

Productivity Education and Training Fund (PET Fund)

The Union Education Foundation

Outline Plan

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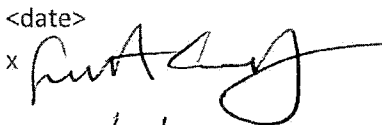
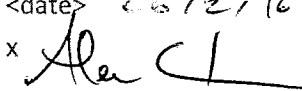
Approval of this Outline Plan		Signature and Date
The Union Education Foundation	Delegate: Scott Connolly Assistant Secretary ACTU Director, TUEF	<date> x  27/1/16
Department of Employment	Delegate: Branch Manager responsible for programme	<date> 26/2/16 x 

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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 2016. It establishes:

- what the project is to deliver from 1 January – 31 December 2016;
- 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.

2 Deliverables

Provide a schedule of planned activities that will be undertaken from 1 January 2016 to 31 December 2016 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 (NWEP) 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.

2016 is the first 12-month period of full implementation of the TUEF PET Fund Project following conclusion of the TUEF National Workplace Education Program in June 2015, also the subject of a Funding Agreement with the department.

Consequently this Outline Plan for the TUEF PET Fund Project includes increased delivery of scheduled and non-scheduled training, compared to previous years.

Multi Union - Scheduled Training

At the time of writing TUEF proposes to offer 50 multi-union scheduled training courses under the PET Fund Project in 2016, excluding Online Training.

This is consistent with scheduled training offered and delivered in 2015, when 50 multi-union training courses were also offered under the combined TUEF NWEF and PET Fund Project schedules.

The course schedule necessarily responds to market demand and a range of dates and courses is offered to the market to attract enrolment, understanding that some courses may be rescheduled, combined or cancelled in response to market demand.

TUEF notes that a Federal election will be scheduled in 2016, which may affect demand and require rescheduling of courses following announcement of an election date.

Subject to demand, TUEF may also schedule additional multi-union courses. Any additional activity will be reported as part of summary reporting.

TUEF will provide DoE with an updated, current PET Fund Course Schedule on 31st July 2016, 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 generally requires a minimum number of 8 participants to deliver each scheduled course. This may be waived by the Project Director if delivery of the training is deemed to be important in meeting key objectives.

Please refer to **Appendix A: TUEF PET Fund Course Schedule and Course Descriptions 2016** for further detail regarding 2016 scheduled courses by location, date and for course descriptions.

Notes:

- (i) *Leading Unions (formerly Union Management)* – the 2016 schedule includes two offerings of this course:
- Weeks 2 and 3 of the 2015 intake. Week 1 of this course was delivered in December 2015 and reported in the **TUEF PET Fund Summary Report 2015**. Weeks 2 and 3 will not be recorded as a course for reporting purposes in 2016. Participant evaluations will however be reported.
 - Weeks 1 and 2 of the 2016 intake. For reporting purposes this course will be recorded as 1 course in 2016, and associated participant data and evaluations reported. Week 3 will be delivered in early 2017, consistent with the revised structure for this course which places a greater emphasis on individual and group projects between classroom training (please refer to **Addendum to TUEF PET Fund 2015 Outline Plan**, dated 28 October 2015, for further information).
- (ii) *Certificate IV in Unionism and Industrial Relations (Organising Works)*
- This course usually commences in February each year. In 2016 this course will be reviewed and it is anticipated delivery will commence in June 2016. Further details regarding the proposed curriculum review are provided in **section 2.2 Curriculum Review and Development Activity**.
 - TUEF will submit a revised course description and schedule for departmental approval as Addendum to this Outline Plan later in 2016, following completion of the review.

Online Training

The following online scheduled training courses will be delivered with the support of the PET Fund Project in 2016.

