

Branch Education Co-ordinators

Starter Pack

July 2018



Getting started

Your role as Branch Education Co-ordinator is vital in ensuring that activists and reps are trained and supported to carry out their roles effectively.

Your first task as a new branch officer is to sign up for Branch Education Co-ordinator training. This will give you the knowledge, skills and confidence to carry out this role and to enable you meet other branch education co-ordinators.

The purpose of this guide is to help you set up systems for co-ordinating and keeping records of learning in your branch and to signpost you to information to help you carry out your role.

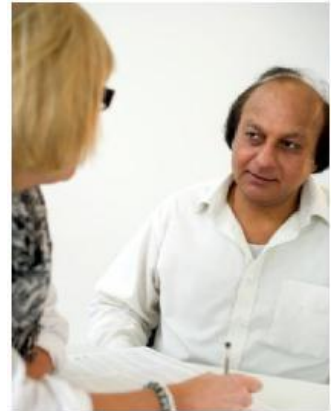
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What a Branch Education Co-ordinator does

The Branch Education Co-ordinator's role is set out in UNISONs 'Code of Good Branch Practice'. Your branch may also have a Branch Life Long Learning Coordinator with whom you should work closely.

****** The branch Education Co-ordinator leads on activist learning and the branch Lifelong Learning Coordinator leads on member learning.



Tasks relating to the post of branch education coordinator include:

- making sure all new stewards and reps receive information about the branch and their duties, e.g. stewards handbook, Rulebook, service conditions agreements, etc
- publicising the range of educational and training opportunities available to members and activists, and making sure that all reps complete appropriate training for their role
- talking to existing reps about their ongoing training and development needs;
- supporting and co-ordinating the work of buddies and mentors in the branch.
- co-ordinating and supporting the work of union learning representatives (only where a Branch Lifelong Learning Co-ordinator is not in place, if the branch does have a LLC then they will support ULRs).
- maintaining contact with the regional education officer/ regional learning and organising committee
- organising a plan of training for activists and producing an annual budget to meet its costs
- keeping records of who completes courses in the branch and when
- negotiating with the employer, along with union learning reps on issues relating to learning including time off

Training for Branch Education Co-ordinators

Signing up for Branch Education Co-ordinator training is your first step in getting started in your role. To apply for Branch Education Co-ordinator training or to find out when and where this course will next be delivered in your region, contact your regional education officer. UNISONdirect, Tel: 0800 0 857 857, can provide contact details for your region.

The Branch Education Co-ordinator course will provide you with the knowledge, skills and confidence to successfully carry out your role. After completing the course you will:

- Understand the role and function of branch education co-ordinators and the branch education team
- Understand the role of education and training in UNISON organisation development
- Be aware of the education and training opportunities available in UNISON
- Have explored ways of assessing the education and training needs of the branch, activists and members
- Be able to develop a plan for buddying and mentoring new workplace representatives
- Have experience of drawing up a branch education plan
- Know how to plan a branch education event and recruit participants

NB Once you are elected, do check that your branch has updated your WARMS record to note your Branch Education Co-ordinator status and that your contact details, particularly email if available, are correct.

Keeping Training Records

You will need to know who has completed training for their branch role in order to plan for future training and development for the reps and activists in your branch.



Establishing a Training Record

To start with you will need to get hold of the following lists:

- A list of all the activists in your branch on RMS (replacement membership system) in A-Z order of last name
- A list of all the activists in your branch on RMS in order of RMS Activist Role Code
- A List of RMS Activist Role Code numbers and what they mean

As most branches are now “live” on RMS through WARMS you should be able to get these lists locally.

Once you have these lists, contact your regional learning and organising team to get a copy of the AMT (activist and member training system) training history for your branch. You’ll also be able to get this report from WARMS in the near future so contact your branch WARMS user for this information when it’s available.

Then you need to systematically contact every activist in the branch to check:

- which posts they hold
- how long they have been in the post
- what trade union education they have completed during the last 5 years

To do this you may need the help of others in the branch, especially the branch Union Learning Reps (ULRs). In large branches, you will need help from all the senior stewards and Branch Officers.

This may seem an onerous task but this exercise will have the added benefit of introducing yourself to your branch activists and in turn they will know who to contact with any training queries they may have.

