

# Union Learning Fund Northern Ireland Prospectus 2017-2020



## **Forward**

### **The Union Learning Fund for Northern Ireland 2017 -2020**

Raising the skills level of the workforce in a key priority of the Northern Ireland Executive skills agenda and the support and endeavour of the Trade Unions has a key part to play in achieving this goal.

Union-led learning is a tremendous success story. It has helped many people to transform their lives, and has opened up new opportunities through access to learning and developing new skills to aid progression within the workplace and to succeed at everyday life.

The Irish Congress of Trade Unions plays a pivotal role in this by working in conjunction with the Department for the Economy to make Union Learning Fund and all other aspects of Union –lead learning a success. We will continue to work to strengthen and expand on the good work of the previous ULF projects in order to make the new 2017-2020 projects even more effective.

We therefore look forward to receiving bids from a wide range of Unions and to working with them to build on the many achievements of the Union Learning Fund to date.

## What are the funds aims?

The Union Learning Fund (ULF) for Northern Ireland was established in 2002 to promote activity by trade unions in support of the Government's objective of creating a learning society.

The ULF recognises the key role that trade unions can play in engaging individuals or groups of people who have been disadvantaged or excluded from education. The trade unions, through the ULF projects, have long been in an ideal position to assist and encourage a wide range of learning. The focus of this learning ensures that employees develop the skills needed to carry out their work to the best of their ability, thereby opening opportunities for them to progress within their workplace and succeed in everyday life.

The Department for the Economy further recognises the role and importance of learning within the workplace. The trade union movement has a key role to play in helping the Government meet the targets it has set for improving the skills levels of the NI population; through their Skills Strategy for Northern Ireland '**Success through Skills – Transforming Futures**' which provides an overarching framework for the development of skills in Northern Ireland.

### ***The Union Learning Fund has 3 main aims: -***

- ◆ To develop and expand the capacity of the trade union movement as a primary catalyst for increased lifelong learning by its members.
- ◆ To increase workplace learning by encouraging innovative, union-led partnership projects which lead to workers gaining nationally recognised qualifications.
- ◆ To widen participation and break down barriers to learning in the workplace by supporting projects which focus on social inclusion and engaging non-traditional learners.

The first aim will be met primarily through a Northern Ireland specific programme of training for accredited Union Learning Representatives (ULRs) and others with a role to play in furthering the aims of the Fund. The Irish Congress of Trade Unions (ICTU) will manage this aspect of the programme on behalf of the Department. The cost of training Union Learning Representatives should therefore **NOT** be included in the project budget.

The second and third aim will be pursued through projects that address one or more of the following **key themes**:

1. Overcoming barriers and widening access to learning in the workplace for those who may have limited access to mainstream education and training provision or to information and advice about learning opportunities.
2. Engaging learners in Essential Skills ICT / Numeracy / Literacy and other learning opportunities.
3. Attracting non-traditional learners, particularly excluded groups of employees such as part-time workers, shift workers, unemployed and those with Essential Skills needs.
4. Promoting partnerships and involvement with employers and others.

## **Who can apply?**

The Fund is open to bids from any trade union with membership in Northern Ireland, whether or not it is affiliated to the Irish Congress of Trade Unions (ICTU).

The Fund seeks to encourage a partnership-based approach to workplace learning. Applications will be particularly welcomed from Trade Unions working in partnership with others, such as employers, education and training providers, Local Authorities, voluntary and/ or community-based organisations.

The Department for the Economy expects that the trade union making the bid will take the lead role in managing and delivering the project, including accounting and financial monitoring arrangements.

Support is available from NIC-ICTU for any union wanting to make an application to the fund. Applicant organisations are strongly advised to indicate early expressions of interest to ICTU, unions should contact:

Julie Gorman

Irish Congress of Trade Unions

Carlin House

4-6 Donegall Street Place

Belfast

BT1 2FN

[julie.gorman@ictuni.org](mailto:julie.gorman@ictuni.org)

Tel: 02890 247940

## **What can be funded and for how long?**

**The lifespan of the project will be three years; however, this is subject to continued funding.**

All funding will be paid in arrears on a quarterly basis.