- **Federal Right of Entry Laws** - This course attracted greater than anticipated enrolment in 2015 (refer section 2.1 of TUEF PET Fund Summary Report 2015) and TUEF has increased 2016 enrolment targets accordingly.
- TUEF notes the Fair Work Commission commenced a review of approved Federal Right of Entry permit training in 2015. Subject to the outcome of the review, there may be a requirement to review content and/or delivery of this course. TUEF will advise the department of any proposals in this regard, as Addendum to this Outline Plan.
- **Delegates Online Education Program** – Enrolment in this course was lower than anticipated in 2015 (refer section 2.1 of TUEF PET Fund Summary Report 2015).
- While the vast majority of core skills training for delegates is delivered via classroom-based single-union training, TUEF believes it is still appropriate to offer the online course as a flexible learning option for delegates who may have difficulty attending classroom-based training, due to their regional or remote location or inability to obtain leave for training.
- A modest annual enrolment target of 60 has been established for this course in 2016, consistent with combined targets under the NWEF and PET Fund Projects in 2015.

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 2016 TUEF proposes to deliver 80 non-scheduled training courses, consistent with targets for delivery of non-scheduled courses under the combined NWEF and PET Fund projects in 2015.

Please refer to **Appendix A – PET Fund Course Schedule and Course Descriptions 2016** for further information.

As for multi-union scheduled training, TUEF requires a minimum number of 8 participants to deliver each single-union non-scheduled training course. This may be waived by the Project Director if delivery of the training is deemed to be important in meeting key objectives.

2.2 Curriculum Review and Development Activity

TUEF proposes to undertake the following curriculum review and development activities in 2016:

(i) Review of Certificate IV in Unionism and Industrial Relations (Organising Works)

- Organising Works has been the flagship program for the ACTU Organising Centre for 21 years. The objective of the nationally accredited 12-month program is to assist unions to develop trained and competent organisers, providing new organisers with skills and knowledge in:
 - Organising and recruitment;
 - 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 WHS laws, policies and procedures; and
 - Current economic and policy issues relevant to the workplace.

- The course experienced strong demand nationally between 2009 and 2013, usually attracting 50 participants per year. However, enrolment dropped in 2014 and 2015 to 15 and 24 participants respectively. As the course was last reviewed in 2008, TUEF and the ACTU Organising Centre consider it timely to review the delivery and content of the course, in consultation with ACTU affiliates.
- A curriculum review team of experienced TUEF Educators has been established, which will consider:
 - The competencies required of a contemporary union organiser, and whether the competencies as currently delivered and assessed remain appropriate;
 - Approaches for more effective promotion of the course and recruitment of participants, including recruitment of participants from culturally diverse backgrounds;
 - Delivery modes – the course is currently delivered primarily via classroom training. The review will consider opportunities to better transfer and reinforce learning from the classroom into the workplace;
 - Assessment – participants currently complete 10 written assessment projects, comprising 35 tasks, to achieve the qualification. The review will consider whether the assessment approach should be rebalanced to include more assessment of competencies and skills via workplace assessments.
- It is intended that the course review will be completed in the first half of 2016, with the 2016 intake to commence mid-year, subject to affiliate support and departmental approval.
- TUEF notes that review of the Organising Works course may require consequential update to the Experienced Organiser Program, which incorporates *Certificate IV in Unionism and Industrial Relations*.
- TUEF will submit a revised course description and schedule for departmental approval as Addendum to this Outline Plan later in 2016, following completion of the review.

(ii) *Review of Leadership Programs*

- In 2015 TUEF reviewed the Union Management course, now titled *Leading Unions*, with the support of the PET Fund Project.
- The TUEF PET Fund 2015 Outline Plan indicated that the review of the Union Management course would be the starting point for broader review of TUEF's offering of leadership training opportunities, noting that TUEF's education program provides a wide range of courses for delegates and organisers but there is less range and flexibility in the delivery of leadership training.
- In 2016 TUEF plans to continue development of a flexible program of leadership skills courses and seminars that address the skills and knowledge required of contemporary union leaders, including:
 - organisational development and strategic planning;
 - campaigning skills;
 - membership engagement and communication strategies;
 - organisational management and governance;
 - financial management and governance; and
 - staff supervision and performance management skills

(iii) *Promotion of Indigenous Curriculum*

- The pilot courses **Aboriginal Cultural Awareness and Bargaining Training** and **Indigenous Delegate Leadership Training** were included in the TUEF PET Fund course offering for the first time in 2015, following departmental approval of the 2015 Outline Plan.