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As you make contact with activists you will need to record information to establish training history records and update the RMS records. To help you UNISON has produced a guide, **Developing and Supporting Activists**.

You can order a copy of the Guide via the UNISON Online Catalogue, Stock No. 2883, or download it from <https://learning.unison.org.uk/activist-training/branch-support/>. This contains the **Trained and Active** Plan which should be used to review the development needs of your branch reps and officers. An online PDF and Word version of this Plan can also be downloaded from the same webpage or you can order a **paper version** from the online catalogue, Stock No. 2919 <https://www.unison.org.uk/get-involved/in-your-workplace/key-documents-tools-activists/online-catalogue/>.

Setting up your own Record Keeping System

You may like to use the model Training Record Form at the back of this document to keep track of the courses each rep completes.

NB THIS IS A SIMPLE SYSTEM – FILE IN NAME ORDER – A SHEET FOR EACH ACTIVIST. You may wish to copy this to an Excel spreadsheet but remember you may not always be the Education Coordinator for the Branch. The person taking over from you will need to be able to use your system, so keep it simple and accessible for all.

You can file these forms with any Trained and Active Planning Forms, mentioned above, to keep a record of your meetings with activists, their training needs and any follow-up action agreed between you.

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Maintaining Training Records

Reps and activists must complete an application form for every course they attend and either you or the branch secretary will need to sign these to give branch approval to attend. As the section on managing the branch education budget below explains, this is important as giving approval to attend means the branch becomes responsible for participants' course costs, travel and subsistence. You should keep a copy of all application forms completed in the branch with the person's training record. It is good practice to contact course participants after their course to discuss how they got on and to ensure they have some opportunities to put what they learned into action.

Some regions use a 3-part carbonised action-planning form on certain courses on which participants record what they will do as a result of attending the course. Where you can, offer support and encouragement to them to complete these actions, or where you can identify with them some practical tasks they can carry out to get started, it is a great way to build their confidence and skills and help them get active in their role.

At the same time you can ask them to let you have a copy of any course attendance certificate they received for their training record.

If you have members attending TUC courses, it can take a while for course registers to reach UNISON and consequently for the training database to be updated. You can give them a copy of the UNISON Course Attendance Certificate from the back of this document to complete on the last day of the course and ask the tutor to sign it. The certificate should then be returned to you so that you can add it to their training record if you get a copy please scan it and send it in to the course administrator at your regional office so that the training database can be updated.

Data Protection and Keeping Records Securely

When representing members it is important to ensure that members' rights under the Data Protection Act (DPA) and the General Data Protection Regulation (GDPR) are upheld in every activity carried out. Members have the right to know that we are collecting and using information about them, and that their information is kept safely and securely. In addition, the member has a right of "subject access". This means that they can make a request to see and have copies of all relevant personal information UNISON is holding and using - this will include paper files and electronic files like Word documents and emails.

You will be collecting some sensitive information from the member during the representation process, and so it is very important to ensure the following:

- The member must be made aware that you will be collecting and recording information about them (sounds obvious, but we need to let them know this).
- Confidentiality and privacy are maintained at all times.
- Case forms and other relevant employment case documents are stored securely, and in a lockable cabinet.
- Electronic information should be password protected if possible.
- Paper forms should not be left in an open office, and computer screens should be locked when you are away from your desk.
- Only share the information collected with people who have a justifiable reason to see it.
- Consult your branch about how information should be filed in paper files/electronic folders so that any subsequent "subject access" requests from members can be dealt with efficiently.
- Do not commit to paper or electronic documents any opinions or other information that you would not wish the member to see.
- Check with your branch what system you must follow when you remove a file from a filing cabinet so that the branch can log and track where case files are at any time.
- Do not discuss confidential matters over the phone if you are in a public place or an open plan office – go somewhere private.

NB Requests from members for their personal data

A member may ask for a copy of their own personal data e.g. their case file. They may refer to this as a Subject Access Request (SAR). If you receive such a request, you should:

- Verbal Requests: tell them to write to the Data Protection Office at the UNISON Centre, 130 Euston Road, London NW1 2AY, and let them know that there is a fee which can be paid by cheque or postal order.
- Written Requests: Pass the request (letter, email etc) to the Data Protection Officer (using the details above) immediately so they can take it forward. The union has a legal obligation to respond to the member within 1 month so it is important that requests are forwarded quickly

Do not give your member information from their file as it will almost certainly contain the personal data of others, which you must not provide to your member.



