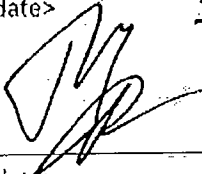
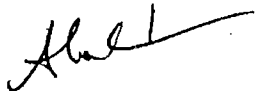


## Productivity Education and Training Fund (PET Fund)

### The Union Education Foundation

#### Outline Plan

From: 1 January 2014 to 31 December 2014

Approval of this Outline Plan		Signature and Date
The Union Education Foundation	Delegate: Tim Lyons Assistant Secretary ACTU Director, TUEF	<date> 31/1/14, x 
Department of Employment	Delegate:  Branch Manager responsible for programme	<date> x  8/4/14

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**1 Introduction**

This document is the Outline Plan for the implementation of the Productivity Education and Training Fund (PET Fund) during the period 1 January – 31 December 2014. It establishes:

- what the project is to deliver from 1 January – 31 December 2014;
- critical dates and project schedule;
- any changes to the Milestones and Deliverables Plan, as varied, in how the project will be governed – who is responsible for what; and
- any changes to the Milestones and Deliverables Plan, as varied, in how the project will be managed – for example how will changes be dealt with; handling of risks and issues.

This document reflects the agreement between the Department of Employment and The Union Education Foundation (TUEF) about the work to be undertaken and how it will be undertaken.

This document and the Milestones and Deliverables Plan will be reviewed regularly by the Project Team to ensure that they accurately represent the project status and intentions.

**Summary of Project Status**

In the Milestones and Deliverables Plan, TUEF committed to the following milestones and timelines:

Milestone	Completion Date
Scope / Research Phase 1	October 2013 (complete)
Planning and Development Phase 2	October 2014 (commenced)
Final Project Plan submitted to TUEF Board	November 2014
Project Implementation	From November 2014 to June 2022

In 2014 TUEF will complete curriculum development to enable implementation of a long-term program of education and skills development, consistent with its Funding Agreement with DoE for the PET Fund Project for the period 2012-2022 and the Milestones and Deliverables Plan.

TUEF notes that 2014 is the last full year of implementation of its National Workplace Education Program (NWEF) Project, also the subject of a Funding Agreement with DoE. In that context, TUEF advises with respect to the 2014 Outline Plan for the PET Fund Project:

- Consistent with TUEF’s continuing commitment under the NWEF Project, the majority of TUEF education programs will continue to be delivered under the NWEF Project in 2014. These education activities were documented in the TUEF 2014 NWEF Annual Project Plan, submitted to DoE 19 November 2013.
- A number of TUEF education programs will commence delivery under the PET Fund Project from 2014, where curriculum development has been completed or is underway to align the outcomes of the programs with the objectives of the PET Fund Project.
- To ensure a long-term program of education and skills development consistent with the objectives of the PET Fund can be implemented from November 2014, all curriculum development work will be undertaken under the auspices of the PET Fund Project from 2014. These activities are documented in this PET Fund 2014 Outline Plan.

## 2 Deliverables

Provide a schedule of planned activities that will be undertaken from 1 January 2014 to 31 December 2014 including:

- Detail of activities proposed, for example: courses, research projects, publications.
- Delivery Targets (number of courses, projects, publications completed)
- Coverage targets (Industry, geographic)
- Participation Targets (number of participants, users)
- Participant Evaluation Targets (overall participant and/ or user satisfaction level regarding deliverables)

It may be more convenient to provide the Schedule of Activities as an attachment to this Outline Plan (eg: spreadsheet or table).

### 2.1 Delivery of Training Programs

The purpose of the PET Fund Project is to make available funding to "create a long term program of education and skills development to support cooperative and productive workplace relations that promotes national economic prosperity and social inclusion for all Australians".

The Funding Agreement further states "the Grant builds on the program's initiative under the National Workplace Education Program (NWEPP) that facilitated the initial period of operation of the *Fair Work Act* 2009."

Courses offered by TUEF under this project are aimed at improving the skills and knowledge of employee representatives to enable these outcomes.

#### **Multi Union - Scheduled Training**

At the time of writing TUEF proposes to offer 33 scheduled training courses under the PET Fund Project in 2014, excluding Online Training.

In 2014 TUEF will offer the following new, revised and pilot scheduled courses:

- **NEW - Training Skills as Certificate IV in Training and Assessment** – As foreshadowed in the PET Fund Outline Plan for the period 1 July – 31 December 2013, in the latter half of 2013 TUEF further developed an optional component in the Training Skills for Union Educators course, enabling participants to obtain an accredited Certificate IV in Training and Assessment. The two pilot courses carried out in 2013 (delivered under the NWEPP Project) demonstrated significant demand for the opportunity to obtain the Certificate IV qualification. From 2014 this course will be delivered under the PET Fund Project.
- **PILOT - Leadership Seminars** – following consultation with affiliate leadership in 2013 on skills development and training needs, TUEF will offer a schedule of seminars to those in positions of leadership. The seminars will be presented by a guest speaker, in an intensive, short format to meet market demand and participant availability, and will address current issues and trends in economic policy, theories of productivity, workplace relations and leadership skills and practice.
- **PILOT - Productivity for Unions** - Recognising that the objectives of the PET Fund Project require specific consideration of productivity in the context of the enterprise bargaining process, TUEF is completing curriculum development of a 1 day specialist course, Productivity for Unions, for pilot in 2014.