- TUEF considered it unlikely there would be sufficient demand for these courses as multi-union scheduled courses, as such courses tend to be requested by organisations establishing cultural change programs or Indigenous-specific training objectives.
- These courses were therefore made available on demand. TUEF was not however approached by any unions or Trades and Labour Councils seeking delivery of the courses in 2015.
- TUEF considers it important to increase inclusion of Indigenous employee representatives and Aboriginal Cultural Awareness training in program delivery, and proposes a more active approach to promotion of these courses in 2016.
- During this reporting period TUEF Educators will work with the ACTU Indigenous Officer to create opportunities to deliver these courses. Such opportunities may include the ACTU Indigenous Officer accessing national networks to build demand for these courses, and offering training opportunities at scheduled ACTU and/or union events where Indigenous workplace issues are likely to be discussed.
- The activities of the ACTU Indigenous Officer are funded by the ACTU. PET Fund Grant Monies will only be used to develop and deliver training consistent with the objectives of the TUEF PET Fund Project and approved Outline Plans.

(iv) *Review 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.
- As indicated previously in section 2.1, in 2016 this may include review of content and delivery of Federal Right of Entry permit training, subject to any direction arising from the review of approved training being conducted by the Fair Work Commission.

2.3 Website Upgrade - Phase 2 – Enabling Online Enrolment

- In the **Addendum to TUEF PET Fund 2015 Outline Plan**, dated 28 October 2015, TUEF sought and obtained departmental approval for allocation of funding for Phase 2 of the upgrade to the Education and Training webpages of www.actu.org.au
- Phase 2 seeks to enable online enrolment in TUEF courses by participants and affiliates via an online enrolment form, on desk top and mobile devices, directly to a cloud-hosted website and database.
- The process will significantly improve the enrolment experience and streamline administration of the TUEF Education & Training programs by automating upload of participant enrolment information to the database and minimising manual data entry.
- At the time of writing, TUEF has committed \$1,140 of the total project expenditure of \$8,300 approved via the Addendum, for two monthly licence fees of \$570 excl. GST.
- The remaining \$7,160 has been included in **Appendix B – 2016 TUEF PET Fund Project Budget**, at line item 'Further Upgrade of Education & Training Webpages', to facilitate completion of the pilot project as outlined in the Addendum.
- Further provision of \$2,840 has also been made in the draft 2016 budget to allow for purchase of additional 'observer' licences, which would provide educators with non-administrative access to view enrolments and participant training history remotely. Such licences will only be purchased subject to satisfactory implementation of the booking system.
- TUEF intends to complete the project to establish online enrolment in the first half of 2016.

2.4 Publications / Marketing

Proposed activities for 2016 include:

- Publication of 2016 Wall Calendar;
- Online promotion of 2016 Multi-Union Course Schedule;
- Update of Course Guide, now published online;
- Reprint of hard-copy Course Guide, on demand;
- 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;
- Participating in curriculum review and development projects;
- Supporting educators to obtain Certificate IV qualifications in Work Health & Safety, Training and Assessment and Unionism & Industrial Relations;
- Supporting experienced educators to upgrade their Certificate IV qualifications in Work Health & Safety, Training and Assessment and Unionism & Industrial Relations to Diploma level;
- In 2016 educators will also be encouraged to undertake short professional development placements with affiliates to:
 - Shadow organisers, educators and/or officials, to update their understanding of contemporary union training and organising practices;
 - Assist affiliates to identify current and future training needs and/or develop training plans;
 - Identify affiliate training needs not currently met by the Organising Works program, as part of the review outlined in **section 2.2 Curriculum Review and Development Activity**;
 - Identify training resources and practices that could enhance the TUEF curriculum; and
 - Deliver training and/or mentoring to delegates, organisers, educators and officials.
- Any single-union training delivered during a professional development placement will be consistent with the objectives of the TUEF PET Fund Project and reported in the **2016 TUEF PET Fund Summary Report**.
- Where placements occur, educators remain under the direction of the TUEF Project Director. Professional development placement will not include activities that are the responsibility of affiliate staff or otherwise inconsistent with the objectives of the TUEF PET Fund Project.