Although there is no cap on the amount of money that can be applied for, however applicants should understand that there is a limited amount of money available in the fund and should submit bids which are realistically costed. Unions are reminded that value for money will play a key part in the financial evaluation of projects. All applications will need to demonstrate value for money in all areas of expenditure.

Projects should start on 1<sup>st</sup> April 2017 and will need to be completed by 31<sup>st</sup> March 2020. Projects must ensure that they achieve the maximum impact in the time available. Consideration must be given to the time required to actively engage and recruit employers and individuals, allowing time for the delivery and closure of the project in a way that promotes continuation of the learning following closure.

The Department for the Economy and ICTU will consider project proposals that meet the aims set out above. Projects should form part of a wider union strategy for learning that develops new approaches to learning in the workplace and/or promotes best practice.

Projects should encourage investment from unions, employers and employees in order to maximise the use of ULF funding and create sustainable learning modalities for delivery when projects come to an end.

## **Examples of activity that ULF may support**

Cost of learning provision such as the development of new courses, buying in learning provision and the travel costs of learners. The Fund is not intended to support the acquisition of equipment or accommodation which the Department would expect to be provided by the project partners. Exceptionally, a limited sum of not more than 10% of the project cost may be allowed.

Other costs may include:

- Salaries of project staff and associated costs – there is no commitment to fund these costs beyond the project period.
- Marketing, publicity and dissemination.
- Guidance and support for learners.
- Developing effective frameworks for workforce development within an organisation or sector in partnership with employers and other appropriate bodies.

## **Ineligible costs**

- Staff costs that are not directly attributable to project delivery: staff training; maternity, paternity or adoption; sick pay; childcare; redundancy payments; and payments for unfunded pensions.
- Other ineligible Costs – Volunteer costs, gifts.

## **How will the money be allocated?**

The Department for the Economy will be the final decision on the allocation of the Fund resources with advice from a small Assessment Panel drawn from representatives of the trade union movement and other relevant organisations.

Applications will be considered and assessed by the panel against the criteria in this prospectus.

## **Responsibilities of applicants**

Applications must show that projects can be successfully completed within the timeframes listed above. It is the responsibility of applicants to ensure the terms, conditions and responsibilities related to ULF funding are fully understood prior to signing the grant agreement.

ICTU will regularly conduct financial monitoring and reviews with the projects, to ensure financial probity, delivery is on track and activity complies with the programme requirements.

All ULF projects are expected to identify and respond to demands for learning. If a Learning Needs Analysis has already been carried out, then it must be submitted with the application as evidence of need.

Budget forecasts must be detailed and as accurate as possible.

## **Support**

Advice and support will be available from the Irish congress of Trade Unions, Union Learn department throughout the duration of the project.

## **What criteria will be used in assessing applications?**

When drafting bids, applicants should not assume that the ULF Assessment Panel has any prior knowledge of their sector, business or any learning activity carried out by Trade Unions.

**Each application will be assessed against the criteria set out below.**

### **1. Evidence of need and focus (Question 1 & 2)**

Applications must clearly describe the purpose of and need for the project, including how the project will contribute towards the aims and key themes of the Fund.

The application should explain how the project will add value to and not duplicate any existing provision.

Applications must show the evidence that has been used as the basis for the project bid. This should include a profile of learning and skills needs of project target groups, surveys of employees and employers, learning needs assessments, the vulnerability of employment within target groups and other research such as that undertaken by academics or Government.

Information should be provided about recent ULF projects that have or are currently being delivered through your Union, with an explanation as to why further funding is needed.

