

Productivity Education and Training Fund (PET Fund)

The Union Education Foundation

Outline Plan

From: 1 January 2015 to 31 December 2015

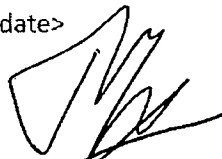
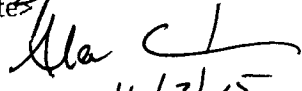
Approval of this Outline Plan		Signature and Date
The Union Education Foundation	Delegate: Tim Lyons Assistant Secretary ACTU Director, TUEF	<date> x  30/1/15
Department of Employment	Delegate: Branch Manager responsible for programme	<date> x  4/3/15

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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 2015. It establishes:

- what the project is to deliver from 1 January – 31 December 2015;
- 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 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 2014, consistent with Planning and Development Phase 2 of the Milestones and Deliverables Plan and the TUEF PET 2014 Outline Plan, TUEF curricula currently delivered with the support of either the National Workplace Education Program or the Productivity Education and Training (PET) Fund Project, was assessed for consistency with the objectives of the PET Fund Project (refer **TUEF PET Fund Summary Report Jan – Dec 2014, Attachment B – TUEF Curricula – Consistency with PET Fund Project 2014** for further detail).

TUEF notes that 2015 is the last six month period of implementation of its National Workplace Education Program (NWEF) Project, also the subject of a Funding Agreement with DoE.

In that context, this 2015 Outline Plan for the TUEF PET Fund Project proposes:

- Continued delivery of the majority of TUEF's multi-union scheduled training program with the support of the National Workplace Education Program until the end of June 2015, consistent with the **TUEF NWEF 2015 Annual Project Plan** approved by the department on 17 December 2014; and
- Increased delivery of scheduled and non-scheduled training with the support of the PET Fund Project from July 2015, including courses previously offered with the support of the NWEF Project.

TUEF acknowledges the obligation under the PET Fund Funding Agreement to create a long term program of education and skills development consistent with the objectives of the PET Fund Project.

The review of TUEF curricula has been undertaken to ensure training programs meet PET Fund Project objectives, by confirming current course objectives and content are consistent with the objectives of the Project and/or by developing additional course content to respond to the objectives of the Project, including specific content related to improving productivity in the workplace.

This approach to aligning TUEF's curricula with the objectives of the PET Fund Project recognises:

- Existing market expectations with regard to continuity of TUEF's core provision of delegate and organiser training;

- That TUEF's offering to the market is on the basis of a calendar-year training program, making a sudden transition mid-2015 to an entirely new program of courses impractical, and unlikely to retain market loyalty; and
- That the PET Fund Project expressly 'builds on the programs initiative under the National Workplace Education Program that facilitated the initial period of operation of the Fair Work Act 2009'.

In this 2015 PET Fund Outline Plan, TUEF is also proposing the curriculum review and development activities, consistent with the objectives of the PET Fund Project:

- **Review of Leadership Programs** – While TUEF's current curricula offers a wide range of courses for delegates and organisers, there is less range and flexibility in the delivery of leadership training.
- In 2015 TUEF proposes, to review its leadership training provision with a view to building a more flexible program of leadership skills courses. Please (refer to **Section 2.2 – Curriculum Review and Development Activity** below, for further detail).
- **Pilot of Indigenous Training Programs** – consistent with the objective of the PET Fund Project to deliver education and skills development that 'promotes national economic prosperity and social inclusion for all Australians', in 2015 TUEF proposes to offer two pilot training programs supporting a more inclusive enterprise bargaining approach that considers the needs of Indigenous workers, and increased participation and empowerment of Indigenous employee representatives in the workplace. (Please refer to **Section 2.2 – Curriculum Review and Development Activity** below, for further detail).

TUEF acknowledges the delivery of training programs and curriculum development proposed in this 2015 Outline Plan is subject to the department's approval of such activity as being consistent with the objectives of the PET Fund Project.

2 Deliverables

Provide a schedule of planned activities that will be undertaken from 1 January 2015 to 31 December 2015 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 programs initiative under the National Workplace Education Program (NWEF) 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 30 scheduled training courses under the PET Fund Project in 2015, excluding Online Training.

The draft 2015 TUEF PET Fund course schedule proposes delivery of the Certificate IV in Unionism and Industrial Relations (Organising Works) from January 2015. This full year course was previously offered with the support of the NWEF Project. TUEF proposes inclusion of this full year course in this PET Fund 2015 Outline Plan to avoid reporting and financial complexities that may arise through delivery of the course under the NWEF Project from January to June 2015, then under the PET Fund Project from July to December.

TUEF recognises that delivery of this course with the support of the PET Fund Project is subject to the department’s approval of such training as being consistent with the objectives of the PET Fund Project.

Please refer to **Appendix A: PET Fund Course Schedule and Course Descriptions 2015** for further detail regarding 2015 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.

Reduced demand for TUEF multi-union scheduled training and increased demand for single union non-scheduled training in 2013 and 2014, and the consequent need to retain capacity to meet market demand for single union non-scheduled training has also informed proposed offering of multi union scheduled courses in 2015.

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 31st July 2015, 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.

Online Training

From July 2015, subject to approval of this Outline Plan, the following online scheduled training courses previously delivered under the National Workplace Education Program (NWEF), will be delivered with the support of the PET Fund Project.

The Key Performance Indicators for Online Training reflect anticipated enrolment between 1 July 2015 and 31 December 2015.

- **Federal Right of Entry Laws** - This course continued to attract strong enrolment in 2014 and TUEF anticipates similar demand in 2015, reflecting requirements under the *Fair Work Act* 2009 for union officials to undertake appropriate training on the rights and responsibilities of an entry permit holder under the Act.
- **Delegates Online Education Program** - As noted in the **TUEF NWEF 8th Progress Report**, TUEF commenced delivery of the former Foundation Modules and Toolkit Modules as one consolidated Delegates Online Education Program from July 2014, reflecting a strong market preference for simultaneous enrolment in and completion of both modules. This consolidation of these online modules into one course also has the benefit of streamlining enrolment and administration processes for participants and TUEF staff.

Modest participation targets were established in the TUEF NWEF 2014 Annual Project Plan for this program due to low enrolment in previous years. There was, however, an increase in enrolment in 2014 and participation targets for the reporting period of July to December 2015 have been raised accordingly.

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 2015 TUEF has established a delivery target of 50 days of non-scheduled training, reflecting progressive implementation of the PET Fund Project in 2015.

Please refer to **Appendix A – PET Fund Course Schedule and Course Descriptions 2015** 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.

2.2 Curriculum Review and Development Activity

TUEF proposes to undertake the following curriculum review and development activities in 2015:

- **Review of Leadership Programs - Union Management Course** – In 2014, with the support of the PET Fund Project, TUEF developed and delivered a pilot series of Leadership Seminars, targeted to union officials with leadership responsibilities. While enrolment in the seminars was lower than anticipated, participant response demonstrated demand for a broader offering of leadership training opportunities.
- TUEF's education program provides a wide range of courses for delegates and organisers, but it is evident that there is less range and flexibility in the delivery of leadership training, options currently being limited to a residential course over 3 weeks, (Union Management), the 5 day Leading Campaigns course, or 1-day, topic-specific seminars.
- In 2015 TUEF proposes, in consultation with affiliates, to review its leadership training provision with a view to building a more flexible program of leadership skills courses. Consistent with this commitment the ACTU Organising Centre has recently appointed a new Director – Leadership Programs (refer section 3 – Governance below, for further detail).
- This work will commence with review of the Union Management course, with a view to developing a more accessible leadership skills course that address the skills and knowledge required of union leaders, eg organisational management skills, financial governance, knowledge of economic, workforce and productivity issues and trends, and leadership best practice.
- **Pilot - Aboriginal Cultural Awareness and Bargaining Training** – This course was developed by SAUnions, in consultation with the ACTU Aboriginal and Torres Strait Islander Education Committee, with the support of the 2014 TUEF NWEF Subcontractor Program.
- The training provides Aboriginal Cultural Awareness and Bargaining training to officials, organisers and delegates, to facilitate a more inclusive enterprise bargaining approach that considers the specific needs of Indigenous workers.
- While the course was piloted and substantially refined in 2014, SAUnions were unable to attract sufficient enrolment to deliver any further courses in 2014. While SAUnions intends to deliver the course in South Australia from 2015 within its' own resources, recognising the significant investment in the project, SAUnions has also made the course available to TUEF and the ACTU.
- Consistent with the objective of the PET Fund Project to build safe, fair and productive workplaces, in 2015 TUEF proposes to offer this training nationally, subject to demand.
- **Pilot - Indigenous Delegate Leadership Training** - This course for Indigenous delegates was developed and delivered in Western Australia in 2014, with the support of the ACTU and the TUEF WA program.
- The course seeks to facilitate increased participation and empowerment of Indigenous employee representatives in the workplace, increase unions' engagement with Indigenous workers and communities, and facilitate a greater understanding of the workplace issues facing Indigenous delegates and workers.
- Consistent with the objective of the PET Fund Project to build safe, fair and productive workplaces, in 2015 TUEF also proposes to offer this training nationally, subject to demand.
- **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 National Union Educators Conference

