Union Learning Representatives in the United Kingdom – Activity, Impact and Organisation

Abstract

The debate over the significance of Union Learning Representatives (ULRs) in the United Kingdom (UK) has become increasingly polarised. Some commentators see little prospect of ULRs contributing to advancing either workplace learning or union organisation due to the constraints of neo-liberal state policy. An opposing view emphasises union agency in developing a collective approach to learning and extended joint regulation through a process of critical engagement. This article presents analysis of data from the 2009 National Survey of ULRs, which finds a positive relationship between ULR activity and its impact in enhancing training outcomes, increasing union membership and the joint regulation of workplace learning. This supports arguments that agency of ULRs is not inevitably suppressed by the structural limitations of union learning.

Keywords: Union learning representatives, training, negotiation

Introduction

The Union Learning Representative (ULR) role in the UK has its origins in the establishment of the Union Learning Fund (ULF) in 1998. ULRs are workplace representatives whose primary role is to assist union members in accessing learning, and, in some cases, to consult and negotiate with the employer over these issues. By 2010/11, more than 26,000 had been trained (Unionlearn, 2011). While not all took up the role, of those that did, a significant proportion had not previously held any union position, triggering an injection of new activists into union branches (Saundry et al., 2010; Bacon and Hoque, 2008).

Given the challenges faced by UK trade unions in retaining members and influence, the emergence and development of the ULR role has been seen as making a vital contribution to the revitalisation of union organisation (Lee and Cassell, 2009; Findlay and Warhurst, 2011; Moore, 2011). However, critics argue that the potential of ULR activity is fundamentally restricted by the incorporation of union learning within the UK's neo-liberal approach to vocational education and training (McIlroy and Croucher, 2009). From this perspective, union learning is reliant on cooperation with the state, which controls access to funding and shapes priorities (Mustchin, 2012), and on the goodwill of employers. Consequently, ULRs are unlikely to have any meaningful impact beyond large workplaces, where trade unions are already strong (Lloyd and Payne, 2006; McIlroy, 2008).

To examine this debate, Rainbird and Stuart (2011) have set out a conceptual framework based on two competing perspectives. The 'incorporation thesis' emphasises the structural

inadequacies of union learning. Here, the role of the ULR is restricted to facilitating learning that serves state and employer interests. ULR activity represents a shift away from the traditional bargaining role of the shop steward and crowds out 'grass-roots organising'. In contrast, the 'critical engagement' thesis stresses the influence of union agency. While this perspective recognises the constraints of operating within a voluntarist and neo-liberal training regime, it argues that ULRs can exploit the 'opportunity structure' opened by union learning to shape the collective character of skills development (Cassell and Lee, 2009), increase union organisational capacity and extend joint regulation (Heyes and Rainbird, 2011; Wallis et al., 2005).

This article examines this debate, and explores the tensions between structure and agency that underpin it, using data from the 2009 National ULR Survey, conducted by Unionlearn and designed by the authors. A series of propositions are developed concerning the extent to which the activities of ULRs, and their impact on training and learning, member recruitment and interest in union membership, are related to: workplace characteristics associated with high levels of organisation; managerial support; collective learning institutions; and the conduct of negotiation over learning.

The article argues that there is clear evidence of a positive relationship between ULR activity and its impact, and the joint regulation of workplace learning. This suggests that agency of ULRs is not inevitably suppressed by the structural limitations of union learning. Moreover, extant critiques of the potential role played by union learning representatives in

strengthening workplace organisation reflect a duality between organising and servicing and organising and partnership that, as Simms and Holgate (2010) have argued in respect of union organising in general, obscures the objectives of union learning, and prevents a clear analysis of the nuanced ways in which ULRs can contribute to union renewal.

The article proceeds as follows: first, research evidence regarding the role played by ULRs is discussed; the methods are then described and the dependent and explanatory variables are specified; results are presented in the form of four regression models that explore measures of ULR activity and impact; finally results are discussed and conclusions are drawn.

Union Learning Representatives – agents of the state?

The role of ULRs is central to debates over the efficacy of union learning. For critics, the evolution of the ULR function, within the wider structure of union learning, fundamentally constrains its contribution to strengthening union organisation. While a statutory right for (reasonable) paid time off for ULRs was introduced under the Employment Relations Act 2002, ULRs operate within a voluntaristic and neo-liberal training regime (Clough, 2010). For McIlroy and Croucher (2013:286), this consigns ULRs to the role of 'foot soldiers in the perennial but recharged project of creating a high-skill, flexible, competitive labour market'.

Consequently, it is argued that ULR activity is subject to managerial discretion and merely acts a 'lubricant' in maximising productivity, with employer support contingent on skills development meeting productive requirements (McIlroy, 2008:286). Furthermore, scarce union resources are diverted from workplace organising to employer-focussed learning activities. In this context, trade unions are seen as 'state agents' (Ewing, 2005) who attenuate the failure of a market-driven system of skills and training. Therefore, union-led workplace learning is 'implausible' as an engine of revitalisation (McIlroy, 2008) and is likely to be confined to workplaces where unions are already strong (Lloyd and Payne, 2006).