- **PILOT - Experienced Organiser (EO) Program, incorporating Certificate IV in Unionism and Industrial Relations** - This new program is currently being developed and is intended for experienced and lead organisers who have worked in the union movement for four or more years. The course will be delivered through classroom and workplace-based training, providing a more flexible opportunity for the intended participants to gain a nationally accredited industry standard qualification, the Certificate IV in Unionism and Industrial Relations.

Please refer to **Appendix A: PET Fund Course Schedule and Course Descriptions 2014** for further detail regarding 2014 scheduled courses by location, date and for course descriptions.

The course schedule necessarily responds to market demand and a range of dates and courses is initially offered to the market to attract enrolment, understanding that some courses may be rescheduled, combined or cancelled in response to market demand. TUEF may also receive requests to run courses in addition to those listed in Appendix A. Any additional activity will be reported as part of summary reporting.

As the course schedule can change in response to market demand, TUEF will also provide DoE with an updated, current PET Fund Course Schedule on 31<sup>st</sup> July 2014, as part of mid-year financial reporting required under Funding Agreement for the PET Fund Project.

To ensure the most effective use of the PET Fund Grant Monies, TUEF will require a minimum number of 8 participants to deliver each scheduled course. This may be waived by the Project Manager if delivery of the training is deemed to be important in meeting key objectives.

#### ***Single Union - Non Scheduled Training***

All courses offered by TUEF are available for delivery to individual unions on demand. It is not possible to predict demand for this work in advance with accuracy.

In 2014 TUEF has established a delivery target of 9 days of non-scheduled training.

This target reflects that the majority of the courses to be offered through the PET Fund Project in 2014 are unlikely to be requested on a single-union basis, being primarily multi-part skills training and leadership-level courses.

The courses that TUEF consider may attract demand for single-union non-scheduled training are Union Governance and Workplace Bullying and Harassment. Please refer to **Appendix A – PET Fund Course Schedule and Course Descriptions 2014** for further information.

As for multi-union scheduled training, TUEF requires a minimum number of 8 participants for each single-union non-scheduled training course.

#### ***Online Training***

**Union Governance Training Online** – In 2014 TUEF will offer Union Governance training online, as a flexible, ongoing alternative for those unable to attend face-to-face training. TUEF anticipates offering this course from the second quarter of 2014, subject to approval by the Fair Work Commission.

## **2.2 Curriculum Review and Development Activity**

The *Milestones and Deliverables Plan 2012* commits TUEF to delivery of the Planning and Development Phase 2 by October 2013 and full implementation of the PET Fund Project from November 2014.

In that context, and to create a long term program of education and skills development for implementation under the PET Fund by that date, all curriculum development work will be undertaken under the auspices of the PET Fund Project in 2014, and will include the following activities:

- Piloting and implementation of new curricula consistent with market demand and the objectives of the PET Fund Project – this includes the three pilot courses described previously in section 2.1: *Leadership Seminars, Productivity for Unions, and Experienced Organiser (EO) Program Incorporating Certificate IV in Unionism and Industrial Relations*. Each of these courses is intended to offer advanced skills development for experienced organisers, specialists and senior officials, in a delivery mode accessible to the target audience.
- Review of current TUEF curricula to assess consistency with the objectives of the PET Fund Project – It is not assumed that all curricula, including that currently delivered under the NWEF project, will be offered under the PET Fund Project from 2015. In order to prepare a Final Project Plan for the TUEF Board in November 2014, consistent with the Milestones and Deliverables Plan, all current curricula will be assessed for consistency with the objectives of the PET Fund Project.
- Review of course content, structure or delivery in response to reduced market demand – Some TUEF courses experienced reduced demand in 2013. In some instances this may be due to the time commitment required or a market preference for similar but accredited courses. An initial priority for review in this context is *Craft of Organising*. This course will be offered under the PET Fund Project in 2014 so that curriculum review and feedback from any courses delivered can be considered in the context of outcomes of the Pilot *Experienced Organiser (EO) Program Incorporating Certificate IV in Unionism and Industrial Relations*, as it is anticipated that organisers may be attracted to a more flexibly delivered accredited program than the existing, non-accredited *Craft of Organising* course.
- Review of content due to statutory amendment or other changes to the workplace relations system – TUEF will continue to update curricula to ensure consistency with current statute and policy, as required.

### 2.3 Publications / Marketing

Proposed activities for 2014 include:

- Publication of 2014 Course Guide
- Preparation of 2015 Course Guide & Calendar
- Update of web page and online promotion of courses
- Continued implementation of marketing strategies. In 2014 promotion of TUEF PET courses will be implemented through ongoing design and delivery of 'whole-of-ACTU' services marketing strategies. This will be implemented, for example, through:
  - A gradually increased presence of the 'Australian Unions' brand in ACTU Organising Centre print and online publications, as a unifying marketing tool for ACTU-related entities which will enable more targeted, centralised marketing of the range of services offered by ACTU-related entities, and reducing multiple messages from the various entities to affiliates and their members.
  - Reduction of the number of ACTU-related websites, which is hoped will enable a less diffuse and more targeted presentation of ACTU-related services, including education courses.

This approach was proposed in the 2014 NWEF Annual Project Plan, submitted to DoE 19 November 2013, following internal review of TUEF course marketing and identification of a need for promotion of a broader, consolidated offering of services by ACTU and related entities to affiliates and partners. TUEF considers this approach is likely to increase visibility of its current offering to affiliates, thereby improving enrolment.