Every three years the ACTU Organising Centre, on behalf of TUEF, co-ordinates and hosts the National Union Educators' Conference. The previous conference was held in October 2012, with the support of the NWEF Project.

The conference is an opportunity to bring together union educators nationally, to:

- Promote TUEF's education program and training and curriculum development services;
- Deliver workshops in training skills and best practice in adult education, in the context of the workplace relations system;
- Exchange information, skills and knowledge with union educators; and
- Showcase innovative training projects, including projects delivered with the support of the TUEF NWEF Subcontractor Program 2011-2014.

Planning for the conference is currently in its early stages. TUEF and experienced union educators nationally will collaborate to develop conference themes consistent with the objectives of the PET Fund Project.

2.4 Publications / Marketing

Proposed activities for 2015 include:

- Publication of 2015 Course Guide;
- Preparation of 2016 Course Guide & Calendar;
- Update of web page and online promotion of courses;
- Development and distribution of newsletters and course promotional fliers; and
- Promotion of online education services and resources via webinars and other online education fora.

2.5 Professional Development of Staff

Staff development will be met through:

- Attending relevant training and skills development courses;
- Co-training with an experienced educator the first time they deliver a course;
- Being supported through internal coaching and mentoring; and
- All TUEF educators will attend the triennial National Union Educators Conference to be delivered by TUEF in October 2015.

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.
- Scheduled training courses are open to all unions, targeting all industries. A summary of industries reached will be included in Summary Reports.

2.7 Delivery Targets for the period are:

Key Performance Indicator	Delivery Target	Comments
Multi Union - Scheduled Training		
Number of Scheduled Training Courses Delivered.	21	Delivery target is 70% of scheduled training courses (excluding Online Training). $30 \times 0.7 = 21$
Number of participants in Scheduled Training Courses.	168	The total is based on a target of 8 participants per course for 21 courses.
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).
Online Training		
Delegates Online Education Program – Numbers of participants	Completion of course by 30 participants	Enrolment in these courses improved in 2014 and TUEF has increased the participation target accordingly.
Federal Right of Entry Laws – Numbers of participants	Completion of course by 250 participants	Completion of this course enables participants to apply for a right of entry permit under the <i>Fair Work Act 2009</i> .
Single Union - Non-Scheduled Training		
Number of Non-Scheduled Training Courses Delivered.	40	Delivery target is based on previous delivery of Non-Scheduled Training Courses under NWEF & PET Fund Projects.
Number of participants in Non-Scheduled Training Courses.	320	The total is based on a target of 8 participants per course for 40 courses.
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).
Training Participant Survey		
Number of completed Training Participant Surveys	50	The survey is conducted at the end of each year to evaluate post-training outcomes for participants, and is additional to evaluation conducted at the end of each course. Questions 4 & 5 of the survey seek to evaluate the effectiveness of training in delivering the intended productivity-related outcomes of the PET Fund Project Funding Agreement.
Participant satisfaction rating of 4 or above in response to survey Q4	60% of participants providing satisfaction rating of 4 or above	
Participant satisfaction rating of 4 or above in response to survey Q5	60% of participants providing satisfaction rating of 4 or above	

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.

Provide:

- Updated contact details of managerial or specified personnel.

Managerial and Specified Personnel	Role/Responsibilities	Contact Information
<p>Tim Lyons Assistant Secretary ACTU Director TUEF</p>	<p>Role: Project Director & Project Manager</p> <p>Responsibilities:</p> <ul style="list-style-type: none"> • Provides project oversight and direction on behalf of the TUEF Board; • Accountable to the TUEF Board for delivery of the project in accordance with the Funding Agreement; • Primary point of contact on the project and responsible for accepting notices on behalf of TUEF. <p>Note: From 24 November 2014 the TUEF Project Director has been carrying out the responsibilities of the TUEF Project Manager, pending appointment of a new Director – Organising Program for the ACTU Organising Centre.</p>	<p>ACTU Level 6, 365 Queen Street Melbourne VIC 3000</p>
<p>Vacancy Director – Organising Program ACTU Organising Centre</p> <p>This position is anticipated to be filled by end of February 2015.</p>	<p>Role: Project Manager</p> <p>Responsibilities:</p> <ul style="list-style-type: none"> • Accountable to the TUEF Board and Project Director for delivery of the project in accordance with the Funding Agreement; • Primary point of contact on the project and responsible for accepting notices on behalf of TUEF. 	<p>ACTU Organising Centre Level 4, 365 Queen Street Melbourne VIC 3000</p>

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

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"> Maintenance of appropriate financial management systems. Regular financial reporting to the Project Manager by ACTU GM, including P&L vs. Budget and Balance Sheets. Project progress reporting to the TUEF Board, including financial reporting. Accounts audited annually by an independent auditor. 	L	H	Very Good
<p>Risks associated with management of subcontractors</p> <p>Note: The risk management strategy outlined adjacent is consistent with that applied to NWEF subcontracting arrangements.</p> <p>TUEF will not be utilising any subcontractors during this period to deliver the Project.</p>	<ul style="list-style-type: none"> 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. Subcontractors must enter into a formal agreement with TUEF, which will specify requirements for progress reporting and management of funding. Ongoing monitoring of subcontracting arrangements by the Compliance and Grants Manager ACTU. Payments to subcontractors will be subject to acceptance of satisfactory progress reports in accordance with the Funding Agreement. 	L	H	Very Good
<p>Insufficient attendance at scheduled training, affecting course delivery and participation</p> <p>Note: The risk of insufficient attendance at Union Governance</p>	<ul style="list-style-type: none"> Marketing of courses using internal and external networks Allowing adequate timeframes for advertising to potential participants Course planning and review 	M	H	Good

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>to ensure quality and relevancy</p> <ul style="list-style-type: none"> • Course Evaluation Questionnaires to inform review of courses • Briefings to be held in each States for Unions and TLCs on the objectives of the project • Re-scheduling of courses with low enrolments to meet market needs 			
Staffing availability for scheduled training	<ul style="list-style-type: none"> • TUEF has allocated training resources in NSW, VIC, QLD, WA, SA, and TAS. • Training resources can be provided in other areas on demand. 	L	H	Very Good
Education content not of consistent high quality	<ul style="list-style-type: none"> • Professional development for staff • Professional mentoring for educators • Course Evaluations and Phone Survey used to review programs • Attendance at Training Skills for Union Educators / Certificate IV in Training and Assessment. 	L	H	Very Good
Staffing availability for Curriculum Development and Review	<ul style="list-style-type: none"> • Identification of tasks and commitment of required skills and expertise in ACTU Organising Centre workplan. • Identification of alternative resources in the event of unforeseen changes to workplan or staff availability. 	M	H	Good
Insufficient project scoping may lead to an underestimate of effort and complexity of project tasks, impacting project completion and/or budget.	<ul style="list-style-type: none"> • Ensure project requirements are sufficiently analysed and assessed in terms of effort, complexity, and cost. 	L	H	Good

<p>Inadequate industry coverage and inconsistent delivery across industries / geography</p>	<ul style="list-style-type: none"> • Allocated resources in NSW, VIC, QLD, WA, SA & TAS to provide training. • Trainers can be flown interstate to meet demand 	M	H	Good
<p>Emerging risk: Insufficient Project oversight and monitoring due to vacancy in Director and Assistant Director positions, ACTU Organising Centre</p>	<p>Project management procedures in place to ensure effective Project oversight include:</p> <ul style="list-style-type: none"> • From 24 November 2014 the TUEF Project Director has carried out the responsibilities of the TUEF Project Manager, • The TUEF Project Officer and Project Team will maintain and deliver existing Project reporting and monitoring procedures, in accordance with the Funding Agreement; • Existing financial management and governance systems for oversight of the Project will be maintained. • The new position of Director – Organising Team has been advertised. 	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.