2.6 Geographic and Industry Coverage

- TUEF has allocated resources in NSW, VIC, QLD, WA, SA and TAS.
- Scheduled training will be offered in all states and territories, except the Northern Territory where there has been insufficient demand in recent years to enable delivery of multi-union scheduled courses. TUEF will continue to offer training in the NT on demand.
- Training resources can be provided in all 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.	35	Delivery target is 70% of scheduled training courses (excluding Online Training) ie. $50 \times 0.7 = 35$
Number of participants in Scheduled Training Courses.	280	The total is based on a target of 8 participants per course for 35 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 60 participants	Enrolment in this course declined in 2015. TUEF proposes to maintain the course offering for delegates unable to attend classroom training.
Federal Right of Entry Laws – Numbers of participants	Completion of course by 700 participants	Completion of this course enables participants to apply for a right of entry permit under the <i>Fair Work Act 2009</i> . The 2016 target has been increased to reflect strong enrolment in 2015.
Single Union - Non-Scheduled Training		
Number of Non-Scheduled Training Courses Delivered.	64	Delivery target is 80% of non-scheduled training courses ie $80 \times 0.8 = 64$
Number of participants in Non-Scheduled Training Courses.	512	The total is based on a target of 8 participants per course for 64 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	100	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
Scott Connolly Assistant Secretary ACTU Director TUEF	Role: Project Director Responsibilities: <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. 	ACTU Level 6, 365 Queen Street Melbourne VIC 3000
Director – Leadership Programs ACTU Organising Centre	Role: Project Management Support Responsibilities: <ul style="list-style-type: none"> • Provides project management support to the Project Director. • Accountable to the Project Director for development and delivery of curriculum for union leaders. 	ACTU Organising Centre Trades Hall Building Level 3, 4-10 Goulburn Street, Sydney, NSW 2000
Compliance and Grants Manager ACTU Organising Centre	Role: Project Officer Responsibilities: <ul style="list-style-type: none"> • Delivers administrative and financial planning and reporting required to support the Project in accordance with the Funding Agreement • Provides project management support to the Project Director and Director - Leadership Programs. • Primary point of contact for the project on behalf of TUEF. 	ACTU Organising Centre Level 4, 365 Queen Street Melbourne VIC 3000

Project Team ACTU Organising Centre	Role: To provide specific skills and expertise as required. <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. • RTO Compliance Officer. ACTU Organising Centre. Responsible for compliance management with respect to nationally accredited courses. • Administrative Coordinator, ACTU Organising Centre. Responsible for business processes, course administration and support. • General Manager, ACTU. Responsible for financial management advice. • ACTU IT Support. Responsible for IT support, including support for ACTU Organising Centre webpages, databases, training equipment and interface with Learning Management Systems for online courses. 	
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4 Risk Management

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

Risk	Management Strategy	Likelihood (H/M/L)	Impact (H/M/L)	Control Rating (Poor/Good/Very Good)
Risk of mismanagement or fraud associated with the funds	<ul style="list-style-type: none"> • 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>Insufficient attendance at scheduled training, affecting course delivery and participation</p> <p>Emerging Risk:</p> <p>Federal election in 2016 may impact attendance.</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 to ensure quality and relevancy Course Evaluation Questionnaires to inform review of courses Re-scheduling of courses with low enrolments to meet market demand. Re-scheduling of courses outside election period, once known. 	M	H	Good
<p>Staffing availability for scheduled training</p>	<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
<p>Education content not of consistent high quality</p>	<ul style="list-style-type: none"> Professional development for staff Professional mentoring for educators Completion of Certificate IV and Diplomas in WHS, Training and Assessment, and Unionism & Industrial relations by relevant educators. Course Evaluations and Phone Survey used to review program content and delivery. 	L	H	Very Good
<p>Staffing availability for Curriculum Development and Review</p>	<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
<p>Insufficient project scoping may lead to an underestimate of effort and complexity of project tasks, impacting project completion and/or budget.</p>	<ul style="list-style-type: none"> Ensure project requirements are sufficiently analysed and assessed in terms of effort, complexity, and cost. 	L	H	Good

Inadequate industry coverage and inconsistent delivery across industries / geography	<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
Risks associated with management of subcontractors Note: TUEF does not anticipate utilising any subcontractors during this period to deliver the Project.	<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

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)

Provide a list of all assets the Union Education Foundation intends to purchase or create during this project period and indicate the associated line item in the budget

- 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 during this project period.