This critique reflects a fundamental rejection of the emphasis placed by some unions on partnership working and the provision of individual services to members. Rather than independent activists concerned primarily with collective bargaining, ULRs are integrated into 'management goals' (McIlroy and Croucher, 2009:294) and limited to providing learning advice and courses for members. Therefore, they are incapable of contributing to 'adversarial grass-roots organising' and consequently to union renewal (McIlroy and Croucher, 2009:263).

While the 'critical engagement thesis' acknowledges the structural limitations of union learning, it stresses the potential of union agency; the ability of ULRs to 'critically engage' with the environment in which they find themselves and to create new channels of voice where conventional collective influence is currently stifled (Moore, 2011; Rainbird and Stuart, 2011). Thus, ULRs can develop an agenda independent of employers' interests (Wallis et al., 2005) and recast learning as a collective issue (Cassell and Lee, 2009).

The critical engagement thesis rejects the separation between the bargaining role of the shop steward and the advisory orientation of the ULR. Instead, it suggests that they are critically intertwined in three respects. First, ULR activity stimulates recruitment of new members by demonstrating the relevance of union membership to workers' personal and professional lives (Thompson et al., 2007; Moore and Wood, 2007). Second, the ULR role attracts new activists, who are more likely to come from groups under-represented within trade unions, extending union reach to less organised areas of the workforce (Wallis et al., 2005). Third, it is argued, that the ULR role offers 'an escalator to wider union activity' (Moore, 2011:77).

Assessing the evidence

Evidence from a series of national surveys suggest that ULRs have increased awareness of learning opportunities and extended the provision of training (Hoque and Bacon, 2011; Wood and Moore, 2004). Moreover, an evaluation of the Union Learning Fund (Stuart et al., 2013) found that it had expanded access to learning and closed skills gaps. Importantly, it would seem that the impact of union learning reaches beyond employers' interests, extending basic and transferable skills and enhancing employability (Rainbird, 2005; Thompson et al., 2007).

There is also evidence that ULR activity is not confined to the provision of learning 'services'. The 2009 ULR survey found that almost three-quarters of ULRs had recruited, or helped to

recruit, new members in the previous 12 months (Saundry et al., 2010). While recruitment is not necessarily concomitant with developing organisational capacity, Findlay and Warhurst (2011) found that union learning had a positive impact on union activism. Furthermore, the ULR initiative has drawn a significant number of new activists into trade unions. While nine percent of ULRs in 2000 had no previous union role, this had increased to 37 percent by 2009. The same data found greater ethnic and gender diversity among the ULR community compared to other groups of union activists (Saundry et al., 2010). Nonetheless, there has been concern that 'new activists' are motivated by a narrow interest in learning rather than wider collective concerns (Findlay and Warhust, 2011). Also, early evidence suggested that they may not be integrated into local union structures (Wallis et al., 2005; Rainbird, 2005). However, more recent studies point to a growing acceptance of the ULR role by union branches and ULRs developing wider interests in union issues (Moore, 2011; Stuart et al., 2013).

Critics question this evidence, arguing that it relies on small-scale qualitative studies in highly unionised settings or 'unrepresentative' self-report surveys (McIlroy and Croucher, 2013:6). They place particular emphasis on Hoque and Bacon's (2008) analysis of the WERS2004, which discovered little positive association between ULR presence and training activity. However, scrutiny of the same survey by Stuart and Robinson (2007) found that ULR presence made it more likely that workers in unionised workplaces would receive training.

The most recent WERS data provide comfort for both sides of the debate. In 2011, almost one–third of employees had access to a ULR, and the proportion of workplaces with on-site union representation, which had ULRs, increased to 16 percent, from 10 percent in 2004. There was also a slight increase in the percentage of workplaces where training was negotiated, from 11 to 13 percent. However, ULRs remained concentrated in large, unionised workplaces. There was also a clear divide between the public and private sectors, with public sector workplaces more likely to be 'high trainers' and to negotiate over training (van Wanrooy et al., 2013).

Defining the issues

While writers associated with the 'incorporation thesis' reject claims of structural determinism (McIlroy and Croucher, 2013), the two schools of thought are underpinned by different views as to the potential power of union agency in the context of learning. Although McIlroy and Croucher (2009:297) argue that their rejection of ULRs as 'compelling agents for change' is based on a lack of evidence, their dismissal of the ULR contribution to renewal as implausible reflects a particular conceptualisation of the ULR role, which implies a fundamental dichotomy between unions acting as an 'agent' serving the interests of employers by supplying scarce skills and 'bargaining with management to regulate training and enforce union standards'. This has implications for broader debates over union renewal, juxtaposing as it does adversarial grass-roots organising against partnership and servicing approaches.

