
 - training support and delivery;
 - project development;
 - analysis and research.

Progress against the key Objectives

Awareness raising and promotion

- 5 NZCTU reports that there has been widespread approval of the concept, from around 3000 workers. While awareness of the project has been widespread and there has been a high level of support, this has not been universal. A number of employers, and even Learning Representatives themselves, reported that they didn't fully understand the project or the specific role of a Learning Representative during their initial engagement with the initiative.

Training support and delivery

- 6 The NZCTU became an approved and registered private training establishment in 2005. By November 2005, a preliminary training programme was approved, and three unit standards relating to the skills and knowledge needed by Learning Representatives were registered on the National Qualifications Framework and assessment guidelines and trainee books produced.
- 7 The first formal training session for Learning Representatives were held in Auckland on 29-30 November 2006 for the rail and ports sectors. To date 106 employees are now registered as Learning Representatives. Over 2007, there were 10 student intakes. There were also three groups who participated in the programme through distance learning during 2007.
- 8 The initiative received the Adult and Community Education Week Innovative Provider award in 2007.

Project development

- 9 Throughout the course of the pilot, the initiative was introduced to a wide variety of workplaces, including:
 - New Zealand Ports
 - Westland Milk Products Dairy Workers' Union
 - Sealord
 - New Zealand Railways
 - WesleyHaven Age Care
 - IDEA Services Limited (IHC)
 - Cadbury New Zealand
 - Fonterra
 - Works Infrastructure
 - QRS Roding
 - O-I Glass
 - Southern Cross Stevedores
 - West Coast Mining
- 10 Industry specific material is being developed as the project continues. Tailored material is available relating to the mining, ports and rail industries, and specific material is also being developed for IDEA Services, Careerforce and the Seafood ITO.

Analysis and research

- 11 The project has collected information about the learning aspirations of workers and the barriers that limit access to workplace learning. Research on workplace progression and promotion has also been undertaken at an informal level.
- 12 One of the main objectives of this pilot was to find out what the role of Learning Representatives could be in the integration of work and learning, and this continues to be a feature of the project. This experience will feed directly into the implementation of the Skills Strategy.

Lessons

- 13 Through the initiative project, a number of issues relating to workplace learning and the implementation of the programme in workplaces were encountered which will provide lessons for the next phase of the project.
- 14 Commitment from employers to the initiative is key to the success of the project. Ensuring that employers receive timely and appropriate information about the project and that the project is flexible enough to fit the needs of employers (as well as employees) will be an ongoing challenge.
- 15 Another important variable in ensuring the success of the project has been the development of ongoing support for Learning Representatives in the workplace once the initial training has been completed. The establishment of regular systems of support for Learning Representatives will be vital in the roll out of the next phase of the project.

Effectiveness of the pilot

- 16 It is still too early to be able to undertake a comprehensive assessment of the effectiveness of the initiative in terms of whether the programme has made an appreciable difference to workplace learning and workers productivity. However some intermediate evidence of more short-term outcomes has been gained through the interviews. The pilot has clearly made a difference for many of the Learning Representatives as individuals. In a number of workplaces, the initiative has encouraged workers to talk about their goals for further education.

Conclusions

- 17 After a slower than expected start, the initiative pilot is now running effectively. The specific targets in terms of numbers of trainees have been met. Expenditure on the project is within budget. Through the initiative pilot, it has become clear that there are several major barriers to workplace learning that workers face, including literacy issues, fear of the classroom and some employer resistance. Regardless of the barriers, the initiative programme has been successful in raising awareness of workplace learning in sectors where learning activity has been minimal. In general then, the implementation of the initiative pilot has been a success.
- 18 Through Budget 2008, the government has agreed to provide a further \$0.500 million per annum (GST exclusive), to refocus the initiative on literacy, language and numeracy and to increase its reach into New Zealand workplaces.

Next steps

- 19 The TEC intends to enter into negotiations with the NZCTU to roll out and further expand the initiative. There are however a number of challenges and issues which the TEC will need to see being addressed going forward. Specific procedural issues include the need for better up front information as well as the development of ongoing support in the workplace for Learning Representatives

Literacy and numeracy

- 20 As noted earlier, from the commencement of the pilot, it became clear that the initiative could be a useful mechanism for helping to address the significant literacy and numeracy problems within some parts of the workforce. The idea of using the initiative in this way received widespread support. This may slightly shift the focus of the initiative away from increasing awareness of industry training per se, however the Industry Training Federation is supportive of this shift, and sees a close alignment between the initiative and the separate work many ITOs are currently undertaking in this area. The Industry Training Federation is in the process of appointing a Literacy Project Manager.
- 21 One of the key priorities of the *New Zealand Skills Strategy* is building the literacy, language and numeracy skills of the workforce. The TEC will be working with other agencies and social partners to embed the initiative within the overall Skills Strategy with a specific focus on how it can best add value to addressing literacy and numeracy needs.

Appendix 1 – Evaluation Methodology

This evaluation is based primarily on a review of the progress reports from the NZCTU to date. In addition, face to face interviews were held with:

- NZCTU;
- Business New Zealand;
- Industry Training Federation;
- Wesley Care Community Services - management and Learning Representatives;
- IDEA Services – initiative co-ordinator and Learning Representatives.