## 2.4 Professional Development of Staff

Staff development will be met through:

- All educators attending a 4-day Planning and Development meeting in March 2014. This is an annual event.
- Internal coaching and mentoring.
- Attendance at relevant training and skills development courses, as appropriate.
- To ensure high quality delivery of programs TUEF will also continue to ensure that all trainers co-train with an experienced trainer the first time they deliver a course.

## 2.5 Delivery Targets for the period are:

Key Performance Indicator	Delivery Target	Comments
<b>Multi Union - Scheduled Training</b>		
Deliver 70% of scheduled training courses.	Delivery of 23 scheduled training courses	Calculated as 33 scheduled courses x 0.7. (Excludes Online Training, for which KPIs are proposed below.)
Achieve minimum attendance of 184 participants in scheduled training courses.	184 participants in scheduled training	Calculated as 23 scheduled courses x minimum 8 participants per course. (Excludes Online Training courses, for which KPIs are proposed below.)
Participant satisfaction rating of 4 or above	80% of participants providing satisfaction rating of 4 or above	Rating as measured by the Participant Evaluation Form for scheduled training using a scale 1-5 (1 being poor and 5 being excellent).
<b>Online Training</b>		
Union Governance	Completion of course by 50 participants	Completion of this course enables participants to meet the requirements of the <i>Fair Work (Registered Organisations) Amendment Act 2012</i> with respect to Financial Governance.
Participant satisfaction rating of 4 or above	80% of participants providing satisfaction rating of 4 or above	Rating as measured by the Participant Evaluation Form for scheduled training using a scale 1-5 (1 being poor and 5 being excellent).
<b>Single Union - Non-Scheduled Training</b>		
Deliver 80% of predicted non-scheduled training activity.	Delivery of 7 days of non-scheduled training activity	TUEF has set an overall target of 9 days of non-scheduled training in 2014. The delivery target is calculated as 9 days x 0.8.
Achieve minimum attendance of 56 participants in non-scheduled training activity.	56 participants in non-scheduled training activity	Calculated as 7 non-scheduled training days x minimum 8 participants per day.
Participant satisfaction	80% of participants	Rating as measured by the Participant

rating of 4 or above	providing satisfaction rating of 4 or above	Evaluation Form for scheduled training using a scale 1-5 (1 = poor and 5 being excellent).
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**2.6 Geographic and Industry Coverage**

- TUEF has allocated resource/s in NSW, VIC, QLD, WA, SA, and TAS.
- Scheduled training will be offered in all states and territories. Training resources can be provided in other regions as required.
- TUEF experienced reduced demand for scheduled and non-scheduled training in the Northern Territory in 2013 under the NWEF Project. This emerging risk is identified in Section 4 - Risk Management.
- Scheduled training courses are open to all unions, targeting all industries. A summary of industries reached will be included in Progress Reports.

**3 Governance**

Describe any proposed changes to Governance arrangements outlined in the Milestones and Deliverables Plan, as varied in previous Outline Plans, in regard to the means by which:

- the monitoring of funding received under the agreement will occur;
- the monitoring of the progress in developing and carrying out the Project will occur; and
- The Union Education Foundation will manage subcontractors, including reporting, risk management, monitoring of payments of funding received under the agreement and of the progress in developing and carrying out the Project.

TUEF does not propose any change to processes and systems for the monitoring of funding received under the Agreement, as detailed in the Milestones and Deliverables Plan.

With regard to monitoring the progress in developing and carrying out the Project, TUEF will monitor progress against:

- Milestones as agreed in the Milestones and Deliverables Plan; and
- Delivery Targets proposed in section 2.5 above.

Progress will be reported via Summary Reports of activities provided in accordance with Clause 11.1 of the Funding Agreement.

TUEF will not be engaging subcontractors for this project during this period.

Provide:

- Updated contact details of managerial or specified personnel.

Managerial and Specified Personnel	Role/Responsibilities	Contact Information
Tim Lyons Assistant Secretary ACTU Director TUEF	Role: Project Director  Responsibilities: Provides project oversight and direction on behalf of the TUEF Board.	ACTU Level 6, 365 Queen Street Melbourne VIC 3000



<p><b>Director</b> ACTU Organising Centre</p>	<p><b>Role: Project Manager</b></p> <p><b>Responsibilities:</b></p> <ul style="list-style-type: none"> <li>• Accountable to the TUEF Board and Project Director for delivery of the project in accordance with the Funding Agreement;</li> <li>• Primary point of contact on the project and responsible for accepting notices on behalf of TUEF.</li> </ul>	<p>ACTU Organising Centre Level 4, 365 Queen Street Melbourne VIC 3000</p>
<p><b>Assistant Director</b> ACTU Organising Centre</p>	<p><b>Role: Project Management Support</b></p> <p><b>Responsibilities:</b></p> <ul style="list-style-type: none"> <li>• Provides project management support to the Project Manager.</li> </ul>	<p>ACTU Organising Centre Trades Hall Building Level 3, 4-10 Goulburn Street, Sydney, NSW 2000</p>
<p><b>Compliance and Grants Manager</b> ACTU Organising Centre</p>	<p><b>Role: Project Officer</b></p> <p><b>Responsibilities:</b></p> <ul style="list-style-type: none"> <li>• Developing, implementing and managing administrative and financial systems to support the Project in accordance with the Funding Agreement;</li> <li>• Provides project management support to the Project Manager.</li> </ul>	<p>ACTU Organising Centre Level 4, 365 Queen Street Melbourne VIC 3000</p>
<p><b>Project Team</b> ACTU Organising Centre</p>	<p><b>Role: To provide specific skills and expertise as required.</b></p> <p><b>Project team members include:</b></p> <ul style="list-style-type: none"> <li>• <b>Educators ACTU Organising Centre.</b> Responsible for curriculum development and delivery of training courses and reporting on outcomes and evaluations.</li> <li>• <b>Online staff, ACTU Organising Centre.</b> Responsible for development and delivery of online curricula.</li> <li>• <b>RTO Compliance Officer, ACTU Organising Centre.</b> Responsible for compliance management with respect to nationally accredited courses.</li> <li>• <b>General Manager, ACTU.</b> Responsible for financial management advice.</li> <li>• <b>Administrative Coordinator, ACTU Organising Centre.</b> Responsible for business processes, course</li> </ul>	