This leads to two very different predictions regarding the potential implications of the ULR initiative. The 'critical engagement thesis' suggests that ULR activity and impact in relation to training and extending union organisation will be associated with the development of collective institutions and the joint regulation of training. In contrast, the 'incorporation thesis' predicts that ULR activity and impact will be more likely in workplaces where trade unions are already well organised and, ultimately, will depend on managerial support. Moreover, it implies a clear disjuncture between the ULR role and collective bargaining.

These two perspectives are reflected in three sets of propositions:

Proposition 1: Levels of ULR Activity in Relation to Training and Learning

Incorporation thesis:

Proposition 1a - *Levels of ULR activity in relation to training and learning will be positively associated with workplace size, union density and sector.*

Proposition 1b - *Levels of ULR activity in relation to training and learning will be higher in workplaces with greater managerial support for learning*

Critical engagement thesis:

Proposition 1c - *Levels of ULR activity in relation to training and learning will be greater in workplaces with collective workplace learning institutions.*

Proposition 1d - *Levels of ULR activity in relation to training and learning will be greater in workplaces where there is negotiation over training and learning.*

Proposition 2 - Impact of ULR Activities on Workplace Training

Incorporation thesis:

Proposition 2a – *impact of ULR activities on training and learning will be positively associated with workplace size, union density and being in the public sector.*

Proposition 2b - *impact of ULR activities on training and learning will be greater in workplaces where there is managerial support for learning.*

Critical engagement thesis:

Proposition 2c - *impact of ULR activities on training and learning will be greater in organisations with collective workplace institutions.*

Proposition 2d - *impact of ULR activities on training and learning will be greater in organisations where there is negotiation over training and learning.*

Proposition 3 - Impact of ULR Activities on Recruitment and Interest in Union Membership

Incorporation thesis:

Proposition 3a - r*ecruiting new members and perceived interest in union membership will be positively associated with workplace size, union density and being in the public sector.*

Proposition 3b - *recruiting new members and perceived interest in union membership will be greater in workplaces where there is managerial support for learning*.

Critical engagement thesis

Proposition 3c - *recruiting new members and perceived levels of interest in union membership will be greater in organisations with collective workplace institutions*.

Proposition 3d - *recruiting new members and perceived levels of interest in union membership will be greater in workplaces where there is negotiation over training and learning.*

Methods

Sample

This article analyses data from Unionlearn's 2009 survey of ULRs. Previous surveys were conducted in 2000, 2003, 2005 and 2007. The 2009 survey was the most comprehensive in scope. It was innovative in two key respects; first, whereas previous studies relied on excluding inactive ULRs at the analysis stage, the 2009 survey comprised of separate questionnaires for active and inactive ULRs; second, it introduced questions related to ULR activity in recruiting new members and their impact on interest in union membership.

The sampling frame was Unionlearn's database of 10,713 individuals who had undergone ULR training. Questionnaires were distributed by post and email to each individual. An initial filter question guided 'inactive' respondents to a separate, shorter, questionnaire that sought to determine reasons for their inactivity. In total, 1,292 ULRs responded to the survey. Of these, 968 responses were received from active ULRs and 324 from inactive ULRs, an overall response rate of 12.1 percent. Only data from active ULRs were used, in order to explore factors that influence *current* levels of activity and impact. The response rate, while low, is comparable to the 14 percent achieved in the previous survey of ULRs on which subsequent authoritative analyses were based (Bacon and Hoque, 2010; Hoque and Bacon, 2011).

As with all survey data, there was potential for non-response bias. Because only the contact details of non-respondents were available, it was not possible to test whether the demographics of our sample differed significantly from non-respondents. To minimize non-response, reminders were issued and an option to complete the questionnaire online was offered. Nonetheless, it is possible that respondents may have particularly strong positive or negative feelings about their role as a ULR. Questions can also arise over the reliability and validity of recall data, especially when the recall period is long and events or outcomes are not memorable (Dex and McCulloch, 1998). As with much previous research (see McIlroy and Croucher, 2013), the data is based on the perceptions of ULRs, who may be prone to overestimate their own activity and impact. By limiting the recall period to 12 months and asking respondents about events and outcomes that would be noteworthy in their capacity as a ULR, the reliability and validity of the data was maximised.

Data Analysis

Dependent variables

Four dependent variables were used to measure levels of ULR activity and impact. The 2009 survey introduced broader measures of workplace training and learning than previous surveys (see Bacon and Hoque, 2010). Consequently, an index was developed, which measured ULR activity across diverse aspects of the role. A second index was developed to capture ULRs' perceptions of their impact on different types of workplace training and learning. To assess the potential impact of ULRs to contribute to union renewal, two dependent variables were used – having recruited at least one new member in the previous 12 months and perceived interest in union membership.