6 Budget

Provide a comprehensive budget including:

- *Itemised expenditure for 1 January – 31 December 2016;*
- *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 – 2016 TUEF 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 any income received for delivery of training 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.

No changes to evaluation mechanisms specified in the Milestones and Deliverables Plan, as varied by previous Outline Plans, are proposed.

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 Sections 2.6 & 2.7 of this Outline Plan, ie:

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

Evaluation of performance against objectives will be reported in the annual Summary Report of activities required under Clause 11.1(c) of the Funding Agreement. The Report will 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 2016 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.

8 Submitting your Outline Plan

Please email a signed copy of the completed PET Fund Outline Plan by close of business on Friday 31 January 2016 to: Programme Manager, PET Fund, at the:

PET Fund Inbox - PETFund@employment.gov.au

Annex A - TUEF PET Fund Course Schedule and Course Descriptions

NO. OF COURSES PER STATE											
Course Title	Target Group	ACT	NSW	NT	QLD	SA	TAS	VIC	WA	Online	Total
Advanced Recruitment Skills	Organisers							1			1
Advocacy	Officials, Organisers & Industrial Officers		1		1			1			3
Bargaining under the Fair Work Act	Officials, Organisers & Industrial Officers					1					1
#Certificate IV in Work Health & Safety	OHS Specialists		1		1			2			4
#Craft of Organising	Organisers					1		1			2
^Delegates Online	Delegates & Activists									1	1
^Federal Right of Entry Laws	Officials									1	1
Lead Organiser Development Stage 1 Non-Residential	Lead Organisers					1					1
Lead Organiser Development Stage 1 Residential	Lead Organisers		1								1
Leading Campaigns	Lead Campaigners		1					1			2
#Leading Unions Residential	Senior Officials		1								1
Negotiation Skills for Organisers	Organisers		1					1			2
Organising for Safer Workplaces	Organisers		1			1	1				3
#Organising Foundations	New Organisers		2		1			2			5
#Organising Works Program (Certificate IV in Unionism & Industrial Relations)	New Organisers		1		1			1			3
Public Speaking Skills	Organisers		1								1
#Training Skills for Union Educators (Certificate IV in Training & Assessment)	Union Educators		1					1			2
Union Governance	Officials	2	2		2	2	2	2	2		14
Working for Unions	Admin & New Union Staff		1		1			1			3
Workplace Union Leaders	Delegates & Activists					1					1
Total		2	15	0	7	7	3	14	2	2	52

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 Course Schedule and Course Descriptions 2016