	administration and support.	
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#### 4 Risk Management

Provide any updates to your risk management strategy in the Milestones and Deliverables Plan, as varied in previous Outline Plans, including any new risk you have identified.

Risk	Management Strategy	Likelihood (H/M/L)	Impact (H/M/L)	Control Rating (Poor/Good/Very Good)
Risk of mismanagement or fraud associated with the funds	<ul style="list-style-type: none"> <li>Maintenance of appropriate financial management systems.</li> <li>Regular financial reporting to the Project Manager by ACTU GM, including P&amp;L vs. Budget and Balance Sheets.</li> <li>Project progress reporting to the TUEF Board, including financial reporting.</li> <li>Accounts audited annually by an independent auditor.</li> </ul>	L	H	Very Good
Risks associated with management of subcontractors  Note: The risk management strategy outlined adjacent is consistent with that applied to NWEF subcontracting arrangements. TUEF will not be utilising any subcontractors during this period to deliver the Project.	<ul style="list-style-type: none"> <li>Subcontracting proposals will be assessed by the TUEF Board against their capacity to meet the objectives of TUEF's Funding Agreement with the Australian Government.</li> <li>Subcontractors must enter into a formal agreement with TUEF, which will specify requirements for progress reporting and management of funding.</li> <li>Ongoing monitoring of subcontracting arrangements by the Compliance and Grants Manager ACTU.</li> <li>Payments to subcontractors will be subject to acceptance of satisfactory progress reports in accordance with the Funding Agreement.</li> </ul>	L	H	Very Good
Insufficient attendance at scheduled training, affecting course delivery and participation  Note: The risk of	<ul style="list-style-type: none"> <li>Marketing of courses using internal and external networks</li> <li>Allowing adequate timeframes for advertising to</li> </ul>	M	H	Good

<p>insufficient attendance at Union Governance identified in the previous Outline Plan for the period July – December 2013 did not eventuate. This risk and management strategy has been amended accordingly to reflect the more generalised risk of Insufficient attendance.</p>	<p>potential participants</p> <ul style="list-style-type: none"> <li>• Course planning and review to ensure quality and relevancy</li> <li>• Course Evaluation Questionnaires to Inform review of courses</li> <li>• Briefings to be held in each States for Unions and TLCs on the objectives of the project</li> <li>• Re-scheduling of courses with low enrolments to meet market needs</li> </ul>			
<p>Staffing availability for scheduled training</p> <p>Note: The previous Outline Plan for the period July – December 2013 identified employment of a dedicated resource for implementation of Union Governance training as a management strategy in relation to this risk. That short-term appointment has concluded and other educators are now trained to deliver the course. This risk and management strategy has been amended accordingly to reflect the more generalised risk of staffing availability.</p>	<ul style="list-style-type: none"> <li>• TUEF has allocated training resources in NSW, VIC, QLD, WA, SA, and TAS.</li> <li>• Training resources can be provided in other areas on demand.</li> </ul>	L	H	Very Good
<p>Education content not of consistent high quality</p>	<ul style="list-style-type: none"> <li>• Professional development for staff</li> <li>• Professional mentoring for educators</li> <li>• Course Evaluations and Phone Survey used to review programs</li> <li>• Attendance at Training Skills for Union Educators / Certificate IV in Training and Assessment.</li> </ul>	L	H	Very Good

<b>Staffing availability for Curriculum Development and Review</b>	<ul style="list-style-type: none"> <li>• Identification of tasks and commitment of required skills and expertise in ACTU Organising Centre workplan.</li> <li>• Identification of alternative resources in the event of unforeseen changes to workplan or staff availability.</li> </ul>	M	H	Good
<b>Insufficient project scoping may lead to an underestimate of effort and complexity of project tasks, impacting project completion and/or budget.</b>	<ul style="list-style-type: none"> <li>• Ensure project requirements are sufficiently analysed and assessed in terms of effort, complexity, and cost.</li> </ul>	L	H	Good
<b>Emerging risk: Inadequate industry coverage and inconsistent delivery across industries / geography</b>  <b>Note:</b> The 2014 Annual Plan identified low enrolment in the NT as an emerging risk in 2013. To ensure this risk is considered during development and implementation of the PET Fund Project, this emerging risk has been included in this Outline Plan.	<ul style="list-style-type: none"> <li>• Allocated resources in NSW, VIC, QLD, WA, SA &amp; TAS to provide training.</li> <li>• Trainers can be flown in from other states to cover training schedule</li> <li>• Development of a strategic plan with NT Unions for 2014 to provide relevant and timely training for officials and delegates as required.</li> </ul>	M	H	Good