Level of ULR Activity in Relation to Training and Learning (Activity Index)

Our index of ULR activity drew on the work of Bacon and Hoque (2009). Using data from the 2007 Survey of ULRs, they suggested that the *range* of tasks relating to the provision of training performed by a ULR is associated with positive impacts on training. Therefore, three variables were included to capture a range of tasks related to the provision of training information, advice and guidance, whether the respondent had: 'provided information and advice to colleagues on training and learning'; 'helped a colleague to get funding for learning'; 'arranged or helped to arrange courses for colleagues'. However, ULR activity is not concerned solely with providing practical guidance. As argued above, ULRs operate within a voluntaristic and neo-liberal training regime, a consequence of which is that much activity is reliant on managerial support. Providing themselves with information and data to lobby employers can be an important aspect of ULR activity. Following the work of Cassell and Lee

(2007) and Hoque and Bacon (2011), whether a ULR had 'conducted a learning needs assessment', was included to capture this dimension of activity. A final measure, 'meeting and networking with other ULRs', was designed to reflect the degree of integration in broader union networks, which offer the potential to exercise influence and hence have a positive impact on training and learning (Bacon and Hoque, 2009).

Initially 'recruiting a new member to the union' was included. The six dichotomous responses were used to form a summative scale measuring overall activity. However, an inspection of inter-item and item-total correlations suggested that 'recruiting a new member' was relatively weakly correlated with the scale (Spearman's Rho .193). Removing the item resulted in a small increase in Cronbach's α (from .62 to .64), therefore it was decided not to retain the item in the activity scale, but to include it as a dependent variable, as it appeared to be capturing a separate dimension of union activity. Descriptive statistics for the five- item 'activity' scale are presented in Appendix A.

Impact on Participation in Workplace Training (Training Index)

Following Bacon and Hoque (2009), our index was designed to capture the *breadth* of ULRs' perceived impact on training, from basic numeracy and literacy for the most disadvantaged workers, to Continuing Professional Development (CPD) courses, frequently undertaken by graduates and professionals (Unionlearn, 2015). By including variables to measure impact on both recognised vocational, academic and job-related training, participation and perceived impact across a range of transferable and non-transferable skills were captured. Individual ULRs may rate their impact on one aspect of training highly, while having little impact in other

areas. In designing a summative index, positive impact across several forms of training was measured.

Responses were coded on a five point Likert scale ranging from 1, 'greatly decreased', to 5, 'greatly increased'. Scores were summed across six variables to produce a 'training index'. Inspection of inter item and item-total correlations did not provide a strong statistical case for excluding any of these items (for descriptive statistics see Appendix B).

For each index, only those ULRs who responded to all of the items are included in the analyses. Although excluding cases with missing data may introduce an element of bias, including such cases by assigning scores based, for example, on the mean or the middle category, can influence the results. The data yielded a reasonably large sample of cases without missing data. For the activity scale, n= 881 and for the impact on workplace training n= 847. It was decided, therefore, to exclude cases with missing data on these variables.

Impact on Recruitment and Interest in Union Membership

To explore the impact of ULR activity on union renewal, two dependent variables were used. The first provides an objective measure of whether or not the respondent had recruited a new member to the union in the previous 12 months (coded 1=yes, 0=no). The second is based on ULRs' perceptions of whether their activities had increased interest in union membership (1=yes, 0=no). Seventy-two per cent of the sample had recruited at least one new union member and 68 percent believed their ULR activities had increased interest in union membership, suggesting some support for the argument that union learning can result in improved attitudes towards unions, leading to increased membership. It is not argued that

these measures represent a proxy for union renewal. Recruitment of new members is only one aspect of improved union organisation and an over-emphasis on recruitment arguably deflects from building sustainable organising capacity (Simms et al., 2013). Nonetheless, in the context of the debate outlined above, the ability of ULRs to recruit, or to generate interest in union membership is a necessary condition for them to have a positive effect on union renewal.

Explanatory Variables

Workplace characteristics and managerial support

To test our six propositions related to the 'incorporation thesis', a set of variables to measure organisation size were developed, union density, sector and managerial support. Data measuring these characteristics were not collected at interval level, consequently dummy variables were used in respect of organisation size and union density. For organisation size, the reference category was organisations with 250 or fewer employees and for union density workplaces with union density of 20 percent or less. A further dummy variable was included to indicate whether the workplace was in the public sector, in order to test for any residual 'public sector' effect when other variables were held constant.

In addition, a set of three dummy variables were developed to gauge the level of support ULRs received from management. The first measured whether or not ULRs received cover for their ULR activities; the second whether the ULRs' workload was reduced to allow them to engage in ULR work. A key development is the introduction of a statutory right to paid time

off to undertake ULR activity. Consequently, a dummy variable to measure whether ULRs received reasonable time off to conduct their duties was included.