Branch guidance on Data Protection can be found here

<https://www.unison.org.uk/content/uploads/2018/03/UNISON-Branch-Data-Protection-Handbook-updated-February-2018.pdf>

You are advised to complete the GDPR e-note as soon as possible. All reps and branch officers that deal with data of any sort need do this short (20 minute) on line course. The link to the e-learning page is <https://e-learning.unison.org.uk/>.

Planning and managing the branch education budget

Managing the budget

You should encourage all activists to undertake at least the basic training for their role. As they undertake more duties in the branch, then follow on courses and refresher courses can be considered. There should be no question about branch funds covering this training – it is a prime duty of the branch to ensure all of its members and activists are offered the opportunity to access UNISON education and branches should therefore budget accordingly.

You will need to authorise each course application and regularly report to the Branch Treasurer which branch activists have attended courses as the branch is responsible for any course fees, travel and meal expenses. The branch should also pay for overnight stays should the participant have practical travel difficulties. If a participant cannot attend the course because of dependant care issues the branch should look into how these could be alleviated (paying for extra time at day nursery etc). This is why it is important your records are accurate in the branch

Planning the Education Budget

The key fact to bear in mind when considering budgets is that learning comes into UNISON's Objective One – “building capability to meet the current recruiting, organisational and representational challenges” this is the union's number one priority.

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You should review branch training needs each autumn and liaise with your Branch Treasurer or branch officer team in line with regional processes to agree a branch education budget for the year ahead. Having up to date training records for your branch is the most useful starting point for this



There are many ways you can estimate spend on learning in the branch. Here are two examples to serve as illustrations. They both include a split between funds spent on educating activists and those spent on member education.

1. A Generic budget

This is an easy way of estimating expenditure if you have not been used to budgeting and are not sure how much things will cost or the exact demand over the coming year.

You can estimate that of the existing activists around 20% will need to attend a course and say that a notional £200 per episode will be required for course fees, travelling and subsistence expenditure. Therefore if you have 100 activists, $20 \times £200$ would give a budget of £4000.

You can estimate the branch will want to be involved in 5 Life Long Learning initiatives throughout the year and say that these episodes will cost around £200 giving a budget of £1000

This example produces a total budget of £5000 for a medium sized UNISON branch

Obviously you can experiment by varying the percentages and the notional amounts until you feel you have it about right for your branch – depending on its size, the number of activists, whether your employer is keen on the learning agenda etc.

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2. A Targeted budget

This is a more sophisticated way of budgeting. However, in order for this type of budget to work, you must have information at your finger tips, for example:

- how many of the existing activists need what kind of training and when?
- what will be the likely recruitment of new activists and what are the priorities shown in the joint branch assessment?
- how much will course fees, travelling and subsistence actually cost?

This type of budget will vary from branch to branch depending on size, number of activists and number of activists needing training.

For simplicity, in the example targeted budget that follows target numbers appear in brackets, fees are estimated at £20 per person per day and travelling is estimated at £10 per person per day.

If you are a new Branch Education Co-ordinator and / or Branch Lifelong Learning Co-ordinator you may need to discuss these ideas with your other branch officers – but please remember – learning forms part of UNISON first objective and therefore your budget needs to reflect this level of priority.

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Example of a Targeted Budget:

Activist Training : Initial basic Training Courses	Fees	Travel	Totals
Branch briefings for new contacts (10)		£150	
UNISON Organising Steward Course (5)	£500	£250	
UNISON Organising for Health and Safety Course (3)	£300	£150	
UNISON Branch Officer Development Programme (3)	£600	£300	
Activist Training : Follow on Courses			
UNISON Stewards Refresher (5)	£100	£100	
UNISON Representation Skills (3)	£180	£90	
UNISON Mentoring (2)	£180	£90	
UNISON Organising Skills (4)	£240	£120	
TUC Stage 2 Health and Safety (1)		£150	
Total for Activist Training			£3,600
Resources			
LRD Employment Law book(12)	£300		
Case worker 'Kit' folder paper pen (12)	£120		
Mentor/Mentee 'kit' (12)	£120		
Total for resources			£540
Life Long Learning			
Learning at Work Day event	£250		
Travelling for (10)places on Saturday learning club events	£250		
Women's Lives for (15) branch/employer partnership	£150		
Taster for (10) Polish workers in Laundry – Conversational English	£150		
iPad as prize for branch 'best' learner award	£350		
Total for Lifelong Learning			£1,150
GRAND TOTAL			£5,290