## 5 Approvals

Clause 8.1 of the Funding Agreement requires the Union Education Foundation to provide a list of any Assets it proposes to purchase or create during the relevant project period for Department of Employment approval. Approval of the Outline Plan will constitute approval to purchase those Assets specified in the agreed Outline Plan. Assets means any item of tangible property which has a value of over \$5,000 inclusive of GST (Clause 33 of the Funding Agreement)

- TUEF does not anticipate purchasing or creating any asset as defined in Clause 33 of the Funding Agreement during this project period.

Clause 7 of the Funding Agreement provides for the Department of Employment to give written approval of subcontractors.

- The Union Education Foundation does not anticipate engaging subcontractors under the PET Fund Project, during the period of this Plan.

Subcontractor	Role/Responsibilities
N/A	N/A

## 6 Budget

Provide a comprehensive budget including:

- Itemised expenditure for 1 January – 31 December 2014;
- A general outline of expenditure with regard to the remaining years of the Programme;
- Details of any assets the Union Education Foundation intends to purchase as referred to at Clause 8 of the Funding Agreement.
- Please ensure that all budget figures are GST exclusive.
- It may be more convenient to provide the Budget as an attachment to the plan. (eg spreadsheet or table)
- Please refer to Appendix B – 2014 PET Fund Project Budget
- Please refer to Appendix C – General Outline of Expenditure

Consistent with Clause 3.8 of the Funding Agreement any interest on the \$9m grant will be used for grant activities, in accordance with Clause 3.7 of the Agreement.

TUEF also advises that that any income received for delivery of single-union non-scheduled courses offered through the PET Fund Project will be used to extend the Project.

## 7 Evaluation of Performance against Objectives

Describe any proposed changes to mechanisms specified in the Milestones and Deliverables Plan, as varied by previous Outline Plans, by which the Union Education Foundation intends to evaluate performance against objectives.

Please note that data required to evaluate performance will need to be collected consistently throughout the life of the project.

### **Multi Union Scheduled Training and Single Union Non-Scheduled Training**

Evaluation of the performance of these activities against objectives will be undertaken through collection of quantitative and qualitative data, which will be evaluated against the delivery targets stated in Section 2.5 of this Outline Plan, ie.

- Course delivery
- Participation
- Participant Evaluation
- Geographic coverage
- Industry coverage.

Evaluation of performance against objectives will be reported in Summary Report of activities required under Clause 11.1(c) of the Funding Agreement. The Summary Report will also provide detailed information evidencing:

- the number, subject matter and level of the training programs or courses delivered;
- details of the industries covered by the training;
- names of the organisations to whose members training was provided;
- where the training was conducted;
- the number of people undertaking the training;
- the results of the training, including the number of successful completions;
- details of people involved in providing the training; and
- income and expenditure, including training cost.

The proposed evaluation mechanisms are consistent with those currently applied under the NWEF Project. This approach does not assume Education Activities currently delivered under NWEF will automatically transition to delivery under the PET Fund in future. It does, however, facilitate long-term collection of comparative performance data across the suite of training courses delivered, whether funded under the NWEF or the PET Fund projects.

In 2014 TUEF will also conduct an annual telephone survey of course participants under the PET Fund Project, as currently undertaken for courses delivered under the NWEF project, as a means by which performance will be evaluated against the objectives of the project.

#### **Curriculum Review and Development**

Curriculum Review and Development activities will be evaluated against target milestones and completion in the Milestones and Deliverables Plan 2012, ie completion of:

Milestone	Completion Date
Planning and Development Phase 2	October 2014
Final Project Plan submitted to TUEF Board	November 2014
Project Implementation	From November 2014 to June 2022

## **8 Submitting your Outline Plan**

Please email a signed copy of the completed PET Fund Outline Plan by close of business on Friday 31 January 2014 to: Damien Booth – Programme Manager, at the:

PET Fund Inbox - [PETFund@deewr.gov.au](mailto:PETFund@deewr.gov.au)