Taken together these two sets of variables allowed the exploration of arguments that ULR activity and impact in relation to training and union renewal will be largely confined to amenable contexts (Lloyd and Payne, 2007; McIlroy, 2008).

Collective Workplace Institutions and Negotiation

To test our six proposals reflecting the 'critical engagement' approach, a third set of explanatory variables was developed to capture the role played by collective workplace institutions of union learning. These have been argued to underpin increased ULR activity and impact (Munro and Rainbird, 2004; Stuart et al., 2013). Separate dummy variables were included to indicate the presence of: a learning agreement; a union learning centre; a formal learning partnership, and a learning committee. Learning partnerships provide the broad context for employer-union co-operation over workplace learning. They are often underpinned by learning agreements, which set out aims and objectives and codify matters such as time off for ULR activity. These aims and objectives can be operationalised through learning committees involving union and management representatives. Finally, union learning can be facilitated through union learning centres, which provide a central hub within a workplace for information, advice and provision of union-led training.

For our final explanatory variable, a dummy was developed to specify workplaces where negotiation over training and learning takes place. It has been argued that the inclusion of

training within the collective bargaining agenda is critical in stimulating union learning (Heyes and Stuart, 1998). Moreover, evidence has pointed to a link between improved training outcomes from ULR activity and the conduct of negotiation and consultation (Bacon and Hoque, 2010).

Regression Analysis

Three modelling techniques were used; binary logistic regression; ordered probit and ordinary least squares (OLS) regression, to take account of the different levels of measurement of the dependent variables. For the two single dichotomous dependent variables (measuring recruitment and interest in union membership) binary logistic regression was used. For the two indices, OLS and ordered probit models were estimated. Some commentators argue that the application of the traditional OLS models for ordinal dependent variables is not appropriate (Long 1997; McCullagh 1980) and that an ordered model will produce more reliable estimates. However, because it is based on a 'latent variable' model, it is important to ensure that an ordered model is appropriate for the dependent variable. As a general guide, Long and Freese (2006) suggest that the ordered outcomes should represent an underlying, or latent, continuous outcome that has a natural order. In short, the ordered outcomes of the dependent variable should represent discrete categories of an underlying latent scale. The activity index represents an underlying scale measuring levels of ULR activity in relation to training and learning while the training index measures perceived levels of impact on participation in workplace training.

Results generated by the two methods were broadly similar and pointed to the same associations between ULR activity in relation to training and learning, perceived impact on participation in workplace training, and our explanatory variables. However, because the ordered probit model is based on a latent variable model, the coefficients do not have a direct interpretation. Rather, interest lies in the marginal probability effects, that is, the shift in the distribution of the outcome categories associated with a change in the explanatory variables (Boes and Winkelmann, 2006). The composite training index generated values ranging from 6 to 35 (some 29 categories), making comparison of marginal effects cumbersome and difficult to interpret in a meaningful way. Given the similarity of the results generated by the ordered probit and OLS models, the original 29 category dependent variable was retained and the results of the OLS regression are presented. This avoids losing information by collapsing the data into a smaller number of categories suitable for ordered probit regression analysis.

For the ULR activity index, the results of an ordered probit regression and marginal effects for belonging to the last category are presented, that is the marginal effect of having taken part in all five ULR activities in the previous 12 months.

Results

Proposition 1 - Levels of ULR Activity

The results of our ordered probit model for levels of ULR activity are presented in Tables 1 and 2. These suggested that workplace characteristics play a key role in shaping activity. Union density (of 80 percent or above) and organisational size (more than 250 employees) were positively associated with levels of activity and both were statistically significant at the one percent level. ULRs in workplaces with union density greater than 80 percent were 13 times more likely to record high levels of activity than those in the reference category (density < 20 percent). Those in medium sized workplaces (250 to 1000 employees) and those in large workplaces (more than 1,000 employees) were around 11 percent more likely to record high levels of activity than ULRs in smaller workplaces. Overall this suggested that ULRs are likely to prosper in large organisations with strong unions, thus supporting proposition 1a and those who have argued that activity will be limited to conducive contexts (McIlroy, 2008; Lloyd and Payne, 2007).

Tables 1 and 2 about here

However, a key tenet of this argument is that the lack of statutory support for union learning and emphasis on workplace partnership makes ULRs reliant on managerial support. There was no evidence of this in tables one and two - none of the relationships between aspects of managerial support and activity were statistically significant, thus there was little support for proposition 1b.

In contrast, the critical engagement thesis suggests that the existence of workplace learning institutions both reflects the ability of union learning to stimulate more collective approaches to learning and provides a basis for ULR activity. Support for this, and therefore proposition 1c, was only partial – table one suggested that only the presence of Learning Committees was significantly and positively related to ULR activity. ULRs in such workplaces were around 10 percent more likely to have taken part in all five activities than those where no Learning Committee was present. However, proposition 1d was strongly supported as ULR activity was positively and significantly associated with negotiations taking place over learning and training. In fact, ULRs in workplaces where such negotiations took place were 23 percent more likely to score highly on the activity index.