6 Budget

Provide a comprehensive budget including:

- *Itemised expenditure for 1 January – 31 December 2015;*
- *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 – 2015 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.

In 2015 TUEF will also conduct an annual telephone survey of course participants under the PET Fund 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 project commitments approved by the department in annual PET Fund Project Outline Plans, and target milestones in the Milestones and Deliverables Plan 2012.

8 Submitting your Outline Plan

Please email a signed copy of the completed PET Fund Outline Plan by close of business on **31 January 2015** to: Damien Booth – Programme Manager, at the:

PET Fund Inbox - PETFund@employment.gov.au

COURSE TITLE	TARGET GROUP	NUMBER OF INSTANCES PER STATE										TOTAL
		ACT	NSW	NT	QLD	SA	TAS	VIC	WA	ONLINE		
Advocacy	Officials, Organisers and Industrial officers							1			1	
Call Centre Organising	Organisers							1			1	
Campaigning Skills for Organisers	Organisers				1						1	
#Certificate IV in WHS	WHS Specialists							1			1	
#Craft of Organising	Organisers						1	1			2	
^Delegates Online Education Program	Delegates									1	1	
Economics / Political Economy for Unionists	Officials and Organisers		1								1	
^Federal Right of Entry Laws	Officials									1	1	
Grievance Handling for Organisers	Officials and Organisers					1					1	
Introduction to Strategic Industry & Corporate Research	Researchers and Officials		1								1	
Lead Organiser Development Program - Non-Residential	Lead Organisers		1								1	
#Organising Foundations	Organising Foundations		1		1	1	1	1			5	
#Organising Works - Certificate IV in Unionism and Industrial Relations	Organisers		1					1			2	
#Training Skills for Union Educators - Certificate IV in Training and Assessment	Union Educators							1			1	
Union Governance*	Officials	1	2		1	2	1	2	2		11	
Workplace Union Leaders	Delegates					1					1	
TOTAL COURSES		1	7	0	3	5	3	9	2	2	32	

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.

Appendix A - TUEF PET Fund 2015 Course Schedule and Course Descriptions

DESCRIPTION	STATE	START DATE			END DATE		
		DAY	DATE	MONTH	DAY	DATE	MONTH
Organising Works Course 01: Induction	NSW	Thursday	29	January	Friday	30	January
Organising Works Course 01: Induction	VIC	Tuesday	3	February	Wednesday	4	February
Organising Works Course 02: History & Values	NSW	Monday	9	February	Friday	13	February
Organising Works Course 02: History & Values	VIC	Monday	9	February	Friday	13	February
Union Governance	VIC	Tuesday	24	February	Tuesday	24	February
Union Governance	TAS	Thursday	26	February	Thursday	26	February
Union Governance	SA	Thursday	26	February	Thursday	26	February
Union Governance	NSW	Friday	27	February	Friday	27	February
Union Governance	QLD	Monday	2	March	Monday	2	March
Union Governance	WA	Tuesday	10	March	Tuesday	10	March
Organising Works Course 03: Organising Foundations	NSW	Wednesday	11	March	Friday	13	March
Union Governance	ACT	Wednesday	11	March	Wednesday	11	March
Organising Works Course 03: Organising Foundations	VIC	Tuesday	17	March	Thursday	19	March
Organising Works Course 04: Planning	VIC	Monday	20	April	Thursday	23	April
Organising Works Course 04: Planning	NSW	Tuesday	21	April	Friday	24	April
Organising Works Course 05: Workplace Leaders	NSW	Wednesday	6	May	Friday	8	May
Organising Works Course 05: Workplace Leaders	VIC	Tuesday	12	May	Thursday	14	May
Delegates Online Education Program	Online	Monday	1	June	Thursday	31	December
Federal Right of Entry Laws	Online	Tuesday	2	July	Friday	32	January
Organising Works Course 06: Workplace Structure & Action	VIC	Tuesday	2	June	Thursday	4	June
Organising Works Course 06: Workplace Structure & Action	NSW	Wednesday	3	June	Friday	5	June
Craft of Organising - Part 1	VIC	Tuesday	16	June	Friday	19	June
Union Governance	SA	Wednesday	17	June	Wednesday	17	June
Training Skills for Union Educators - Certificate IV in TAA - Part 1	VIC	Tuesday	23	June	Friday	26	June
Organising Works Course 07: Communication for Organisers	VIC	Tuesday	30	June	Thursday	2	July
Organising Works Course 07: Communication for Organisers	NSW	Wednesday	1	July	Friday	3	July
Organising Foundations - Part 2	TAS	Tuesday	14	July	Wednesday	15	July
Organising Works Course 08: Power in Diversity	VIC	Tuesday	21	July	Thursday	23	July
Training Skills for Union Educators - Certificate IV in TAA - Part 2	VIC	Tuesday	21	July	Thursday	23	July
Organising Foundations - Part 1	SA	Tuesday	28	July	Thursday	30	July
Craft of Organising - Part 2	VIC	Tuesday	28	July	Friday	31	July
Organising Works Course 08: Power in Diversity	NSW	Wednesday	29	July	Friday	31	July
Organising Foundations - Part 1	NSW	Wednesday	5	August	Friday	7	August
Organising Works Course 09: Residential	NSW	Sunday	9	August	Friday	14	August
Craft of Organising - Part 1	TAS	Tuesday	11	August	Friday	14	August
Grievance Handling for Organisers	SA	Wednesday	12	August	Friday	14	August
Lead Organiser Development Program - Non-Residential	NSW	Monday	24	August	Friday	28	August
Organising Foundations - Part 1	QLD	Monday	24	August	Wednesday	26	August
Organising Foundations - Part 2	SA	Tuesday	25	August	Wednesday	26	August
Campaigning Skills for Organisers	QLD	Monday	31	August	Wednesday	2	September
Advocacy	VIC	Monday	31	August	Friday	4	September
Workplace Union Leaders	SA	Monday	7	September	Friday	11	September
Craft of Organising - Part 2	TAS	Tuesday	8	September	Friday	11	September
Organising Foundations - Part 2	NSW	Tuesday	15	September	Wednesday	16	September
Economics / Political Economy for Unionists	NSW	Tuesday	22	September	Thursday	24	September
Organising Works Course 10: Grievance Organising	NSW	Wednesday	23	September	Friday	25	September
Organising Works Course 10: Grievance Organising	VIC	Tuesday	29	September	Thursday	1	October
Union Governance	NSW	Tuesday	6	October	Tuesday	6	October
Organising Foundations - Part 1	VIC	Tuesday	6	October	Thursday	8	October
Organising Foundations - Part 2	QLD	Wednesday	7	October	Thursday	8	October
Union Governance	VIC	Friday	9	October	Friday	9	October
Union Governance	WA	Monday	19	October	Monday	19	October
Introduction to Strategic Industry & Corporate Research	NSW	Tuesday	20	October	Thursday	22	October
Organising Works Course 11: OHS Organising	VIC	Tuesday	20	October	Thursday	22	October
Organising Works Course 11: OHS Organising	NSW	Wednesday	21	October	Friday	23	October
National Union Educators' Conference	SA	Wednesday	28	October	Friday	30	October
Certificate IV in WHS - Part 1	VIC	Wednesday	4	November	Friday	6	November
Organising Works Course 12: Economics for Organisers & Review	VIC	Monday	16	November	Thursday	19	November
Call Centre Organising	VIC	Tuesday	17	November	Thursday	19	November
Organising Works Course 12: Economics for Organisers & Review	NSW	Tuesday	17	November	Friday	20	November
Organising Foundations - Part 2	VIC	Tuesday	24	November	Wednesday	24	November
Certificate IV in WHS - Part 2	VIC	Monday	7	December	Thursday	9	December