### **2. Linkages (Question 3)**

Improving the levels of literacy, numeracy and ICT skills of the NI population has been a priority for the Northern Ireland Executive since the Essential Skills strategy was introduced in 2004. The application must describe how will the project significantly improve essential skills level of employed workers.

The application should clearly set out how the activity aligns with the Skills Strategy for Northern Ireland, **'Success through Skills – Transforming Futures'**. The key aim of this Strategy is to enable people to access and progress up the skills ladder, in order to raise the skills level of the whole workforce, raise productivity and secure Northern Ireland's future in a global marketplace.

Does the project provide opportunities for employees to develop their skills and progress to further learning? Does your proposal identify target areas of social inclusion?

<https://www.economy-ni.gov.uk/sites/default/files/publications/economy/Success-through-Skills-Transforming-Futures.pdf>

### **3. Widening participation and breaking down barriers to learning. (Question 4)**

The Further Education Strategy for Northern Ireland, **'Further Education means Success'**, outlines the benefits of Further Education at an individual, economic and societal level. Widening participation in education and training is an essential factor in promoting social inclusion, combating poverty, and helping people from disadvantaged backgrounds to become engaged with society in general. It is also a vital means of supporting the achievement of economic goals.

<https://www.economy-ni.gov.uk/sites/default/files/publications/economy/FE-Strategy%20-FE-Means-success.pdf>

Will the project widen participation in learning, e.g. by a focus on particularly hard to attract groups such as unskilled and semi-skilled workers, shift workers, older employees, those with Essential Skills needs or who have had a previous, unsatisfactory learning experience?

This should focus on equality of opportunity, social inclusion, vulnerable, atypical workers, migrant workers and non-traditional learners. The ULF gives priority to projects that widen access to lifelong learning for people in Northern Ireland, irrespective of their background or current personal circumstances.

### **4. Union Strategy (Question 5)**

The Union Learning Fund should complement existing union strategies on lifelong learning and employer engagement.

Applications must clearly describe how the project will complement the unions approach to learning and skills and how it will link to the union's wider strategy. This must include an explanation of how the project will engage with employers. This could mean the establishment of new structures such as workplace learning committee.

Details must be provided of established working groups, employer partnerships, steering groups or other bodies that have concluded the need exists and who endorse the proposal.

### **5. Valid objectives with clear measurable targets and outcomes. (Question 6, 7 & 8)**

Applications must describe the link between the aims and objectives of your proposed project, the specific activities planned and the achievement of targets.

Detail of how each of these will be delivered, managed and monitored to ensure all activity will be completed within the approved timescales must be included. Applications should show how learning outcomes have, or will be identified.

SMART (Specific, Measurable, Achievable, Realistic and Time bound) criteria must be used when describing the aims and objectives.



In this bidding round, there will be an emphasis on the actual 'learning' activity. Projects must be able to evidence the impact that their learning activity has had on the individual, along with the methods used to gather this evidence.

Applicants are asked to outline the types of learning, levels of learning and the numbers of workers to benefit from the Union Learning Fund. In considering value for money, projects will be judged on learning outcomes. Projects must demonstrate how the learning outcomes will be achieved and ensure the targets are realistic and attainable.

Projects should focus on addressing Essential Skills and learning that supports economic growth and improved activity.

#### **6. Promoting Partnership (Question 9)**

Does it demonstrate effective partnership, for example with employers, other trade unions, learning providers and organisations, community based organisations in an effort to maximise the number and quality of education and training opportunities available?

#### **7. Sustainability (Question 10)**

Does the proposal demonstrate the potential to create and support a learning culture beyond the project period? Applications must indicate how Trade Union policies, systems, working practices and future resource planning (including staffing) will evolve to help sustain learning activities and services.

#### **8. Project Planning and Management (Question 11 & 12)**

Is the project timetable detailed and realistic? Does it contain key milestones such as appointment of project staff, setting up of steering groups, completion of Learning Needs Analyses, launch date and course dates?