Proposition 2 - Perceived Impact of ULR Activites on Training and Learning Outcomes

Table 3 sets out our OLS regression to model the perceived impact of ULR activities on training and learning outcomes. Neither workplace characteristics nor items indicating managerial support were statistically significant, thus refuting propositions 2a and 2b. This suggested that 'structural' factors may not have as great a limiting effect as has been argued previously. Here evidence was consistent with the argument that the impact of ULRs is closely associated with workplace learning institutions and collective bargaining (propositions 2c and 2d). Table 3 shows a significant effect for joint regulation – in short where either learning agreements were in place, learning committees were in operation, or negotiation over learning and training issues took place, perceived training outcomes were improved. Again, negotiation

over training and learning had the largest coefficient, with presence of negotiation associated with a 1.5 increase in 'training' score, when all other explanatory variables were held constant. However, it should be noted that overall, the explanatory power of our model predicting the impact on training was relatively low (Rsq 0.15), suggesting that training outcomes were influenced by a much wider range of factors.

Table 3 about here

Proposition 3 - Recruitment and Interest in Union Membership

Finally, Table 4 presents two binary logistic regression models, the first models 'having recruited at least one new member in the previous 12 months', the second 'perceived interest in union membership resulting from ULR activity'. These results provide some indication of the potential of ULR activity to enhance union organisation. Following McIlroy (2008), these effects might be expected to be restricted to workplaces in which the union is already strong (proposition 3a). However, the findings provided only partial support for this.

Table 4 about here

In respect of recruitment, ULRs in workplaces with density between 61 and 80 per cent were around twice as likely to report having recruited a new member as those in the reference category (density <20 percent). This suggests that workplaces with a solid base of membership to work from, but some scope for recruitment, may be most conducive for strengthening union organisation through union learning. However, our results offered only weak support for proposition 3a.

There was little evidence to support proposition 3b. In Table 4, none of the managerial support variables were statistically significant at the five percent level. There was little clear relationship between learning institutions and either dependent variable. The exception to this was the presence of learning committees, which was positively related to a perceived increase in interest in union membership. Therefore, only limited support for proposition 3c was found. Table 4 suggested that ULRs in workplaces where negotiation over learning took place were around twice as likely to have recruited at least one new member in the previous 12 months, than those at workplaces where negotiation was absent. They were also around twice as likely to report that they believed their work had increased interest in union membership, providing clear support for proposition 3d.

Discussion

The controversy over the impact of union learning on training, skills and union organisation can be framed in terms of the competing influences of structure and agency. More specifically,

it can be argued that the debate revolves around the nature of the inter-relationship between union agency and the structures within which union learning is operationalised (Moore, 2011). For those writers associated with what Stuart and Rainbird (2011) have termed the 'critical engagement thesis', ULRs are able to navigate through, and use, existing structures of union learning to improve training outcomes and extend union influence – for example learning partnerships can provide a foundation for developing joint regulation over training, increasing the profile of union activity and attracting new members. In contrast, the 'incorporation' perspective emphasises the power of structural constraints. Accordingly, the reliance on 'partnership' means that, at best, ULR activity in relation to both training and union renewal will be restricted to settings where trade unions are strong and ULRs enjoy managerial support (McIlroy, 2008; Lloyd and Payne, 2006; McIlroy and Croucher, 2013).

The findings outlined above certainly point to the importance of structure in shaping the activity of ULRs, which is likely to be higher in larger organisations with high levels of union density. This is neither surprising nor new (see also Saundry et al., 2010; Bacon and Hoque, 2008) as greater numbers of union members will generate a greater demand for union learning. However, the evidence in relation to impact was less clear. Although the data suggested that recruitment of new members by ULRs was more likely in organisations with relatively high density, recruitment in less unionised organisations still takes place - around two-thirds of ULRs in organisations with union density below 40 percent had organised courses and recruited new members in the previous 12 months (Saundry et al., 2010).

Perhaps more importantly, the incorporation perspective implies that the structural limitations of union learning render ULRs dependent on managerial approval and therefore likely to act as 'foot soldiers' for managerial interests rather than advancing worker interests (McIlroy and Croucher, 2009). This is not supported in the analysis above – neither activity nor impact was associated with our proxies for managerial support. In contrast, the critical engagement thesis views collective learning institutions such as partnerships and learning agreements as both a foundation for, and a consequence of, ULR activity and impact. There was little evidence that the existence of learning partnerships and learning centres was influential in shaping activity or outcomes in respect of training and/or union organisation. Furthermore, the presence of a learning agreement was only found to have a positive (and relatively weak) relationship with ULRs' perceptions of their impact on training.