Developing and Supporting Activists



The most effective way you can support new and existing reps is by encouraging them to complete training and to then make it as easy as possible to put what they learn into practice. The '**Developing and Supporting Activists Guide**' has lots of ideas on supporting reps to get to grips with their role and get active in their workplace - Stock No. 2883 from the Online Catalogue or download from <https://learning.unison.org.uk/activist-training/branch-support/>.

It offers ideas on:

- Keeping track of training in your branch
- Setting up a buddying or mentoring scheme in the branch to support new reps
- Holding catch up meetings with existing reps
- Working with branch officers and your regional organiser to develop a branch training and development plan

Whether you co-ordinate a system for developing and supporting reps in your branch or work directly with them yourself, the new **Trained and Active planning form** will help to structure meetings with reps and maintain a record of what was discussed so you can follow up on progress. It is available:

- As an **online Word version** that you can enter on to and save/share as needed <https://learning.unison.org.uk/activist-training/branch-support/> there's also a PDF version available.
- As a **paper version** to order from the online catalogue, Stock No. 2919

Training for activists

Which courses should activists take first?

UNISON is keen that all reps receive basic training for their role as soon as possible after election and certainly within six months. As they take on more duties in the branch, then follow-on courses and refresher courses can be considered.

For those activists who undertake representation work and handle cases in the branch UNISON requires that they take appropriate refresher courses at least every five years. You can find out from your regional education officer which courses are offered as refresher training in your region



For those activists who undertake representation work and handle cases in the branch UNISON requires that they take appropriate refresher courses at least every five years. You can find out from your regional education officer the dates that refresher training is offered in your region.

All newly elected workplace stewards are sent a link inviting them to complete the New Stewards e-note, this is basic introductory training in which they: Learn about the role of the steward in UNISON; Get signed up to training; think about their first steps in the role. Reps access this via <https://e-learning.unison.org.uk/>. Reps should then sign up for the Organising Steward course as soon as they can. The course has recently (Jan 18) been re-designed to cater for newly elected and less experienced UNISON stewards. The Stage 1 course is part one of a steward's initial training and will help equip them with organising skills understand the role of an organising union, on the course they will learn how to: work with members and more experienced stewards to resolve issues; know where and when to seek advice and guidance; recognise the importance of equalities in UNISON; understand how procedures work in practice; understand the broader roles in which UNISON operates and to plan their next steps in UNISON.

For those who would like to go on to

15 develop their representation skills, we

recommend Stage 2 of the stewards' training on which stewards will learn how to: identify what is and isn't a case; understand available resources to help representation i.e. the Acas code; practise interviewing witnesses; prepare for a grievance and a disciplinary case; build confidence in representation.

As most regions are running this course over five days stewards will be signing up for both parts. Please see your regional education programme for details of how the course will be run in your area.

Once a workplace rep has completed UNISON's Organising Steward course or a refresher course, they will be given ERA certified steward status (Employment relations Act). You will be able to find out from your branch WARMS (Membership database) records who needs to complete basic training to achieve ERA certification status and who needs refresher training.

There should never be any question about branch funds covering this training: it is a prime duty of the branch to ensure all of its activists and members are offered the opportunity to access UNISON education and branches should therefore budget accordingly.

Finding out more about training

- **UTrain:** Reps need a range of skills and knowledge to do their job and the U-train map (Stock no. 2730 from the Online Catalogue) shows you the training routes available to develop those skills and knowledge.
- **Your Regional Education programme:** every region publishes an education programme each year giving details, dates and venues of training offered across the region. To find out what is available in your region, request a copy of this from your regional education officer.
Phone UNISONdirect , Tel: 0800 0 857 857, for their contact details.
- **National Programme:** some activist courses are organised from UNISON Centre and details of these courses can be downloaded from <https://learning.unison.org.uk/national-courses/>
- **On Line Courses:** our e-learning site hosts a number of online learning modules ('e-notes') for UNISON members. They are free to UNISON members and activists. Details can be found at <https://e-learning.unison.org.uk>

Running courses in your branch

It is often possible to run UNISON courses and workshops in your branch. Contact your Regional Organiser or Regional Education Officer to find out how the region can assist you in organising a branch-based course or workshop.