COURSE	TARGET GROUP	COURSE DESCRIPTION	HOW DOES THE COURSE MEET THE OBJECTIVES OF THE PET FUND PROJECT? (as expressed in Parts A & B of the Purpose Statement of the TUEF PET Fund Funding Agreement 2012).
Aboriginal Cultural Awareness and Bargaining Training - PILOT	Officials, Organisers, Delegates and Activists	This training provides Aboriginal Cultural Awareness and Bargaining training to officials, organisers and delegates, to facilitate a more inclusive enterprise bargaining approach that considers the specific needs of Indigenous workers.	This course develops the skills and knowledge required for participants to communicate, consult and effectively represent Indigenous employees in good faith enterprise bargaining processes, build safe, fair and productive workplaces, and contribute to the continuing successful operation of the workplace relations system.
Advanced Communication Skills (Level 2 Delegates)	Delegates and Activists	This course builds on the skills introduced in the Core Skills for Delegates and Activists course, and develops the higher level communication skills required to enable delegates to consult, communicate and organise effectively. This course covers different communication formats including one to one conversations, site meetings, mass meetings, e-bulletins, flyers, magazine articles and reports.	The training provides experienced employee representatives with the communication skills needed to engage effectively with employers and employees on matters affecting employees and the workplace, including industrial and safety issues, bargaining and negotiation processes (including matters affecting or supporting productivity), work organisation and work/life balance.
Advanced Corporate Research	Economics and Research Sp	This course is for experienced union researchers and others who have completed the Introduction to Strategic Industry and Corporate Research course or who have corporate research experience. The course builds on participants' previous research and campaign experience and enables them to explore and apply advanced research and campaigning methods, within the context of the Fair Work Act. Topics include financial analysis, shareholder activism, government regulation and inquiries, media and legal issues.	The course develops more advanced research skills that enable participants to research workforce, industry, financial, economic and corporate data and to analyse and communicate information relevant to their industry to employees and employers, with particular reference to the connections between workforce, industrial and economic data, and understanding productivity issues in the context of enterprise bargaining. This course includes specific content outlining concepts and case studies related to improving productivity in the workplace.
Advanced Educators' Course - Residential	Union Educators	This course builds on the skills and knowledge covered in the Training Skills for Union Educators / Certificate IV in Training and Assessment course, and develops advanced training techniques and skills in the design of education programs. The course is for existing union educators and trainers with responsibility for design and delivery of education programs, and who wish to know more about adult education theory and practice. It may also appeal to Lead Organisers who have a substantial training and development role. On completion of this course, participants will be able to: understand the elements of program design; understand the links between adult education and union education; identify and use informal learning opportunities for Organisers and Delegates; and practice training sessions that use active learning techniques and respond to diverse learning styles.	The course provides skills and knowledge that enable union educators to train employee representatives to carry out their roles effectively, to provide inclusive training opportunities that respond to employee representatives' diverse learning styles and capacities, and to develop employee representatives' and union officials' leadership skills.

Appendix A - TUEF PET Fund Course Schedule and Descriptions

COURSE	TARGET GROUP	COURSE DESCRIPTION	HOW DOES THE COURSE MEET THE OBJECTIVES OF THE PET FUND PROJECT? (as expressed in Parts A & B of the Purpose Statement of the TUEF PET Fund Funding Agreement 2012).
Advanced Negotiation Skills (Level 3 Organisers)	Officials, Organisers and Industrial Officers	This practical course builds on the introductory Negotiation Skills for Organisers course, to develop skills for officials who are involved in negotiating outcomes in grievances, bargaining or resolution of other disputes. The aim of the course is for participants to develop a wider range of negotiation skills and techniques, to plan effective and cooperative negotiations, and to practice and obtain feedback on these skills in the classroom.	<p>The course develops and practices skills that enable participants to engage and negotiate with employers and workers on workplace issues, including work organisation, the balance between work and life, safe, fair and productive workplaces, and the achievement of productivity outcomes in the context of enterprise bargaining.</p> <p>This course includes specific content outlining concepts and case studies related to improving productivity in the workplace.</p>
Advanced Recruitment Skills (Level 2 Organisers)	Organisers	This course develops organisers' skills in communicating with workers about joining the union, in the context of promoting good faith, collective bargaining processes and other protections under the Fair Work Act.	The training further develops participants' understanding and practice of the skills required to engage with and communicate effectively with workers regarding statutory rights with respect to union membership and the representative role of unions, particularly in the context of enterprise bargaining and the resolution of workplace issues under the Fair Work Act.
Advocacy	Officials, Organisers and Industrial Officers	This course is for Officials who will present matters in the Fair Work Commission (FWC) and State IR Tribunals and is designed as a step by step approach to researching and presenting a submission to the FWC or other jurisdictions. The course identifies the areas in which the FWC can arbitrate, and those matters that a lay advocate can take to the Magistrates Courts, both State and Federal. The course provides practical instruction in all stages of preparing and presenting a matter for hearing before an industrial tribunal, and culminates in a mock arbitration hearing before a member of the Fair Work Commission.	This course provides specialist advocacy skills, knowledge and practical training that enables participants to participate in and contribute to the arbitration and conciliation processes of the Fair Work Act and the continuing successful operation of the workplace relations system.
Bargaining under the Fair Work Act (Level 2 Organisers)	Officials, Organisers and Industrial Officers	This course provides an understanding of Fair Work Act provisions around bargaining, and explores the application of the legislation to workers and employers. It provides participants with the skills to undertake bargaining in a planned and effective manner in accordance with Good Faith Bargaining obligations, to improve employment practices and outcomes in workplaces.	<p>This course develops the specific skills and knowledge required for participants to engage with employees and employers on productivity, work organisation, the balance between work and life, and the generation and sharing of productivity gains, in order that they can participate in and contribute to good faith enterprise bargaining in the context of the Fair Work Act and contribute to the continuing successful operation of the workplace relations system.</p> <p>This course includes specific content outlining concepts and case studies related to improving productivity in the workplace.</p>

COURSE	TARGET GROUP	COURSE DESCRIPTION	HOW DOES THE COURSE MEET THE OBJECTIVES OF THE PET FUND PROJECT? (as expressed in Parts A & B of the Purpose Statement of the TUEF PET Fund Funding Agreement 2012).
Call Centre Organising	Organisers	This course is designed for staff who work in a union call centre. This is a base level course to build participants knowledge and skills in key aspects of their role - efficiently responding to phone enquires, improving communication with members, assisting in resolving grievances and disputes, and providing information about the Fair Work Act and other information relevant to the workplace.	The training provides skills that enable participants to engage with and inform employees on matters affecting their work or workplace, including work organisation, the balance between work and life, safety and fairness in the workplace, the resolution of grievances and disputes, and employees and employers rights and responsibilities within the workplace relations system.
Campaigning Skills for Delegates and Activists (Level 2 Delegates)	Delegates and Activists	This course builds on the skills introduced in the Core Skills for Delegates course and will include further skill development around building structures at workplace, for example, a delegates committee. The course will give participants practical tools and skills for effective communication of workplace issues to both employees and employers, with a focus on how to resolve issues quickly and efficiently. Participants will study examples from a range of bargaining and non-bargaining based case studies.	The course provides participants with the skills needed to effectively communicate and represent employee concerns, including practical skills to ensure workplace concerns are identified and responded to through co-operative and consultative processes, and builds leadership skills in the workplace, at the delegate level.
Campaigning Skills for Organisers (Level 2 Organisers)	Organisers	This course builds organisers' understanding of the essential steps in planning and delivering an effective campaign, usually within a bargaining context, with the objective of improving workplace relations, employment practices and workplace outcomes. It covers planning, communication, and effective workplace representation.	The course provides participants with the skills needed to effectively lead enterprise bargaining and other consultative workplace processes, developing participants' capacity to communicate and represent employee and employers concerns, to demonstrate good leadership in the workplace, and contribute to successful operation of the workplace relations system and good faith enterprise bargaining, in the context of the Fair Work Act.
Certificate IV in Unionism and Industrial Relations - Organising Works (Level 1 Organisers)	Organisers	The Organising Works program is a formal qualification course that trains new union organisers in the skills of organising, covering topics such as: knowledge of the workplace relations system and laws; bargaining and dispute resolution; consultation and communication with workers and employers; identifying and resolving issues of concern to workers; implementing and monitoring WH&S laws, policies and procedures; and understanding current economic and policy issues relevant to the workplace. The training is nationally accredited and formally assessed via a range of methods, including workplace-based projects, written activities and observation of demonstrated skills. Participants successfully completing all assessment are awarded the Certificate IV in Unionism & Industrial Relations (BSB41807) qualification, comprising 10 Units of Competency.	The program provides participants with a comprehensive understanding of the workplace relations system and their role within that system, including developing and maintaining co-operative and consultative processes in the workplace, engaging with employers and workers on workplace issues, facilitating outcomes that lead to improved fairness, safety and productivity in the workplace, particularly in the context of enterprise bargaining, and contributing to the successful operation of the workplace relations system. This course includes specific content outlining concepts and case studies related to improving productivity in the workplace.

