

Union Learning Fund

Northern Ireland

2023 - 2026

Prospectus



The Union Learning Fund for Northern Ireland 2023-2026

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 Fund is managed and administered by the Northern Ireland Committee of the Irish Congress of Trade Unions (NIC ICTU) under an agreement with the Department for the Economy (DfE).

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, through their [Skills Strategy for Northern Ireland: Skills for a 10x Economy](#).

The Union Learning Fund has 6 main aims: -

1. To develop and expand the capacity of the trade union movement through union-led learning.
2. To increase workplace learning by encouraging innovative, union-led partnership projects which lead to workers gaining nationally recognised qualifications.
3. To raise the skills of the workforce by addressing essential skills needs and learning that support economic growth and improved activity.
4. To increase participation in lifelong learning in the workplace by supporting projects which focus on the Continued Professional Development of workers.

5. 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.
6. To be responsive to emerging skills and employability needs of workers, helping to deliver the skills needs of both the current and future workforce.

The first aim will be met primarily through a Northern Ireland specific programme of accredited training for Union Learning Representatives (ULRs) and others with a role to play in furthering the aims of the Fund. NIC 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:

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

Who can apply?

The Fund is open to bids from any trade union with membership in Northern Ireland, whether it is affiliated or not, 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 the trade union making the bid to 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

Julie.Gorman@ictuni.net

Tel: 02890 247940

What can be funded and for how long?

The life span of each project will be three years. However, funding will be assessed and approved on an annual basis and will be dependent on continued funding allowance from the Department for the Economy.

All funding will be paid in arrears quarterly, as long as the expenditure forms part of the approved project and there is evidence that the cost has been incurred and paid.

Applicants should be aware that there is a limited amount of money available in the fund and submit realistically costed bids. Unions are reminded that value for money will play a key part in the financial evaluation of projects. Projects must demonstrate investment from unions and/or employers to maximise the use of ULF funding and create sustainable learning modalities.

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 the continuation of the learning following closure.

Approved Project Costs and Activity

1. Learning Fund

All projects should focus on Essential Skills and/or upskilling qualifications and learning that will enable in-work progression.

The primary focus of ULF should be aimed at level 3 and below. However, the ULF can support courses delivered at level 4/5 where appropriate and where it supports employability and progression.

The learning fund must only support the cost of purchasing and delivering qualifications, that are not covered through other publicly funded provisions.

Projects must seek to deliver courses through FE colleges (which are a DfE Non-Departmental Public Body) in the first instance. Training providers should only be used if colleges cannot facilitate training. The Department will monitor the balance between college and training organisation delivery.

2. Project Staffing and Salaries

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.

Full-time staff employed on the project should only engage in activities directly related to the delivery of the project. The trade union is responsible for arranging the Project Manager/Worker's appointment before the funding commencement date. Unions will be required to provide cover if the project manager/worker leaves or has any long-term absence during the project duration. If this is not possible the union must inform NIC ICTU. This will ensure the work of the project will continue, with targets continuing to be met.

3. Promoting the Project

Unions are encouraged to be innovative in developing and delivering promotional activity. This could involve the use of social media, existing websites, case studies, e-newsletters or utilising existing union newsletters. Unions should, where appropriate acknowledge the ULF NI as the funder of learning activity.

All costs relating to marketing, publicity, and dissemination must be linked directly to learning opportunities available through the ULF project.

All marketing and publicity materials must be considered for long term use and not short term or single use.

4. Staff Related Costs: Travel & Subsistence and Communication

Staff travel, subsistence and mobile phone costs must be directly related to the effective delivery of the project. Certified travel claims forms with third-party invoices and receipts must be retained, scanned, and submitted electronically with the financial quarterly reports.

Ineligible costs

- The Fund is not intended to support the acquisition of equipment or accommodation that the Department would expect to be provided by the project partners.
- 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.
- Informal learning/non-accredited learning costs.
- Other ineligible costs – Volunteer costs, gifts.

Responsibilities of applicants

Applications must show that projects can be completed within the time frames outlined in the application. It is the responsibility of applicants to ensure the terms and responsibilities outlined in this prospectus are fully adhered to.

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.

Guidance and Criteria related to the Application Form

The following guidance will aid in the completion of each section of the application form. Unions must be precise and succinct in their submissions.

Assessment Panel

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 in Northern Ireland.

As funding is finite, the criteria will be applied rigorously by the Assessment Panel in assessing the bids and in the allocation of funding. The ability to deliver cost effective outcomes will be a major consideration for the Panel.

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

The Assessment Panel will score each question answered in the application using the following weighting:

Questions:	Weighting
1. Past Performance	10
2. Your Project	15
3. Evidence of Need	15
4. Union Strategy	10
5. Linkages	10
6. Project Management	5
7. Partnerships	5
8. Project Monitoring	5
9. Targets	15
10. Project Finance	15
TOTAL	105

1. Past Performance

Past performance will be a major consideration in deciding whether to award continued funding. Unions with existing projects must provide details of how they achieved the outcomes and targets in their last funding application. Where they were unable to do so, applicants must clearly explain the reasons for this.