However, the existence of learning committees was positively related to activity and impact in relation to both training and increased interest in union membership. Such committees not only represent evidence of the ULR role being embedded within workplace employment relations but also underline the inter-relationship between ULR activity and impact and collective dialogue over learning (Rainbird and Stuart, 2011). Our findings in relation to the role of negotiation over learning and training in determining levels of activity and impact provided some support for this argument. For each of our models, only one factor had a consistently positive effect on activity and impact on learning, generating interest in membership and recruiting new members. Where negotiations took place between ULRs and employers, not only was ULR activity in relation to training and learning likely to be significantly higher, but the impact of that activity was perceived to be greater than in

workplaces with no negotiation (see also Bacon and Hoque, 2010). In addition, the likelihood of both having recruited at least one new member to the union and perceiving that ULR activity had increased interest in trade union membership was substantially greater.

It might be argued that the importance of negotiation simply reflects the relative ease of developing ULR activity and delivering outcomes in workplaces with well-developed management-union relations. However, the fact that negotiations over learning exerted an effect independent of both workplace characteristics and managerial support suggests that the role played by ULRs is not diametrically opposed to, but critically intertwined with notions of collective bargaining (cf. McIlroy and Croucher, 2013).

Conclusion

Critics of union learning reject claims of structural determinism (McIlroy and Croucher, 2013; Daniels, 2009), and suggest that their doubts relate to a lack of convincing empirical data. However, their objection is fundamental and rooted in a particular conception of the ULR as playing an advisory role juxtaposed against the traditional bargaining orientation of the shop steward. Furthermore, they argue that any suggestion that ULR activity can stimulate additional organising capacity is stymied by its reliance on the patronage of management.

Our analysis refutes the notion that ULRs are merely managerial 'foot soldiers'. Not only is there little evidence that managerial support is a major influence on the impact of ULR activity, there is a strong and consistent association between the conduct and infrastructure of negotiation over training and the extent to which ULRs affect learning outcomes, the profile of the union and the recruitment of new members. In short, the dichotomy between the 'advisory' role of the ULR and the 'bargaining' orientation of the shop steward, implied by the incorporation perspective is not supported. Instead those institutions which shape ULR activity and impact are those which involve some degree of joint regulation.

This has broad implications for academic debate over union renewal. The duality implicit within the incorporation perspective reflects distinctions between servicing and organising, and partnership and organising, which, as Simms and Holgate (2010) have argued obscures the purpose of organising. The fact that the prime function of ULRs is the provision of learning 'services' to members does not necessarily render them implausible as an engine of increased union activity and organisation. Instead, the key issue which future research should address is the extent to which the ULR role can provide a sustainable route through which new activists are drawn into wider union activism and in turn whether this can be converted into enhanced workplace influence and bargaining power. In addition, this research underlines the importance of trade unions taking a broader perspective of the ULR role. In particular, they need to ensure that new ULRs, who may begin with a relatively narrow view of their role, are supported and effectively integrated into existing branch structures, where they will be more likely to link their union learning activity to wider organising and bargaining objectives.

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Appendix A - Dependent Variables

ULR Activity Index

Responses are dichotomies coded 1=yes 0=no.

Question:	**Mean**
Provided information and advice to colleagues on learning opportunities?	0.94
Helped colleagues to get funding for learning?	0.48
Arranged (or helped to arrange) courses for colleagues?	0.76
Conducted a learning needs assessment?	0.52
Met and/or networked with ULRs from other workplaces?	0.78

N=881

Scale Min 0 Max 5

Scale mean 3.5 Standard deviation 1.4 Cronbach's Alpha .64

ULR Impact on Workplace Training Index

Responses are coded using a five point Likert scale ranging from 1 greatly decreased to 5 greatly increased

Question:	**Mean**
Has the no. of your members involved in:	
- training leading to vocational /academic qualification been affected by your ULR activity	3.73
- apprenticeships been affected by your ULR activity	3.12
- job-related training not leading to formal qualifications been affected by your ULR activity	3.50

- training in basic numeracy and literacy skills been affected by your ULR activity	3.73
- continuing professional development been affected by your ULR activity	3.55
- personal interest/ leisure courses been affected by your ULR activity	3.58

N= 674 Min 6 max 35

Scale mean 21.2 Standard deviation 3.3 Cronbach's Alpha .77

Appendix B - Explanatory Dummy Variables

Workplace Characteristics	**Mean**	**St Dev**
Union Density 20-40%	0.07	0.26
41-60%	0.15	0.36
61-80%	0.24	0.43
> 80%	0.37	0.48
Reference category <20%		
Org size 250-1,000 employees	0.12	0.32
> 1,000 employees	0.66	0.47
Reference category <250 emps		
Public sector	0.69	0.47
Managerial Support		
Time off for ULR activities	0.76	0.42
Cover provided	0.41	0.49
Workload reduced	0.27	0.44

