



Union Learning Fund Northern Ireland Prospectus 2020 - 2023



Forward

The Union Learning Fund for Northern Ireland 2020 -2023

Raising the skills level of the workforce is 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 in everyday life.

The Irish Congress of Trade Unions plays a pivotal role in this by working in conjunction with the Department for the Economy (DfE) to make Union Learning Fund and all other aspects of Union-led 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 2020 - 2023 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.

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 NIC-ICTU.

Trade Unions should contact:

Julie Gorman

Irish Congress of Trade Unions

Carlin House

4-6 Donegall Street Place

Belfast

BT1 2FN

julie.gorman@ictuni.org

Tel: 02890 247940

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 develop a successful career.

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.

The Union Learning Fund has 4 main aims: -

- ◆ **To develop and expand the capacity of the trade union movement through union-led learning.**
- ◆ **To increase workplace learning by encouraging innovative, union-led partnership projects which lead to workers gaining nationally recognised qualifications.**
- ◆ **To address Essential Skills and learning that supports economic growth and improved activity.**
- ◆ **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.

All aims 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, delivering key priority skills and qualifications that meet the needs of both the employer and the employee/learner.

What can be funded and for how long?

For the purpose of succession planning, the project plan will be three years. However, budgets will be approved and awarded on an annual basis and will remain subject to ongoing financial pressures at departmental and government level.

All funding will be paid in arrears on a quarterly basis providing the expenditure forms part of the approved project and there is evidence that the cost has been incurred and paid.

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. Given these limitations, it may not be possible to grant all of the projects all of the funding that they have requested, such decisions will be subject to review and decision between NIC-ICTU and DfE officials with management responsibility for the ULF

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.

Projects must demonstrate investment from unions and/or employers in order to maximise the use of ULF funding and create sustainable learning modals for delivery when projects come to an end.

Examples of activity that ULF may support.

Examples of activities eligible for ULF funding include:

- Supporting the cost of learning provision such as purchasing learning provision to improve the employability of individuals and to further their progression within the workplace; where these costs are not covered through other publicly funded provision.
- Salaries of project staff and associated costs for the duration of the contract, providing these are reasonable and align with staff undertaking a similar role within the organisation.
- Marketing, publicity and dissemination linked to the promotion of learning, where marketing and publicity is promoting the ULF project or the learning. All marketing and publicity materials must be considered for long term use and not short term or single use.

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.

Ineligible costs

- Staff costs that are not directly attributable to project delivery: staff training; 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 have 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.

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 outlined in the application. 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. Projects must adhere to reporting processes as continued funding is subject to annual outcomes.

All ULF projects are expected to identify and respond to demands for learning. A Learning Needs Analysis should be submitted as supporting evidence of need or reference to research that has been carried out by the applicant.

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. Project Summary & Evidence of Need (Question 1 & 2)

Applications must clearly describe the purpose of and need for the project. The project summary must address the following questions:

- What is the projects aim?
- What will be delivered?
- How will it be delivered?
- What will be the overall impact?

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.

2. Linkages (Question 3)

The application should clearly set out how the activity aligns with the aims of the Union Learning Fund. How will the proposal significantly improve the essential skills level of employed workers? Does your proposal identify target areas of social inclusion? Does the project provide opportunities for employees to develop their skills and progress to further learning?

3. Widening Participation, Access and Equality of Opportunity (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.

If applicable, 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.

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. Measurable Targets (Question 6)

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

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. Project Management (Question 7)

The application must outline the activity that will be undertaken by the Project Manager, in order to ensure all targets specified in the application will be met.

7. Partnership Working (Question 8)

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.

8. Monitoring and Evaluation (Question 9)

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.

9. Project Finance & Participant Investment (Question 10)

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

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

Approved Budget Headings include:

- Salaries
- Travel & Subsistence
- Publicity & Promotion
- Learning Fund
- Learning Events
- Communications (Mobile phone)

10. 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.

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 Thursday 30th January 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

What happens next?

The ULF Assessment Panel will meet to discuss and assess the project applications during week commencing the 10th February 2020.

Subject to funding, approved projects must start on 1st April 2020

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:

| Criteria | Weighting |
|--|------------------|
| 1. Project Summary & Evidence of Need | 20 |
| 2. Linkages | 10 |
| 3. Widening Participation, Access and Equality of Opportunity | 10 |
| 4. Union Strategy | 5 |
| 5. Measurable Targets | 15 |
| 6. Project Management | 5 |
| 7. Partnership Working | 5 |
| 8. Monitoring and Evaluation | 5 |
| 9. Project Finance & Participant Investment | 20 |
| 10. Sustainability | 5 |
| TOTAL | 100 |