Unions should consider past performance when setting targets and budgets in their new bid.

If this is the union's first bid to the ULF NI, please use this section of the application to outline work previously undertaken to develop and deliver similar activity. Please provide evidence to support the union's ability to achieve the targets set in the application.

2. Your Project

The project summary must address the following questions:

A. What is the overall aim/s of the project?

Applications must clearly describe the purpose and overall aim/s of the project. Activity can be in a single or group of workplaces, in a sector, or with a particular geographical focus. Activity that engages with new workers/learners, new workplaces and/or new employers will be particularly welcome and looked on favorably.

Remember, aims are statements of intent. They are usually written in broad terms. They set out what you hope to achieve at the end of the project.

B. Project Objectives: What and how will they be delivered?

Applications must clearly describe the project goals and what activity will be undertaken to deliver them.

Use clear SMART (Specific, Measurable, Achievable, Realistic and Time-bound) criteria wherever possible when describing the project objectives.

Remember, the project objectives should describe a series of tasks and activities that, if completed, enable the project to achieve its aim/s.

C. What will be the overall impact?

Applications must describe the difference the project will make in terms of where the union is now in relation to union learning and workforce development and where it will be at the end of each financial year.

3. Evidence of Need / Research

Applications must show the evidence used as the basis for the project bid. This could include a profile of the learning and skills needs of the project target groups, surveys of employees and employers, learning needs assessments and/or research undertaken by the union or government.

4. Union Strategy: Employer Engagement/Workforce Development

Building strong relationships between unions and employers around skills and learning, supports good industrial relations, improved skills utilisation and fairer access to learning within the workplace. The project should complement existing union strategies on lifelong learning and employer engagement.

Applications must clearly describe how the project will complement the union's approach to learning and skills and how it will link to the union's wider strategy. For example, workplace learning around developing the skills and confidence of excluded or under-represented groups can complement a union's equality agenda.

Applications should describe how projects will introduce or develop formal workplace structures, whereby unions negotiate and consult with employers. This includes developing the skills of ULRs and other workplace reps to engage with employers.

The provision of learning opportunities is an added value in terms of union membership. Plans to increase organising opportunities through union learning should be highlighted within the application.

5. Linkages

The application should set out how the activity aligns with the aims of the Union Learning Fund, which links to the objectives outlined in the DfE skills strategy for Northern Ireland, Skills for a 10x Economy.

Applicants should consider the following questions.

- 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?
- Does the project link with and boost the impact of the Skills for a 10x Economy strategy?

6. Project Management

The role of the Project Manager is to provide the strategic direction in the pursuit of the aims and objectives of the application and to facilitate their achievement through effective management of the project. This includes the financial management of the project and adhering to the reporting requirements of the ULF.

All Project Managers must meet with ICTU on a quarterly basis to review quarterly performance against targets and budget expenditure.

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

7. Partnerships

The application should demonstrate effective partnership working to maximise the number and quality of education and training opportunities available.

This could include partnerships with employers; other trade unions; learning providers; community-based organisations.

Unions must list all project partners and detail their role within the project.

8. Project Monitoring

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 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 onto further project funded activity. The project must have robust activity monitoring systems to effectively manage and report on this information.

Unions 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 explain what procedures are in place for monitoring the progress of the project and recording project outcomes.

9. Targets

Applicants are asked to outline the types of learning, levels of learning and the number of workers to receive help 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.

10. Project Finance

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 trade union and/or employer to cover costs such as travel and subsistence, learning costs, marketing and 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 Assessment Panel.

Approved Budget Headings include:

- Learning Fund
- Salaries
- Travel & Subsistence
- Communication (Mobile)
- Publicity & Promotion

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.

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.

In signing the application unions agree to fulfil their role and responsibilities in the reporting processes outlined in the ULF NI Reporting Guidelines.

NIC ICTU can provide advice and support to all trade unions considering applying for a grant from the ULF.

In submitting the ULF application, you thereby agree that details of your application and delivery of the project can be shared with the NIC ICTU. You also agree that your application can be shared with the Assessment Panel members to consider its alignment with the criteria outlined in this prospectus.

The application and supporting letter must be submitted by 12pm on Monday 20th March 2023.

Subject to funding, on an annual basis, approved projects should start on 1st April 2023 and must be completed by 31st March 2026.

Completed application should be emailed to:

Julie Gorman julie.gorman@ictuni.net

What happens next?

The ULF Assessment Panel will meet to discuss and assess the project applications during the week commencing 20th March 2023.

Formal grant letters will be issued to the successful applicants.

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