Appendix A - TUEF PET Fund Course Schedule and Descriptions

COURSE	TARGET GROUP	COURSE DESCRIPTION	HOW DOES THE COURSE MEET THE OBJECTIVES OF THE PET FUND PROJECT? (as expressed in Parts A & B of the Purpose Statement of the TUEF PET Fund Funding Agreement 2012).
Certificate IV in Work Health and Safety	WHS Specialists	<p>The Certificate IV in Work Health and Safety (WHS) is a nationally accredited program which incorporates a proactive and preventative union approach to health and safety in the workplace.</p> <p>This course is for union trainers who deliver WHS training, union Officials and Organisers involved in WHS issues, and Health and Safety Representatives who wish to gain a formal qualification and increase their knowledge and involvement in the application of WHS legislation and policy-making in Australian workplaces. The course gives participants the skills to work effectively and co-operatively on consultative committees with employers and to build co-operative workplace relations at the enterprise level.</p>	The course provides detailed skills and knowledge enabling participants to effectively communicate and consult with employers and employees on matters of Work Health and Safety and to provide leadership in building safer, fairer and more productive workplaces.
Commonwealth Work Health and Safety Entry Permit Holders	Officials and Organisers	Completion of this accredited course enables officials and organisers to apply for an entry permit under the Work Health and Safety Act 2011 (Cwth).	The course provides the knowledge required for participants to understand their obligations under the Work Health and Safety Act, equipping them to effectively communicate and consult with employers and employees on matters of WHS, to provide leadership in building safer, fairer and more productive workplaces, and contribute to the continuing successful operation of the workplace relations system.
Core Skills for Delegates and Activists (Level 1 Delegates)	Delegates and Activists	This is a course for new employee representatives and gives them the skills and knowledge to become an effective workplace representative. It builds skills in representing workers, communicating with workers and employers and promoting cooperative workplace relations.	The course provides participants with the basic skills required to consult and communicate with employees and employers on workplace issues, including work organisation, the balance between work and life, and the maintenance of safe, fair and productive workplaces.
Craft of Organising	Organisers	The Craft of Organising course is a 2-part program for experienced organisers that further develops participants' skills and knowledge in organising theory and practice, in the context of the current workplace relations system. The course has a particular focus on development of effective approaches to enterprise bargaining, communication plans for consultative engagement with workers and employers, campaigning around and resolving issues of concern to workers, and the development of workplace delegates.	The program provides participants with an opportunity to update their knowledge of current theory and practice with respect to the role of an organiser, in the context of developing and maintaining co-operative and consultative processes in the workplace, engaging with employers and workers on workplace issues, facilitating outcomes that lead to improved fairness, safety and productivity in the workplace, particularly in the context of enterprise bargaining, and contributing to the successful operation of the workplace relations system.
Delegates Online Education Program	Delegates and Activists	This program is an online version of the Core Skills for Delegates course. It is aimed at new workplace representatives and aims to give them the skills and knowledge to become an effective workplace representative. The course covers the history and role of unions, the role of delegates, mapping the workplace, communication skills (including questioning and listening skills) and problem solving.	The course provides participants with the basic skills required to consult and communicate with employees and employers on workplace issues, including work organisation, the balance between work and life, and the maintenance of safe, fair and productive workplaces.

Appendix A - TUEF PET Fund Course Schedule and Descriptions

COURSE	TARGET GROUP	COURSE DESCRIPTION	HOW DOES THE COURSE MEET THE OBJECTIVES OF THE PET FUND PROJECT? (as expressed in Parts A & B of the Purpose Statement of the TUEF PET Fund Funding Agreement 2012).
Developing Workplace Leaders (Level 2 Organisers)	Organisers	This course is designed to build organisers' knowledge and skills in the application of adult learning, to enable development of their workplace delegates in both formal and informal education settings. It encourages a planned approach to working with delegates, to assess their learning needs and to build their confidence, skills and knowledge, and promotes a whole-of-union approach to delegate training and development.	The course provides participants with the skills and knowledge needed to train and develop employee representatives as effective leaders in the workplace.
Economics / Political Economy for Unionists	Officials and Organisers	This course gives officials and organisers a basic overview of economics to assist in bargaining, industry and corporate analysis, and to improve outcomes and productivity for employees and employers. The course introduces economic ideas in plain language, and applies them in case studies. Topics include economics and union values, productivity and growth, labour markets, inflation, unemployment, banking, the role of government, and global financial crises.	<p>This course presents current economic theories and analyses their application to the workplace, enabling participants to engage with employers and workers on productivity issues and to progress productivity outcomes in the context of enterprise bargaining.</p> <p>This course includes specific content outlining concepts and case studies related to improving productivity in the workplace.</p>
Experienced Organiser Program - PILOT (Incorporating Certificate IV in Unionism and Industrial Relations)	Organisers	<p>This program enables experienced organisers to gain the nationally accredited qualification BSB41807 Certificate IV in Unionism and Industrial Relations, through a flexibly delivered and accessible training program.</p> <p>The course builds on participants' 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, and working with employers in the current workplace relations system.</p> <p>The program comprises classroom-based group workshops, as well as visits by a qualified educator to participants in their workplace to reinforce and individualise the learning, and to gather assessment evidence</p>	The program updates participants with understanding of the workplace relations system and their role within that system, including developing and maintaining co-operative and consultative processes in the workplace, engaging with employers and workers on workplace issues, facilitating outcomes that lead to improved fairness, safety and productivity in the workplace, particularly in the context of enterprise bargaining, and contributing to the successful operation of the workplace relations system.
Fair Work Update (Level 2 Organisers)	Officials and Organisers	This course provides organisers and union officials with up to date information about developments around the Fair Work Act, including recent case law around bargaining, activities of the Fair Work Ombudsmen and the Fair Work Commission.	This course is made available in the event of significant amendment to the Fair Work Act, and subject to demand, providing employee representatives with current information on changes to and operation of the workplace relations system.