Forecasting outcomes provides the basis for planning your project and measuring its progress against objectives and targets. Forecasting outcomes should also be related to forecasting the spending profile of the project. Does the project demonstrate effective mechanisms for project management?

Applications must show how the project will be managed and how outcomes are going to be achieved. This might include reference to the role of steering groups, project managers and project workers.

## **9. Monitoring and Evaluation Arrangements (Question 13)**

There will be an emphasis on the monitoring and evaluation of the activity delivered by the ULF project at an individual level. The Department for the Economy will expect the impact of the project to be clearly visible, for example, if you are holding awareness raising events, you will be expected to record how many people attended and what the benefit was for them, including any progression on to further project funded activity. The project must have robust activity monitoring systems to effectively manage and report on this information.

Applicants must provide clear evidence of how they will record and track learner progression.

The application should clearly describe the structure and management of the project, and in particular, explain what procedures are in place for monitoring the progress of the project and recording project outcomes.

Where the new application is requesting a continuation of a previous project or activity, the performance and delivery of that project will be taken into account as part of the appraisal process.

## **10. Project Finance (Question 14)**

The ability to deliver cost effective outcomes will be a major consideration for the Assessment Panel in deciding which applications are successful. In all cases, applicants must justify all financial outlay in the appropriate section of the application form. Ensuring value for money will be important criteria in deciding the merits of each application.

Applications which demonstrate funding from their own trade union to cover costs such as, travel and subsistence, marketing or administration will be viewed favourably.

Evidence that unions have made every effort possible to keep costs down will be looked on favourably by the panel.

## **The application process**

All applications must be completed on the ULF application form and signed by an appropriate senior official of the organisation.

Only applications submitted on the ULF Application Form will be accepted. Additional sheets can be used and should be clearly marked with the unions name and project title.

The application form must be accompanied by a letter signed by the unions nominated officer to confirm that the application has the support of the union leadership.

ICTU Union Learn team can provide advice and support to all Trade Unions considering applying for a grant from the Union Learning Fund. In submitting a ULF application, you thereby agree that details of your application and delivery of the project can be shared with the ICTU. You also agree that your application can be shared with members of the ULF Assessment Panel in order to consider its alignment with the criteria outlined in this prospectus.

## **What are the deadlines?**

**The application and supporting letter must be submitted by 12pm on Tuesday 7<sup>th</sup> March 2017**

Subject to funding, approved projects should start on 1<sup>st</sup> April 2017 and must be completed by 31<sup>st</sup> March 2020

Completed application should be posted to:

Julie Gorman

Irish Congress of Trade Unions  
45-47 Donegall Street  
Belfast  
BT1 2FG

**PLEASE ALSO E-MAIL AN ELECTRONIC COPY OF THE APPLICATION TO: [julie.gorman@ictuni.org](mailto:julie.gorman@ictuni.org)**

## **What happens next?**

The ULF Assessment Panel will meet to discuss and assess the project applications during week commencing 6<sup>th</sup> March 2017.

Formal agreement letters will be issued to the successful applicants.

The decision on funding applications is final and no appeals process will be available.

The ULF Assessment Panel will score each application against the above criteria.

The weightings are as follows:

<b>Criteria</b>	<b>Weighting</b>
<b>1. Evidence of need and focus</b>	<b>20</b>
<b>2. Linkages</b>	<b>15</b>
<b>3. Widening participation and breaking down barriers to learning.</b>	<b>20</b>
<b>4. Union Strategy</b>	<b>5</b>
<b>5. Valid objectives with clear measurable targets and outcomes</b>	<b>15</b>
<b>6. Promoting Partnership</b>	<b>5</b>
<b>7. Sustainability</b>	<b>5</b>
<b>8. Project Planning and Management</b>	<b>10</b>
<b>9. Monitoring and Evaluation Arrangements</b>	<b>10</b>
<b>10. Project Finance &amp; Participant Investment</b>	<b>10</b>