DESCRIPTION	STATE	START DATE			END DATE		
		DAY	DATE	MONTH	DAY	DATE	MONTH
Union Governance Train the Trainer	NSW	Thursday	6	February	Thursday	6	February
Union Governance Train the Trainer	QLD	Friday	7	February	Friday	7	February
Union Governance Train the Trainer	VIC	Wednesday	12	February	Wednesday	12	February
Union Governance Online	ONLINE	Monday	3	March	Wednesday	31	December
Union Governance Train the Trainer	VIC	Friday	7	March	Friday	7	March
Leadership Seminar	WA	Tuesday	11	March	Tuesday	11	March
Leadership Seminar	NSW	Friday	14	March	Friday	14	March
Union Governance Train the Trainer	NSW	Monday	17	March	Monday	17	March
Training Skills for Union Educators - Certificate IV in TAA - Part 1	NSW	Tuesday	18	March	Friday	21	March
Productivity for Unions	NSW	Wednesday	19	March	Wednesday	19	March
U&IR for Experienced Organisers - Induction	VIC	Thursday	20	March	Thursday	20	March
Union Governance Train the Trainer	QLD	Thursday	20	March	Thursday	20	March
Leadership Seminar	SA	Monday	7	April	Monday	7	April
Leadership Seminar	ACT	Wednesday	9	April	Wednesday	9	April
U&IR for Experienced Organisers - Organising Part 1	VIC	Thursday	10	April	Thursday	10	April
Leadership Seminar	TAS	Friday	11	April	Friday	11	April
Training Skills for Union Educators - Certificate IV in TAA - Part 2	NSW	Monday	14	April	Wednesday	16	April
Craft of Organising - Part 1	VIC	Monday	14	April	Thursday	17	April
Leadership Seminar	QLD	Monday	28	April	Monday	28	April
Leadership Seminar	NT	Wednesday	30	April	Wednesday	30	April
Productivity for Unions	VIC	Friday	2	May	Friday	2	May
Craft of Organising - Part 2	VIC	Tuesday	6	May	Friday	9	May
U&IR for Experienced Organisers - Union Values Part 1	VIC	Thursday	8	May	Thursday	8	May
Union Governance Train the Trainer	NSW	Monday	12	May	Monday	12	May
Union Governance Train the Trainer	QLD	Wednesday	14	May	Wednesday	14	May
Union Governance Train the Trainer	VIC	Wednesday	21	May	Wednesday	21	May
U&IR for Experienced Organisers - Organising Part 2	VIC	Thursday	5	June	Thursday	5	June
Craft of Organising - Part 1	SA	Monday	16	June	Thursday	19	June
Craft of Organising - Part 1	QLD	Tuesday	17	June	Friday	20	June
Productivity for Unions	QLD	Tuesday	24	June	Tuesday	24	June
Craft of Organising - Part 2	QLD	Tuesday	15	July	Friday	18	July
U&IR for Experienced Organisers - Communication Part 1	VIC	Thursday	17	July	Thursday	17	July
Craft of Organising - Part 2	SA	Monday	21	July	Thursday	24	July
Craft of Organising - Part 1	NSW	Tuesday	5	August	Friday	8	August
U&IR for Experienced Organisers - Union Values Part 2	VIC	Thursday	14	August	Thursday	14	August
Craft of Organising - Part 1	TAS	Tuesday	19	August	Friday	22	August
Training Skills for Union Educators - Certificate IV in TAA - Part 1	VIC	Tuesday	2	September	Friday	5	September
Craft of Organising - Part 2	NSW	Tuesday	2	September	Friday	5	September
Craft of Organising - Part 2	TAS	Tuesday	23	September	Friday	26	September
U&IR for Experienced Organisers - Bargaining Part 1	VIC	Thursday	2	October	Thursday	2	October
Training Skills for Union Educators - Certificate IV in TAA - Part 2	VIC	Tuesday	7	October	Thursday	9	October
Leadership Seminar	TAS	Monday	13	October	Monday	13	October
Leadership Seminar	VIC	Wednesday	15	October	Wednesday	15	October
Leadership Seminar	NSW	Friday	17	October	Friday	17	October
Leadership Seminar	WA	Monday	20	October	Monday	20	October
Leadership Seminar	SA	Wednesday	22	October	Wednesday	22	October
Leadership Seminar	QLD	Friday	24	October	Friday	24	October
U&IR for Experienced Organisers - Communication Part 2	VIC	Thursday	30	October	Thursday	30	October
U&IR for Experienced Organisers - Bargaining Part 2	VIC	Thursday	27	November	Thursday	27	November
U&IR for Experienced Organisers - Review & Evaluation	VIC	Thursday	11	December	Thursday	11	December

Appendix A - TUEF PET 2014 Course Schedule TRIMMED.xlsx

COURSE TITLE	TARGET GROUP	NUMBER OF INSTANCES PER STATE									
		ACT	NSW	NT	QLD	SA	TAS	VIC	WA	ONLINE	TOTAL
Craft of Organising#	Organisers	0	1	0	1	1	1	1	0	0	5
Leadership Seminar - PILOT	Officials	1	2	1	2	2	2	1	2	0	13
Productivity for Unions - PILOT	Specialists	0	1	0	1	0	0	1	0	0	3
Training Skills for Union Educators - Certificate IV in Training and Assessment#	Union Educators	0	1	0	0	0	0	1	0	0	2
Union Governance*	Officials	0	0	0	0	0	0	0	0	0	0
Union Governance - Online^	Officials	0	0	0	0	0	0	0	0	1	1
Union Governance - Train the Trainer	Union Educators	0	3	0	3	0	0	3	0	0	9
Unionism and Industrial Relations - Experienced Organiser Program PILOT# (Incorporating Certificate IV in Unionism and Industrial Relations)	Organisers	0	0	0	0	0	0	1	0	0	1
Workplace Bullying and Harassment*	Officials and Organisers	0	0	0	0	0	0	0	0	0	0
<b>TOTAL COURSES</b>		<b>1</b>	<b>8</b>	<b>1</b>	<b>7</b>	<b>3</b>	<b>3</b>	<b>8</b>	<b>2</b>	<b>1</b>	<b>34</b>

\* Our market research indicates these courses will be run as single union non-scheduled training.

# Indicates multi union scheduled training courses delivered in several parts. Each instance of the course recorded above is a total course.

^ Indicates a multi union scheduled training course delivered online and recorded as one course for the calendar year.