Appendix A - TUEF PET Fund Course Schedule and Descriptions

COURSE	TARGET GROUP	COURSE DESCRIPTION	HOW DOES THE COURSE MEET THE OBJECTIVES OF THE PET FUND PROJECT? (as expressed in Parts A & B of the Purpose Statement of the TUEF PET Fund Funding Agreement 2012).
Federal Right of Entry Laws	Officials	<p>The Fair Work Act of 2009 brought about important changes to workplace laws, particularly in relation to union officials' entry to workplaces. Completion of this course enables officials to apply for a right of entry permit under the Fair Work Act.</p> <p>This Fair Work Commission-approved online course focuses on the requirements of the Act with respect to entry to workplaces, and requires completion of a multiple choice quiz to test participants' understanding of their rights and responsibilities.</p>	The course provides participants with statutorily-required knowledge, enabling participants to engage appropriately with employees and employers on workplace issues at work sites, and to contribute to the continuing successful operation of the workplace relations system.
Grievance Handling for Organisers (Level 2 Organisers)	Officials and Organisers	This course builds on the skills introduced in our entry level 'Handling Grievances in the Workplace' course and further develops skills for problem solving and negotiating outcomes at the workplace level. The skills learned aim to improve employment practices and workplace outcomes for both employers and employees.	The course provides skills that enable participants to engage with employers and workers to resolve grievances and disputes related to work organisation, the balance between work and life, safety, fairness and productivity in the workplace.
Handling Grievances in the Workplace (Level 2 Delegates)	Delegates and Activists	This course builds on the skills introduced in our Core skills for Delegates course and includes skills for problem solving and negotiating outcomes at the workplace level. The course addresses the principles of procedural fairness, develops problem-solving and analytical skills, and develops strategies for communicating with workers and employers on grievance issues and procedures. The course also looks at legal principles and interpreting grievance procedure clauses in awards and agreements .	The course provides skills that enable participants to engage with employers and workers to resolve grievances and disputes related to work organisation, the balance between work and life, safety, fairness and productivity in the workplace.
Indigenous Delegate Leadership Training - PILOT (Level 1 Delegates)	Delegates and Activists	<p>This 5-day program for Indigenous delegates seeks to facilitate increased participation and empowerment of Indigenous employee representatives in the workplace, increase unions' engagement with Indigenous workers and communities, and facilitate a greater understanding of the workplace issues facing Indigenous delegates and workers.</p> <p>The program addresses a range of topics, including the history and purpose of unions, the sources of workers rights, the role of delegates, solving problems in the workplace, and leadership skills. Participants may also undertake research on Aboriginal and Torres Strait Islander representation and engagement within the union movement.</p>	This tailored course provides Indigenous delegates with skills and knowledge to operate effectively as employee representatives, build safe, fair and productive workplaces, and to develop workplace leadership skills within an Indigenous cultural framework.
Interactive and Social Media Skills (Level 2 Organisers)	Officials and Organisers	This course builds skills to increase the effectiveness of communications between officials and workers, to facilitate more inclusive decision-making and representation in workplaces. The course reviews the multiple communication platforms and formats available to organisers, including one to one conversations, site meetings, mass meetings, e-bulletins, social media, flyers, and magazine articles.	The course provides specific communication skills that enable participants to develop and maintain effective and inclusive consultative processes in the workplace and across their industry sectors.

COURSE	TARGET GROUP	COURSE DESCRIPTION	HOW DOES THE COURSE MEET THE OBJECTIVES OF THE PET FUND PROJECT? (as expressed in Parts A & B of the Purpose Statement of the TUEF PET Fund Funding Agreement 2012).
Introduction to Strategic Industry and Corporate Research	Researchers and Officials	This course introduces skills in industry and corporate research, primarily for new union researchers. These skills are important in underpinning effective bargaining campaigns and will assist in reaching outcomes that are aimed at improving the effectiveness and productivity of organisations. The course uses case studies to introduce participants to strategic industry and corporate research plans, methods, tools and sources of information, including economic and financial reports.	<p>The course provides skills and knowledge that enable participants to research workforce, industry, financial, economic and corporate data and to analyse and communicate information relevant to their industry to employees and employers, with particular reference to the connections between workforce, industrial and economic data, and understanding productivity issues in the context of enterprise bargaining.</p> <p>This course includes specific content outlining concepts and case studies related to improving productivity in the workplace.</p>
Labour Productivity and the Fair Work Act <i>[formerly Productivity for Unions]</i>	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.	<p>These seminars are scheduled in response to demand and assist participants to understand concepts of productivity in the contexts of enterprise bargaining, the Fair Work Act and the operation of the workplace relations system.</p> <p>This course includes specific content outlining concepts and case studies related to improving productivity in the workplace.</p>
Lead Organiser Development Program - Residential and Non-Residential (Level 4 Organisers)	Lead Organisers	The Lead Organiser Development Program aims to build the skills of organisers who supervise other organising staff. It develops skills in planning, staff professional development, and systems of supervision and management. The course aims to build effectiveness and accountability in organisers, assist in building good corporate governance in unions, and to promote professional practice in representational work. The duration and delivery of the program can be tailored to unions and participants professional development needs.	The course provides skills and knowledge that enable participants to develop their leadership skills and improve their capacity to engage with employees and employers in support of the continuing successful operation of the workplace relations system.
Leadership Seminars	Senior Officials	Seminars for union leaders and senior officials, presenting current issues and trends in economic policy, theories of productivity, workplace relations, and leadership skills and practice.	<p>These seminars are scheduled in response to demand and canvass current issues of relevance to union leadership, including attributes of good leadership and governance, significant economic and industrial policy issues, and changes to industrial laws, within the context of the continuing successful operation of the workplace relations system.</p> <p>This seminar includes specific content outlining concepts and case studies related to improving productivity in the workplace.</p>

Appendix A - TUEF PET Fund Course Schedule and Descriptions

COURSE	TARGET GROUP	COURSE DESCRIPTION	HOW DOES THE COURSE MEET THE OBJECTIVES OF THE PET FUND PROJECT? (as expressed in Parts A & B of the Purpose Statement of the TUEF PET Fund Funding Agreement 2012).
Leading Campaigns (Level 4 Organisers)	Lead Organisers	This course is for union organisers and officials who have the role of leading union campaigns in the workplace/industry. It builds skills and knowledge of the essential steps in planning and delivering an effective campaign, usually within a bargaining context, with the objective of improving workplace relations, employment practices, and workplace outcomes. It covers planning, leadership, communication, strategy, and building workplace representation and involvement in the campaign.	The course provides experienced organisers with the skills needed to effectively lead larger scale sectoral or industry-wide enterprise bargaining processes, developing participants' capacity to communicate and represent employee and employers concerns, to demonstrate good leadership in the workplace, and contribute to successful operation of the workplace relations system and good faith enterprise bargaining, in the context of the Fair Work Act.
Level 2 Delegates <i>[for NT only]</i>	Delegates and Activists	Level 2 Delegates training in the Northern Territory is a tailored package which builds on the Core Skills for Delegates course, combining aspects of several Level 2 Delegates organising, bargaining and campaigning skills modules specific to the identified learning needs of workplace representatives in the Territory.	This tailored course for delegates in the NT provides skills and knowledge that enable participants to develop and maintain co-operative and consultative processes in the workplace, engage with and inform employees on matters affecting their work or workplace, including work organisation, the balance between work and life, safety and fairness in the workplace, the resolution of grievances and disputes, and employees and employers rights and responsibilities within the workplace relations system.
Media Skills for Union Officials	Officials and Organisers	This course builds the skills of union officials in dealing with the media, to enhance their ability to communicate clearly and achieve effective outcomes for workplaces, particularly in the context of bargaining and dispute resolution.	The training equips senior officials and organisers with the skills required to engage with and inform employees, employers and the general community on matters affecting the workplace relations system, via the media.
Negotiation Skills for Delegates (Level 2 Delegates) <i>[formerly Negotiation Skills for Bargaining]</i>	Delegates and Activists	<p>This course builds on the skills introduced in the Core Skills for Delegates course. It is aimed at delegates who are involved in negotiations for an Enterprise Agreement. It will give them the skills to bargain cooperatively and to reach agreements that improve outcomes for employers and employees.</p> <p>This course is intended to prepare workplace Delegates or Activists who will be acting as bargaining Representatives to take part in collective bargaining negotiations. The course will cover the key phases of bargaining and the legal triggers, rights and obligations for unions and bargaining. The course will address negotiation theory and take a practical approach to developing negotiation skills for Delegates in a collective, good faith bargaining context.</p> <p>The course can be run as a stand-alone module course or in conjunction with another Level 2 course, and would ideally be run for Delegates after the development and endorsement of the log of claims, but prior to the commencement of bargaining.</p>	The course develops and practices skills that enable participants to engage and negotiate with employers and workers on workplace issues, including work organisation, the balance between work and life, safe, fair and productive workplaces, and the achievement of productivity outcomes in the context of enterprise bargaining.