Learning and Organising Workshops

A range of short workshops has been developed for delivery in branches to help with organising and engaging members. They vary in length from one hour to half a day and cover a wide range of topics including organising recruitment and campaigning; service group issues; legal, privatisation and transfers; general skills development; member development learning; political education; and women's history and campaigning.



Visit <https://www.unison.org.uk/get-involved/learning-development/activists/branch-development/> for a summary of each of the workshops. If you would like to run any of these in your branch, speak to your regional education officer or organiser.

Discussion leaders training and lay tutor training is also available to help you or other branch reps or officers develop confidence in delivering these short workshops - contact your regional education officer for more information.

Activists – Time Off for Training



Stewards, health and safety reps, union learning reps and branch officers have a right to paid time off for training in their union duties in most workplaces. This also applies to part-time activists and those who take part in online courses.

It is best to advise members to give several weeks notice to employers and to provide managers with information about the course as required. If you or activists in your branch are experiencing difficulties in obtaining time off for union training, contact your region

Learning for Members

UNISON's Free Member Learning Offer

UNISON is offering members free one day “taster” learning workshops as an introduction to UNISON learning. The workshops available are:

- **Your skills, your future:** identifying and developing your skills, increasing confidence and celebrating your successes
- **Facing change together:** practical ways to help and support each other during times of change or uncertainty at work and ways the union can help and advise.
- **Making the most of the Internet:** searching the internet; emails and attachments; staying safe online; using the internet to save money
- **Power To Be You:** improving self-esteem, sharing tips and ideas for addressing confidence and assertiveness issues, raising awareness of UNISON education and development opportunities, and helping participants to speak up with confidence
- **Get That Job:** discussing feelings about applying for jobs, identifying existing levels of confidence in relation to work and personal life, acknowledging strengths and skills, exploring the job application process and application forms, increasing confidence in demonstrating skills and experience on application forms, particularly in relation to the Person Specification



To find out more contact the National Learning and Workforce Development Officers - either Clair Hawkins – c.hawkins@unison.co.uk or Hazel Marsh – h.marsh@unison.co.uk

Membership Development in UNISON

UNISON offers Introduction to study courses, for members only, which are designed for adults to build self-confidence, widen horizons and help progress at work. The courses are free and no exams are involved. Courses on offer are:

- **Return to Learn**
- **Women's Lives**

To find out more about these courses contact Davinder Sandhu,
d.sandhu@unison.co.uk

UNISON's National Bursary Scheme

UNISON learning grants are available to members for financial help with fees or course costs for trade union and labour movement studies and women's studies.

Learning grants are also available for members taking other courses up to degree level.

For each grant members must be personally paying the course fee – full details of the eligibility criteria is on the website (link below)

Learning discounts for UNISON members

Members can also get some fee discounts for distance learning.

For more information on the Bursary Scheme and learning discounts, visit
<https://www.unison.org.uk/get-involved/learning-development/financial-support/>

Model forms

You may like to copy the forms on the next few pages to help with planning and also maintaining training records in your branch.

Planning and Running a Branch Education Event

CHECKLIST

1. What is the need?

- Who is it for?
- Why is it needed?
- What do we want to achieve?

2. Timing

- When will it be held?
- How long will the event / course last?
- What will your start and finish times be?

3. Venue

- What venue will you use?
- Is the venue accessible?
- How many rooms will you need and what size?
- How will the rooms be laid out? What furniture will there be?
- What equipment is needed by you and the tutors - flip charts, laptop & projector, IT, Wi-Fi
- Are the heating, lighting and ventilation adequate?
- What arrangements will you make for refreshments and meals?
- How much will it cost?

4. Who will lead the event / course?

- Someone from within the branch?
- A lay tutor?
- A member of UNISON staff?
- Other? Will there be any costs involved?