COURSE DESCRIPTIONS		
COURSE	TARGET GROUP	COURSE DESCRIPTION / JUSTIFICATION
Craft of Organising	Organisers	The Craft of Organising course is a 2-part program designed for experienced organisers that further develops knowledge and skills about the industrial system and laws including bargaining, communication with workers and employers, campaigning around and resolving issues of concern to workers, developing workplace delegates, a planned approach to their work, working with employers in the current industrial environment.
Experienced Organiser Program - PILOT (Incorporating Certificate IV in Unionism and Industrial Relations)	Organisers	This pilot program in 2014 is designed for experienced and lead organisers who have worked in the union movement for four or more years. The course builds on the organiser's knowledge and skills to advance their capacity and professionalism in the industrial system, including bargaining and dispute resolution, communication with workers and employers, campaigning around and resolving issues of concern to workers, developing workplace delegates, a planned approach to their work, working with employers in the current industrial environment. The course is delivered through classroom and workplace-based training, providing a more flexible opportunity for experienced organisers to gain a nationally accredited industry standard qualification, the Certificate IV in Unionism and Industrial Relations (U&IR).
Leadership Seminars - PILOT	Officials	This pilot program of short seminars in 2014 presents current issues and trends in economic policy, theories of productivity, workplace relations and leadership skills and practice.
Productivity for Unions - PILOT	Specialists	This one-day seminar will examine labour productivity and how it is measured, examine evidence about labour productivity in Australia and elsewhere and analyse examples of union and employer approaches to productivity in the enterprise bargaining process.
Training Skills for Union Educators, incorporating Certificate IV in Training and Assessment	Union Educators	The 2-part Training Skills for Union Educators course is designed for union trainers/educators who design and deliver their union's delegate courses, and builds knowledge of adult learning and skills required to design and deliver union training to workplace representatives. Participants may also choose to undertake 2 additional Learning Guides and complete assessments to achieve the accredited Certificate IV in Training and Assessment qualification.
Workplace Bullying and Harassment	Officials and Organisers	This course provides organisers with information on current legislative provisions and safeguards applicable to bullying and harassment in the workplace, and will equip them with the skills to deal with bullying and harassment issues being experienced by their members, to support development and maintenance of safe, fair and productive workplaces.
Union Governance Train the Trainer	Union Educators	Changes to the Fair Work (Registered Organisations) Act 2012 required all union officers with financial decision-making responsibilities (including elected officials, finance staff and members of management committee) to undertake Fair Work Commission-approved training in the area of Financial Governance by 29 December 2013. Some unions now have until June 2014 to comply.  The course covers four main components: the legal context of the financial governance changes; conflict of interest and disclosure of financial interests; financial management issues, and; reading and understanding financial reports. The course also provides guidance and supporting materials to enable participants to deliver the course content to their own union officers.  On completion of the course, participants will be provided with Certificates which will enable them to demonstrate they are compliant with the requirements of the Act. Where possible, Trainers certified by the Union Governance Train the Trainer course will deliver the course to their own union officers.
Union Governance	Officials and Organisers	Changes to the Fair Work (Registered Organisations) Act 2012 required all union officers with financial decision-making responsibilities (including elected officials, finance staff and members of management committee) to undertake Fair Work Commission-approved training in the area of Financial Governance by 29 December 2013. Some unions now have until June 2014 to comply.  The course covers four main components: the legal context of the financial governance changes; conflict of interest and disclosure of financial interests; financial management issues, and; reading and understanding financial reports. The course also provides guidance and supporting materials to enable participants to deliver the course content to their own union officers.  On completion of the course, participants will be provided with Certificates which will enable them to demonstrate they are compliant with the requirements of the Act.
Union Governance - Online	Officials and Organisers	Changes to the Fair Work (Registered Organisations) Act 2012 required all union officers with financial decision-making responsibilities (including elected officials, finance staff and members of management committee) to undertake Fair Work Commission-approved training in the area of Financial Governance by 29 December 2013. Some unions now have until June 2014 to comply.  This course enables regionally and remotely located officials, and those with limited time to attend face to face training, to undertake Union Governance training online.  The course covers four main components: the legal context of the financial governance changes; conflict of interest and disclosure of financial interests; financial management issues, and; reading and understanding financial reports. The course also provides guidance and supporting materials to enable participants to deliver the course content to their own union officers.  On completion of the course, participants will be provided with Certificates which will enable them to demonstrate they are compliant with the requirements of the Act.