COURSE	TARGET GROUP	COURSE DESCRIPTION	HOW DOES THE COURSE MEET THE OBJECTIVES OF THE PET FUND PROJECT? (as expressed in Parts A & B of the Purpose Statement of the TUEF PET Fund Funding Agreement 2012).
Negotiation Skills for Organisers (Level 2 Organisers)	Officials and Organisers	This course builds skills for experienced organisers and officials who are involved in negotiating outcomes in grievances, disputes or bargaining. The course builds listening and negotiating skills, introduces negotiating theories, and assists participants to identify effective methods of planning and evaluating negotiations, to achieve a more cooperative approach to improving outcomes for all parties.	The course provides skills and knowledge that enable participants to engage and negotiate with employers and workers on workplace issues, including work organisation, the balance between work and life, safe, fair and productive workplaces, and the achievement of productivity outcomes in the context of enterprise bargaining.
WHS for Delegates (Level 2 Delegates) <i>[formerly OHS for Delegates]</i>	Delegates, Activists and Workers	This course will provides delegates with an overview of the Work Health and Safety (WHS) legislation, with particular focus on the consultation and risk management process. This course also gives the delegates the skills to set up the Health and Safety structures with their workplace e.g. the establishment of work groups, election of Health and Safety Representatives (HSRs) and Safety Committees to ensure WHS issues and grievances are effectively dealt with. The course also explores how delegates can work with HSRs (who are not required to be union members) to provide an integrated approach to the resolution of WHS issues. The course can be delivered as either a one or two day course. The two day course will in addition cover the area of workers compensation and return to work.	The course provides detailed skills and knowledge enabling participants to effectively communicate and consult with employers and employees on matters of Work Health and Safety and to provide leadership in building safer, fairer and more productive workplaces.
Organiser Development <i>[for NT only]</i> (Level 2 Organisers)	Organisers	This 3-day intensive training is designed specifically for Organisers in the Northern Territory. It combines sessions from other Level 2 Organiser courses including: Advanced Recruitment, Bargaining Under the Fair Work Act, Organising for Safer Workplaces and Grievance Handling. Course content is tailored to address experience and skills development requirements in the region.	This tailored course for experienced delegates in the NT provides skills and knowledge that enable participants to develop and maintain co-operative and consultative processes in the workplace, engage with and inform employees on matters affecting their work or workplace, including work organisation, the balance between work and life, safety and fairness in the workplace, the resolution of grievances and disputes and to contribute to successful operation of the workplace relations system.
Organising and Bargaining for Delegates (Level 2 Delegates)	Delegates and Activists	This course builds on the skills introduced in the Core Skills for Delegates course. It is aimed at delegates who are involved in bargaining in their workplace and will give them the skills to build effective communication and involvement in bargaining in the workplace, and to ensure they are fairly representing their members in the process.	This course for experienced delegates develops the specific skills and knowledge required to engage with employees and employers on productivity, work organisation, the balance between work and life, and the generation and sharing of productivity gains, in order that they can participate in and contribute to good faith enterprise bargaining in the context of their workplace and the requirements of the Fair Work Act.

Appendix A - TUEF PET Fund Course Schedule and Descriptions

COURSE	TARGET GROUP	COURSE DESCRIPTION	HOW DOES THE COURSE MEET THE OBJECTIVES OF THE PET FUND PROJECT? (as expressed in Parts A & B of the Purpose Statement of the TUEF PET Fund Funding Agreement 2012).
Organising for Safer Workplaces (Level 2 Organisers)	Organisers	<p>This course provides Organisers and Officials with the skills and knowledge to effectively communicate, organise and provide leadership on Work Health & Safety (WHS) issues in Australian workplaces.</p> <p>The course covers the main WHS legislative and policy frameworks operating in Australia; an understanding of how unions have traditionally organised around WHS issues; an understanding of how legislation can assist in establishing health and safety structures and decision-making processes; and how to communicate and consult effectively with workers and employers around WHS issues</p>	The course provides experienced organisers with more advanced skills and knowledge required to effectively communicate and consult with employers and employees on matters of Work Health and Safety and to provide leadership in building safer, fairer and more productive workplaces.
Organising Foundations (Level 1 Organisers)	Organisers	This is a base level course for new organisers to build their knowledge and skills in key aspects of their role – planning, dealing with grievances and disputes, identifying and developing workplace representatives, communication skills, industrial law and recruiting.	This course provides new organisers with the basic skills and knowledge required to carry out their role and responsibilities, including developing and maintaining co-operative and consultative processes in the workplace, engaging with employers and workers on workplace issues, facilitating outcomes that lead to improved fairness, safety and productivity in the workplace, particularly in the context of enterprise bargaining, and contributing to the successful operation of the workplace relations system.
Public Speaking Skills (Level 2 Organisers)	Organisers	A one day public speaking / communications workshop building understanding of the different methods of communication and skills in using them effectively. This will improve communication between officials and workers and allow for more considered and inclusive decision making and representation in workplaces.	This practical workshop provides organisers with the public speaking skills required to clearly and effectively communicate with employees and employers on matters affecting the workplace relations system, and to develop and maintain inclusive and consultative processes in the workplace.
Recruiting at Inductions (Level 2 Organisers)	Organisers and Delegates	<p>This course builds skills for organisers and workplace representatives in talking to new workers about the union at workplace inductions, where the employer has invited the union to address new employees in order to inform them of the role of unions in the workplace and in bargaining.</p> <p>This course gives participants skills in providing clear and relevant information about employee entitlements under the Fair Work Act, answering questions raised; and in recruiting people to the union. The right to join a union is an international right protected by ILO conventions, is important in promoting fairness and representation and is protected under the Fair Work Act. Union representatives undertaking this role is supported by employers as part of building more cooperative workplace relations.</p>	This training provides organisers and delegates with the knowledge and skills required to undertake co-operative and consultative processes in the workplace, engage with employers and employees, and to contribute to successful operation of the workplace relations system in the context of the Fair Work Act.

COURSE	TARGET GROUP	COURSE DESCRIPTION	HOW DOES THE COURSE MEET THE OBJECTIVES OF THE PET FUND PROJECT? (as expressed in Parts A & B of the Purpose Statement of the TUEF PET Fund Funding Agreement 2012).
Training Skills for Union Educators, incorporating Certificate IV in Training and Assessment	Union Educators	<p>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.</p> <p>Participants may also choose to undertake two additional Learning Guides and complete assessments to achieve the accredited Certificate IV in Training and Assessment qualification.</p>	The course provides skills and knowledge that enable union educators to train employee representatives to carry out their roles effectively, to provide inclusive training opportunities that respond to employee representatives' diverse learning styles and capacities, and to develop employee representatives' and union officials' leadership skills.
Union Governance	Officials	<p>The Fair Work (Registered Organisations) Act 2009 requires union officers with financial decision-making responsibilities (including elected officials, finance staff and members of committees of management) to undertake Fair Work Commission-approved training in the area of financial governance within 6 months of their appointment.</p> <p>The course has four main topics, addressing: the financial governance requirements of the legislation; conflict of interest and disclosure of financial interests; financial management issues, and; reading and understanding financial reports. 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.</p>	The course provides union officials and staff with an understanding of their financial and governance responsibilities, contribute to good leadership in workplaces and the continuing successful operation of the workplace relations system and the Fair Work Act.
Union Governance Train the Trainer	Union Educators	<p>The Fair Work (Registered Organisations) Act 2009 requires union officers with financial decision-making responsibilities (including elected officials, finance staff and members of committees of management) to undertake Fair Work Commission-approved training in the area of financial governance within 6 months of their appointment.</p> <p>The course has four main topics, addressing: the financial governance requirements of the legislation; conflict of interest and disclosure of financial interests; financial management issues, and; reading and understanding financial reports.</p> <p>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.</p>	The course builds the capacity of union educators to deliver training to union officials and staff that provides an understanding of their financial and governance responsibilities, contributes to good leadership in workplaces and to the continuing successful operation of the workplace relations system and the Fair Work Act.