5. What materials will you use?

- Are materials available on your subject or will they have to be devised?
- UNISON Education and Training materials
- Other UNISON materials - leaflets, guidance.
- Are the materials needed in any other format, e.g. large print, Braille?
- What other materials might you need?
 - ⇒ paper and pens for participants
 - ⇒ flip chart pens/white board markers (the venue may provide these but check)
 - ⇒ Blu tack
 - ⇒ Name badges
 - ⇒ Cards for name plates

6. How will you recruit for the event / course?

- What is your target group?
- When will you start recruiting?
- Which method will be most appropriate?
 - ⇒ circular
 - ⇒ notice boards
 - ⇒ leaflets
 - ⇒ personal contact
 - ⇒ branch newsletter
 - ⇒ e-mail shot
 - ⇒ social media
- How will you ensure fair representation on events / courses?

7. Access Requirements

- Are there any access/facilitation requirements? e.g. signers, speech to text
- How will these be met?

8. Childcare/Dependent Care

- Who will provide childcare?
- Do members know what childcare/dependent care expenses will be paid?

9. What do you need to agree with management and When?

- Time off?
- Other facilities?

10. Dates and Deadlines

- Course announcement / starting recruitment
- Closing date for applications
- Arranging and briefing tutors
- Booking the venue
- Getting agreement with management
- Ordering course materials
- Organising equipment
- Organising childcare
- Organising facilitation/access
- Confirming arrangements with everyone involved
- Sending out pre-course information including a good map and directions if participants may not know the venue
- Refreshments and meals arranged

11. On the day

- Arrive early
- Check rooms and layout
- Check all the equipment is there – especially that the IT works!!
- Check domestic arrangements - emergency procedures, toilets, refreshments, meals. It's a good idea to have water available for the tutors and participants throughout the day.
- Check that you have all the materials you need including, flip chart pens/white board markers, paper and pens, blu-tack, name badges and cards for name plates
- Have appraisal and expenses forms ready

12. After the course

- Settle any payments due
- Thanks any speakers / facilitators
- Assess the value of the course and whether there is a need to follow it up
- Update branch trade union education records
- Report to branch committee

LEARNING NEEDS QUESTIONNAIRE

Dear colleague –
(Use this space to explain where the survey has come from, i.e. UNISON working with the employer)
Please complete as much or as little as you would like to.

Please complete if you would like to be kept informed of future Unison learning opportunities

Name	Workplace
Telephone	Email

Are you interested in learning something new?

Yes ☐ No ☐ Maybe ☐

Would you like to:

Increase your confidence <input type="checkbox"/>	Gain promotion <input type="checkbox"/>
Develop your career <input type="checkbox"/>	Achieve a qualification <input type="checkbox"/>
Learn for enjoyment <input type="checkbox"/>	Help your children/grandchildren with school homework <input type="checkbox"/>

Other (please specify below)

Are you studying or learning at the moment?

Yes ☐ No ☐

If yes, please tell us what:

How confident are you with your use of everyday maths (numeracy) skills?

Very Confident <input type="checkbox"/>	Fairly Confident <input type="checkbox"/>	A bit unsure <input type="checkbox"/>	Not confident <input type="checkbox"/>
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How confident are you with reading & writing (literacy) skills?

Very Confident <input type="checkbox"/>	Fairly Confident <input type="checkbox"/>	A bit unsure <input type="checkbox"/>	Not confident <input type="checkbox"/>
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How confident are you with your use of computing skills?

Very Confident <input type="checkbox"/>	Fairly Confident <input type="checkbox"/>	A bit unsure <input type="checkbox"/>	Not confident <input type="checkbox"/>
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Would you like to improve any of these skills? Please tick all that apply

Reading skills	<input type="checkbox"/>	Communication skills	<input type="checkbox"/>
Writing skills	<input type="checkbox"/>	Computer skills	<input type="checkbox"/>
Maths skills	<input type="checkbox"/>	Identifying personal Skills	<input type="checkbox"/>
Report Writing	<input type="checkbox"/>	English for Speaker of other Languages	<input type="checkbox"/>

Other:

Are you interested in any personal development courses such as?

Digital photography ☐ British Sign language ☐ Introductory DIY ☐

Cookery ☐ Creative writing ☐ Painting and Drawing ☐

Other:

Is there any other course you would be interested in studying either related to work or professional development?

How do you prefer to learn?

Online	<input type="checkbox"/>	Distance (e.g. Open University)	<input type="checkbox"/>
Within workplace	<input type="checkbox"/>	Informally with other people	<input type="checkbox"/>

Other:

Is English your first language?