DESCRIPTION	STATE	START DATE			END DATE		
		DAY	DATE	MONTH	DAY	DATE	MONTH
Delegates Online Education Program	Online	Friday	1	January	Saturday	31	December
Federal Right of Entry Laws	Online	Friday	1	January	Saturday	31	December
Union Governance	NSW	Tuesday	2	February	Tuesday	2	February
Organising Foundations - Part 1	VIC	Tuesday	16	February	Thursday	18	February
Union Governance	ACT	Wednesday	17	February	Wednesday	17	February
Certificate IV in WHS - Part 1	VIC	Monday	22	February	Wednesday	24	February
Craft of Organising - Part 1	SA	Tuesday	23	February	Friday	26	February
Organising for Safer Workplaces	NSW	Monday	29	February	Tuesday	1	March
Union Governance	TAS	Thursday	3	March	Thursday	3	March
Certificate IV in WHS - Part 2	VIC	Tuesday	15	March	Friday	18	March
Organising Foundations - Part 2	VIC	Wednesday	16	March	Thursday	17	March
Negotiation Skills for Organisers	NSW	Tuesday	22	March	Thursday	24	March
Craft of Organising - Part 2	SA	Monday	4	April	Thursday	7	April
Union Governance	WA	Tuesday	5	April	Tuesday	5	April
Organising Foundations - Part 1	NSW	Tuesday	5	April	Thursday	7	April
Advocacy	VIC	Monday	11	April	Friday	15	April
*Leading Unions - Week 1 (Residential) 2016 intake	NSW	Monday	11	April	Friday	15	April
Union Governance	QLD	Wednesday	13	April	Wednesday	13	April
Public Speaking Skills	NSW	Tuesday	19	April	Tuesday	19	April
Advanced Recruitment Skills	VIC	Tuesday	19	April	Thursday	21	April
Working for Unions	NSW	Wednesday	27	April	Thursday	28	April
Organising Foundations - Part 2	NSW	Tuesday	3	May	Wednesday	4	May
Organising Foundations - Part 1	QLD	Tuesday	3	May	Thursday	5	May
Union Governance	SA	Thursday	5	May	Thursday	5	May
*Leading Unions - Week 2 (Residential) 2015 intake	NSW	Monday	9	May	Friday	13	May
Union Governance	VIC	Wednesday	11	May	Wednesday	11	May
Training Skills for Union Educators - Certificate IV in TAA - Part 1	NSW	Tuesday	17	May	Friday	20	May
Leading Campaigns	NSW	Monday	23	May	Friday	27	May
Working for Unions	QLD	Tuesday	24	May	Wednesday	25	May
Craft of Organising - Part 1	VIC	Tuesday	24	May	Friday	27	May
Organising Foundations - Part 2	QLD	Tuesday	31	May	Wednesday	1	June
*Organising Works Course 01: Induction	NSW	Monday	6	June	Tuesday	7	June
^Organising Works Course 01: Induction	QLD	Monday	6	June	Tuesday	7	June
^Organising Works Course 01: Induction	VIC	Monday	6	June	Tuesday	7	June
Lead Organiser Development Program - Non-Residential	SA	Monday	6	June	Friday	10	June
Training Skills for Union Educators - Certificate IV in TAA - Part 2	NSW	Tuesday	14	June	Friday	17	June
Bargaining under the Fair Work Act	SA	Monday	20	June	Wednesday	22	June
*Leading Unions - Week 2 (Residential) 2016 intake	VIC	Monday	20	June	Friday	24	June
Craft of Organising - Part 2	VIC	Tuesday	21	June	Friday	24	June
Negotiation Skills for Organisers	VIC	Tuesday	12	July	Thursday	14	July
Leading Campaigns	VIC	Monday	25	July	Friday	29	July
Certificate IV in WHS - Part 1	NSW	Tuesday	26	July	Thursday	28	July
Union Governance	ACT	Wednesday	3	August	Wednesday	3	August
Advocacy	NSW	Monday	8	August	Friday	12	August
Union Governance	QLD	Tuesday	9	August	Tuesday	9	August
Training Skills for Union Educators - Certificate IV in TAA - Part 1	VIC	Tuesday	9	August	Friday	12	August
Organising for Safer Workplaces	TAS	Monday	15	August	Tuesday	16	August
Certificate IV in WHS - Part 2	NSW	Tuesday	16	August	Friday	19	August
Union Governance	TAS	Wednesday	17	August	Wednesday	17	August
Organising Foundations - Part 1	NSW	Tuesday	23	August	Thursday	25	August
Union Governance	WA	Wednesday	24	August	Wednesday	24	August
Union Governance	VIC	Thursday	1	September	Thursday	1	September
Advocacy	QLD	Monday	5	September	Friday	9	September
Training Skills for Union Educators - Certificate IV in TAA - Part 2	VIC	Tuesday	6	September	Friday	9	September
Union Governance	NSW	Wednesday	7	September	Wednesday	7	September
Workplace Union Leaders	SA	Monday	12	September	Friday	16	September
Organising Foundations - Part 2	NSW	Tuesday	20	September	Thursday	21	September
Organising for Safer Workplaces	SA	Tuesday	27	September	Wednesday	28	September
Organising Foundations - Part 1	VIC	Tuesday	4	October	Thursday	6	October
Working for Unions	VIC	Tuesday	11	October	Wednesday	12	October
Certificate IV in WHS - Part 1	QLD	Tuesday	11	October	Thursday	13	October
Union Governance	SA	Friday	21	October	Friday	21	October
Organising Foundations - Part 2	VIC	Thursday	3	November	Friday	4	November
Lead Organiser Development Program - Residential	NSW	Sunday	6	November	Friday	11	November
Certificate IV in WHS - Part 2	QLD	Tuesday	8	November	Friday	11	November
Certificate IV in WHS - Part 1	VIC	Monday	21	November	Wednesday	23	November
*Leading Unions - Week 3 (Residential) 2015 intake	SA	Monday	28	November	Friday	2	December
Certificate IV in WHS - Part 2	VIC	Monday	12	December	Thursday	15	December