Appendix A - TUEF PET Fund Course Schedule and Descriptions

COURSE	TARGET GROUP	COURSE DESCRIPTION	HOW DOES THE COURSE MEET THE OBJECTIVES OF THE PET FUND PROJECT? (as expressed in Parts A & B of the Purpose Statement of the TUEF PET Fund Funding Agreement 2012).
Union Management - Residential	Senior Officials	<p>The Union Management program is designed for union leaders with responsibility for the management of their union at federal or state level.</p> <p>This comprehensive 3-week leadership program provides participants with the analytical, strategic, financial, governance, managerial and communication knowledge and tools needed to lead their unions effectively, and an opportunity to share experiences, and engage with and learn from key industrial and social leaders and academics in a reflective, educational environment.</p>	<p>The course provides union leaders with the opportunity to acquire and develop their leadership skills, to understand the importance of leadership in building, safe, fair and productive workplaces, to demonstrate and apply good leadership in the workplace and the union movement, and to contribute to the continuing successful operation of the workplace relations system.</p>
Working for Unions	Non Industrial Union Staff	<p>This course gives new union staff an understanding of the role of unions in society, the industrial framework they operate under and their role within that framework. This promotes better corporate performance and accountability in unions, consistent with good corporate governance and statutory requirements.</p>	<p>This introductory course provides union staff with an understanding of the roles and responsibilities of unions, in the context of the continuing successful operation of the workplace relations system and the Fair Work Act.</p>
Workplace Bullying and Harassment	Officials and Organisers	<p>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.</p>	<p>The course provides detailed skills and knowledge enabling participants to effectively communicate and consult with employers and employees on matters of Work Health and Safety and to provide leadership in building safer, fairer and more productive workplaces.</p>
Workplace Union Leaders (Level 3 Delegates)	Delegates and Activists	<p>A course for experienced workplace representatives that builds on their leadership skills in working with members and employers. It covers advanced communication skills, industrial laws, dispute resolution, negotiation skills, and building workplace structures to effectively represent workers.</p>	<p>The course provides experienced delegates with skills and knowledge to develop their leadership skills and improve their capacity to engage with employees and employers in support of the continuing successful operation of the workplace relations system.</p>

Draft Budget - TUEF Productivity Education and Training (PET) Fund Project - Jan to Dec 2015

All figures are GST exclusive

	2015 Budget	Notes
Income		
TUEF Grant Money	\$1,088,235	Annualised draw down of PET Fund Grant Monies, allocated for accounting purposes. The amount is greater than \$1 million pa. as Grant Monies were not fully utilised during the Jan 2012 - Dec 2013 Scoping and Research Phase of the Project.
Interest Received	\$300,000	Projected interest on term deposits.
Education Income		
Scheduled Training	\$138,680	Income projected is based on achieving delivery of 28 courses, with minimum 8 participants per course (excluding Organising Works and Online Training, for which income and expenses are shown separately below).
Non Scheduled Training	\$48,488	Income projected is based on achieving 80% delivery of 50 training days of non-scheduled trainings, with minimum 8 participants per course.
Online Training	\$27,800	Delivery of Delegates Online Education Program and Federal Right of Entry course to participants enrolled between Jul - Dec 2015.
Organising Works Program	\$72,800	Course fees for 16 participants at \$4,550 per person in 2015. Expressions of Interest at 30 January 2015 indicate delivery will commence in 2 states (NSW & VIC).
Union Management Course - Residential	\$78,930	Note: This is provision only, subject to the outcomes of the review of the Union Management course in 2015 (refer Part 2.2 TUEF PET Fund 2015 Outline Plan). Projected income consists of residential fees of \$1,431 x 10 pax x 3 weeks = \$42,930 + course fees of \$3,600 x 10 pax = \$36,000.
National Union Educators Conference	\$66,750	Triennial National Union Educators Conference scheduled in October 2015. Assumes 100 registrations @ \$660 pp for conference & dinner + \$750 from registration processing fees (based on previous attendance).
Total Education Income	\$433,448	
Reimbursements	\$27,000	Includes reimbursements for Education Expenses and for a proportion of WA Global Expenses.
TOTAL INCOME	\$1,848,683	
Expenses		
Education Expenses (other than staffing costs)		
Scheduled Training Expenses	\$15,000	Anticipated training expenses (other than travel)
Online Training Expenses	\$1,100	Maintenance and Delivery Costs for Online Learning System (July to Dec 2015).
Organising Works Program Expenses	\$35,000	Course residential & travel expenses for participants and educators. Expressions of Interest at 30 January 2015 indicate delivery will commence in 2 states (NSW & VIC).
Union Management	\$58,716	Provision only, subject to review and scheduling of the Union Management course in 2015. Projected expenses reflect travel and accommodation costs for 3-week residential course for a minimum 10 participants + 2 trainers. (12 pax x \$1,431 residential costs x 3 weeks = \$51,516; \$1,200 x 3 weeks participant bus transfer from airport to residential = \$3,600; \$1,200 x 3 weeks provision for guest speaker and educator ground travel = \$3,600).
National Union Educators Conference	\$75,000	Projected expenses, based on cost of delivery of 2012 Conference, excluding Travel and Accommodation costs for TUEF Educators attending for Professional Development plus admin staff attending to assist in conference coordination. At the time of writing the estimated cost for such Travel & Accommodation is \$19,160.
Total Education Expenses	\$184,816	
Administration		
ACTU OECC Overhead Fees	\$130,000	Proportion of overhead fees. Based on distribution of EFT between NWEF, PET and OECC. 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	\$74,000	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	\$750	
Audit Fees	\$5,600	Audit performed at end of financial year.
Accounting Fees	\$20,400	
Bank Charges	\$2,400	
Call Centre Surveys	\$1,500	Annual Evaluation Survey of PET-funded course participants.
Contracted Services	\$1,000	
Equipment costs	\$10,000	
Marketing Materials / Publications	\$15,000	Production of ACTU Course Guide, Calendar and Online Promotion.
Sundries	\$500	
Teleconference	\$150	
Total Administration	\$261,300	
Travel & Accommodation	\$85,000	Includes costs for Airfares, Accommodation, Travel Expenses and Travel Allowances to undertake interstate course delivery and for educator meetings required for curriculum review and development.
Staffing Costs	\$1,232,768	Includes salaries, oncosts and professional development for 5.5 EFT allocated to delivery of the TUEF PET Fund Project Jan - Jun 2015, and 15 EFT allocated to delivery of the TUEF PET Fund Project Jul - Dec 2015.
Total Expenses	\$1,763,884	
Net Income/expenditure	\$84,799	

From 2014, consistent with Clause 11 of the Funding Agreement, TUEF's planning and reporting cycle for the PET Fund Project were provided on a calendar year basis (with 6-monthly financial reporting).

The General Outline of Expenditure for future years of the project is therefore presented in calendar years to provide greater consistency with annual TUEF PET Fund Outline Plans and budgets.

However, TUEF's audited Annual Financial Statements are prepared and submitted to the department and other corporate reporting entities on a financial year basis. To enable accurate comparison with audited financial statements, reporting of income, expenditure and balances for completed and audited financial years are displayed in financial years.

TUEF would welcome the department's advice on preferred presentation of this information.

YEAR	2012-2013 [≠]	2013-2014 [≠]	Jul - Dec 2014 ^α	2015	2016	2017	2018	2019	2020	2021	2022
Balance at beginning of period*[#]	\$10,000,000	\$10,189,186	\$10,122,454	\$10,061,600	\$9,058,164	\$7,784,618	\$6,479,233	\$5,141,214	\$3,769,744	\$2,363,988	\$923,088
Plus income (including interest)[^]	\$299,887	\$386,074	\$161,300	\$300,000	\$226,454	\$194,615	\$161,981	\$128,530	\$94,244	\$59,100	\$23,077
Less Net Expenditure[#]	\$110,701	\$452,806	\$222,155	\$1,303,436	\$1,500,000	\$1,500,000	\$1,500,000	\$1,500,000	\$1,500,000	\$1,500,000	\$946,165
Balance at end of period[#]	\$10,189,186	\$10,122,454	\$10,061,600	\$9,058,164	\$7,784,618	\$6,479,233	\$5,141,214	\$3,769,744	\$2,363,988	\$923,088	\$0

[≠] Represents actuals for the 2012-2013 and 2013-2014 financial years, post-audit.

^α Represents recorded income and expenditure for the July to December 2014 period, pre-audit.

* 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.

[^] 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 can only be estimated at this time.

[#] Net Expenditure after income reinvested and Balance projections are indicative only and subject to variables, including market demand for scheduled and non-scheduled courses.