Yes ☐ No ☐ If not, what is your first language _____

Please return your completed survey to: (email)

Data Protection Declaration:

As we are collecting personal information about you, we need to check that you understand what this data will be used for and that you are happy with that. Learner information is collected by UNISON in order to target learning opportunities and needs. The information will not be used for any other purpose and will not be used by a third party.

I _____ (print name) Give consent for my information to be used by the branch to target my learning opportunities and needs

Signed _____ Date: _____

EXAMPLE LEARNING NEEDS QUESTIONNAIRE (2)



Wolverhampton General Branch

LEARNING NEEDS QUESTIONNAIRE

Name:

Job Title:

Workplace/Department:

How can I Contact You?

Are you a member?

Or would you like to join?

Working hours per week:

☐ up to 8 hours

☐ 8-16 hours

☐ 16-30 hours

☐ 32 + hours

Do your work hours/patterns change?

☐ yes

☐ no

Why would you personally want to learn?

☐

Promotion

☐

to

increase confidence

☐

qualifications

☐

develop new skills

☐

enjoyment

☐

personal development

☐

to help children

☐

other (please specify):

Are you studying/learning at the moment i.e. college, evening class, open learning or training courses?

☐ yes

☐ no

If yes, what are you studying?

What, if any of these, would prevent you from learning?

- | | | |
|---|---|---|
| <input type="checkbox"/> commitments | <input type="checkbox"/> travel/location | <input type="checkbox"/> childcare |
| <input type="checkbox"/> age | <input type="checkbox"/> time | |
| <input type="checkbox"/> | <input type="checkbox"/> shift patterns | <input type="checkbox"/> not relevant to me |
| <input type="checkbox"/> confidence | <input type="checkbox"/> fear of exams | <input type="checkbox"/> lack of |
| <input type="checkbox"/> (please specify) _____ | <input type="checkbox"/> lack of interest | <input type="checkbox"/> other |

Tell us what courses are you interested in?

*For example: **computer skills** (basic/intermediate/advanced skills), **Skills for life** (e.g. literacy, numeracy), **Personal development** (e.g. writing a CV, interview skills); **Business/vocational courses** (e.g. Customer care, NVQ's)*

If you wanted to learn something new, which study method would you prefer to use? *For example: books/written material, audio, computer based packages, self study, group work, using the Internet, video, classroom environment, other (please state)*

When would you be able to study? (time, day of the week)

- | | | | |
|---------------------------------|----------------------------------|----------------------------------|--------------------------------|
| <input type="checkbox"/> 8-10am | <input type="checkbox"/> 10-12am | <input type="checkbox"/> 12-2pm | <input type="checkbox"/> 2-4pm |
| <input type="checkbox"/> 6-8pm | <input type="checkbox"/> 8-10pm | <input type="checkbox"/> 10-12pm | <input type="checkbox"/> other |
- Day (s) of the week _____

All completed questionnaires will be put into a draw for a £50 cash prize. We look forward to receiving all of your replies.

Thank you for completing this questionnaire. If you have any further comments you want to add please attach them to this document.

Please return your questionnaire to: _____

This questionnaire is part of the ongoing lifelong learning work supported by Branch. It is focused on UNISON members but non-members are welcome where there are places available on courses. They will of course, be strongly encouraged to join UNISON.

Enquiries: Please contactin the first instance via UNISON Branch Office in Wolverhampton .

Data Protection Declaration:

As we are collecting personal information about you, we need to check that you understand what this data will be used for and that you are happy with that. Learner information is collected by UNISON in order to target learning opportunities and needs. The information will not be used for any other purpose and will not be used by a third party.

I _____ (print name) Give consent for my information to be used by the branch to target my learning opportunities and needs

Signed _____ Date: _____

Branch: Activist Training Record Form

[illegible]

UNISON Course Attendance certificate

To be completed by the participant on the final course day and signed by the tutor

Name

UNISON Branch

I am employed by

I have attended the course

.....

Dates

Venue

Tutor's name

I can confirm that this student has attended all sessions of the above course.

Tutor's signature

Date

Students please note you may need this certificate to claim expenses and you will need it to copy to your branch education co-ordinator to maintain the record of your training history

Learning&organising