Collective Workplace Institutions		
Formal Learning Agreement	0.64	0.48
Formal Learning Partnership	0.54	0.49
Learning committees	0.56	0.49
Learning Centre	0.32	0.46
Negotiation		
Negotiation over training and learning	0.65	0.47

Table 1 – Ordered Probit Model for the Activity Index

	Activity Index			
	Coef.	Std. Err.	Z statistic	P (z)[1]
Workplace Characteristics				
Union Density 20-40%	0.209	0.213	0.98	0.328
Union Density 41-60%	-0.172	0.174	-0.98	0.323
Union Density 61-80%	0.216	0.165	1.31	0.192
Union Density >80%	0.443**	0.158	2.80	0.005
Public Sector	0.122	0.103	1.18	0.234
Org size 251-1000 employees	0.359*	0.167	2.15	0.032
Org size > 1000 employees	0.367**	0.119	3.08	0.002
Management Support				
Time off for ULR activity dummy	0.047	0.124	0.37	0.707
Provide cover dummy	-0.021	0.108	-0.19	0.848
Reduced workload dummy	0.192	0.114	1.68	0.092
Collective Workplace Institutions				
Formal Learning Agreement dummy	0.109	0.119	0.95	0.357
Formal Learning Partnership dummy	0.068	0.114	0.59	0.553
Learning Centre dummy	0.153	0.109	1.40	0.161
Learning committees dummy	0.311*	0.104	2.99	0.003
Negotiation				

[1] *p-value for the z statistics which test for the null hypothesis that an individual predictor's regression coefficient is zero given that the rest of the predictors are in the model. The test statistic **z** is calculated as the ratio of the Coef. to the Std. Err. of the respective predictor*

Negotiate over Training and Learning	0.723*	0.105	6.88	0.000
No of observations	*583*			
Prob > chi2	*0.00*			

** p > .01 * p < .05

Table 2 - Marginal Effects of Scoring 5 on the Activity Index

	Marginal Effects
Workplace Characteristics	
Union Density 20-40%	0.065
Union Density 41-60%	-0.054
Union Density 61-80%	0.067
Union Density >80%	0.130
Public Sector	0.038
Org size 251-1000 employees	0.112
Org size > 1000 employees	0.115
Management Support	
Time off for ULR activity dummy	0.014
Provide cover dummy	-0.006
Reduced workload dummy	0.060
Collective Workplace Institutions	
Formal Learning Agreement dummy	0.034
Formal Learning Partnership dummy	0.021
Learning Centre dummy	0.048
Learning committees dummy	0.097
Negotiation	
Negotiate over Training and Learning	0.227

Table 3 - OLS Regression Model for ULR Impact on Training Index

ULR Impact on Training	Coef.	Std. Err.	P
Workplace Characteristics			
Union Density 20-40%	0.009	0.656	0.989
Union Density 41-60%	-0.837	0.536	0.119
Union Density 61-80%	0.283	0.508	0.577
Union Density >80%	0.031	0.484	0.949
Public Sector	0.215	0.307	0.484
Org size 251-1000 employees	-0.068	0.505	0.892
Org size > 1000 employees	-0.161	0.359	0.653
Management Support			
Time off for ULR activity dummy	0.519	0.379	0.171
Provide cover dummy	-0.453	0.325	0.164
Reduced workload dummy	0.074	0.341	0.828
Collective Workplace Institutions			
Formal Learning Agreement dummy	0.803*	0.359	0.026
Formal Learning Partnership dummy	0.472	0.340	0.166
Learning Centre dummy	0.210	0.323	0.515
Learning committees dummy	0.903**	0.317	0.005

Negotiation			
Negotiate over Training and Learning	1.531**	0.322	0.000
_cons	18.858	0.597	0.000
N=	587		
R sq	0.15		

** p < .01 * p < .05

Table 4 – Binary Logistic Models for Recruiting and Increasing Interest in Union Membership in the previous 12 months

	Recruited a member	**Increased interest in union membership**
	Odds Ratio	**Odds Ratio**
Workplace characteristics		
Union Density 20-40%	0.976	1.050
Union Density 41-60%	1.293	1.282
Union Density 61-80%	*2.264***	*2.608***
Union Density >80%	1.463	1.501
Public Sector	1.085	1.121
Org size 251-1000 employees	0.957	0.552
Org size > 1000 employees	1.253	0.358
Management support		
Time off for ULR activity dummy	0.848	1.040
Provide cover dummy	1.265	1.566
Reduced workload dummy	1.100	1.293
Collective workplace institutions		
Formal Learning Agreement dummy	0.928	0.928
Formal Learning Partnership dummy	1.067	0.980
Learning Centre dummy	0.650	0.808
Learning committees dummy	1.120	1.546*
Negotiation		

Negotiate over Training and Learning	*2.055***	*1.990***
_cons	1.38	0.801
Number of observations	*611*	*608*
Log likelihood	*-308.952*	*-326.514*

** p < .01 * p < .05