## PET Fund Project Budget Jan - Dec 2014

All figures are GST exclusive

	2014 Budget	2014 Notes
<b>Income</b>		
TUEF Grant Money	\$1,088,235	2 x 6 month draw down of \$544,117.65, allocated for accounting purposes. This is greater than \$1 million pa. as the Grant was not fully utilised during the Jun 2012 - Dec 2013 Scoping and Research Phase 1 of the project. \$9.25m remains to be allocated from Jan 2014 - Jun 2022.
Interest Received	\$300,000	Projected interest on term deposits.
<b>Education Income</b>		
Total Scheduled Training	\$103,040	Assumes delivery of 23 courses based on 70% delivery target (33 courses x 0.7 ). Excludes online training.
Non Scheduled Training	\$5,850	Assumes 9 days of non-scheduled training (Union Governance)
Online Training	\$4,250	Assumes 50 participants in Union Governance Online in 2014.
<b>Total Education Income</b>	<b>\$113,140</b>	
Reimbursements	\$14,000	Includes reimbursements for Education Expenses and for a proportion of WA Global Expenses.
<b>TOTAL INCOME</b>	<b>\$1,515,375</b>	
<b>Expenses</b>		
<b>Education Expenses (other than staffing costs)</b>		
Training Expenses	\$9,000	Anticipated scheduled and non-scheduled training expenses.
Online Training	\$5,100	Proportion of maintenance and delivery costs for online learning system.
<b>Total Education Expenses</b>	<b>\$14,100</b>	
<b>Administration</b>		
ACTU OECC Overhead Fees	\$65,640	Proportion of overhead fees. Based on distribution of EFT between NWEF, PET and ACTU. Invoiced quarterly. Includes IT costs, Office Equipment leases, Office Supplies and Stationery, Postage, Insurances, Printing, Photocopying and Marketing Materials.
Occupancy Costs - SA, VIC, NSW, WA	\$29,200	Lease and outgoings of office space for staff located in NSW, SA, WA & VIC. Based on distribution of EFT between NWEF, PET and OECC.
Advertising	\$0	
Audit Fees	\$5,600	Audit performed at end of financial year.
Accounting Fees	\$20,400	
Bank Charges	\$2,400	
Call Centre Surveys	\$1,500	Proportion of costs associated with Annual Evaluation Survey of PET & NWEF-funded course participants.
Contracted Services	\$0	
Equipment costs	\$4,000	
Publications	\$6,000	Proportion of costs associated with production of ACTU Course Guide, Calendar and Online Promotion.
Sundries	\$60	
Teleconferencing	\$150	
<b>Total Administration</b>	<b>\$134,950</b>	
<b>Travel &amp; Accommodation</b>	<b>\$31,500</b>	Includes costs for Air fares, Accommodation, Travel Expenses and Travel Allowances. Calculated on the basis of travel required to undertake interstate course delivery.
<b>Staffing Costs</b>	<b>\$709,493</b>	Includes salaries, oncosts and professional development for 6.1 EFT allocated for delivery of PET Fund Project in 2014.
<b>Total Expenses</b>	<b>\$890,043</b>	
<b>Net Income/expenditure</b>	<b>\$625,332</b>	

The **General Outline of Project Expenditure** provided below for the duration of the TUEF PET Fund Project differs from that provided with the previous Outline Plan for the period July - December 2013. The previous Outline of Project Expenditure was presented in financial years, as the first and only Summary Report provided at that time was for the period July 2012 - June 2013, consistent with Clause 11 of the Funding Agreement, as varied.

From 2014, also consistent with Clause 11 of the Funding Agreement, TUEF's planning and reporting cycle will be provided on a calendar basis (with 6-monthly financial reporting). The General Outline of Expenditure has consequently been revised and presented in calendar years to provide greater consistency with project plans and reports from 2014-2022.

YEAR	2012-13 <sup>≠</sup>	Jul-Dec 2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
<b>Balance at beginning of period*#</b>	\$10,000,000	\$10,189,177	\$10,230,744	\$9,767,841	\$8,517,841	\$7,267,841	\$6,017,841	\$4,817,841	\$3,617,841	\$2,417,841	\$1,217,841
<b>Plus income (including interest)<sup>^</sup></b>	\$299,878	\$186,419	\$427,140								
<b>Less Expenditure<sup>#</sup></b>	\$110,701	\$144,852	\$890,043	\$1,250,000	\$1,250,000	\$1,250,000	\$1,200,000	\$1,200,000	\$1,200,000	\$1,200,000	\$1,217,841
<b>Balance at end of period<sup>#</sup></b>	\$10,189,177	\$10,230,744	\$9,767,841	\$8,517,841	\$7,267,841	\$6,017,841	\$4,817,841	\$3,617,841	\$2,417,841	\$1,217,841	\$0

<sup>≠</sup> Represents actuals for the 2012-2013 financial year, and for Jul-Dec 2013.

\* Total Funding for the Project is \$11,000,000 inclusive of GST, as provided by Clause 3.1 of the Funding Agreement between the Commonwealth of Australia and The Union Education Foundation Ltd, as agreed 29 June 2012.

<sup>α</sup> The TUEF NWEF Funding Agreement requires completion of that Project by 30 June 2015. As stated in the Milestones and Deliverables Plan for the PET Fund Project, TUEF is committed to resourcing and delivering the NWEF project to successful completion and the early years of the PET Fund Project are focused on establishing a long-term program of education and skills development that meets the objectives of the PET Funding Agreement, for implementation from November 2014. Expenditure on Education Activities under the PET Fund project is anticipated to increase significantly from 2015.

<sup>^</sup> Clause 3.8 of the Funding Agreement provides that any interest earned by TUEF on the Funds "must be used diligently and for the sole purpose of the Project...". Interest earned to date is represented in the relevant columns. Interest that may be earned and reinvested for Project purposes in remaining years of the program cannot be calculated at this time.

<sup>#</sup> Expenditure and Balance projections are indicative only and subject to variables, including: (i) potential additional market demand for scheduled and non-scheduled courses (ii) outcomes of the current Planning and Development Phase 2 of the Project and consequent application of resources for development of new curriculum (iii) progressive delivery from 2015 of courses currently funded under the NWEF program which have been demonstrated to meet the objectives of the Project.