Appendix A - TUEF PET Fund Course Schedule and Course Descriptions 2016

***Leading Unions** (formerly Union Management) – the 2016 schedule includes two offerings of this course:

a) Weeks 2 and 3 of the 2015 intake. Week 1 of this course was delivered in December 2015 and reported in the TUEF PET Fund Summary Report 2015. Weeks 2 and 3 will not be recorded as a course for reporting purposes in 2016. Participant evaluations will however be reported.

b) Weeks 1 and 2 of the 2016 intake. For reporting purposes this course will be recorded as 1 course in 2016, and associated participant data and evaluations reported. Week 3 will be delivered in early 2017, consistent with the revised structure for this course which places a greater emphasis on individual and group projects between classroom training (please refer to Addendum to TUEF PET Fund 2015 Outline Plan, dated 28 October 2015, for further information).

^ Certificate IV in Unionism and Industrial Relations (Organising Works) - This course usually commences in February each year. In 2016 this course will be reviewed and it is anticipated delivery will commence in June 2016. TUEF will submit a revised course description and schedule for departmental approval as Addendum to the Outline Plan later in 2016, following completion of the review.

Appendix A - TUEF PET Fund Course Schedule and Course Descriptions 2016

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	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 Specialists	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.

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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>

Appendix A - TUEF PET Fund Course Schedule and Course Descriptions 2016

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) Note: This course is under review in early 2016. A revised course description will be submitted for departmental approval prior to scheduling of the revised course.	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.

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 a 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 Course Descriptions 2016

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.

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.

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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 Course Descriptions 2.

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.
Leading Unions - Residential <i>formerly Union Management</i>	Senior Officials	<p>This 3-week leadership program examines the nature and importance of good leadership in the union movement, and the challenges of leading Australian unions in a dynamic industrial, economic and policy environment.</p> <p>Participants will reflect on their own leadership practice and develop new strategic management and managerial skills to improve leadership and organisational capacity at all levels within their unions and workplaces.</p> <p>A greater understanding of organisational design and adaptive leadership will also contribute to greater innovation in workplace representation and negotiations – the more leaders understand their own adaptive challenges in running an organisation, the more we can understand employer challenges.</p> <p>Between each course participants will undertake adaptive leadership projects, as a group and individually, that respond to the leadership challenges facing their union and industry.</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.
Level 2 Delegates	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.

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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).
<p>Negotiation Skills for Delegates (Level 2 Delegates) <i>[formerly Negotiation Skills for Bargaining]</i></p>	<p>Delegates and Activists</p>	<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>	<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>Negotiation Skills for Organisers (Level 2 Organisers)</p>	<p>Officials and Organisers</p>	<p>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.</p>	<p>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.</p>
<p>WHS for Delegates (Level 2 Delegates) <i>[formerly OHS for Delegates]</i></p>	<p>Delegates, Activists and Workplace Representatives</p>	<p>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.</p> <p>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.</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>

Appendix A - TUEF PET Fund Course Schedule and Course Descriptions 2.

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).
Organiser Development [for NT only] (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.
Organising for Safer Workplaces (Level 2 Organisers)	Organisers	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. 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	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.

Appendix A - TUEF PET Fund Course Schedule and Course Descriptions 2016

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).
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.
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.

Appendix A - TUEF PET Fund Course Schedule and Course Descriptions 2.

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 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.
Working for Unions	Non Industrial Union Staff	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.	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.
Workplace Bullying and Harassment	Officials and Organisers	This course provides organisers with information on current legislative provisions and safeguards applicable to bullying and harassment in the workplace, and will equip them with the skills to deal with bullying and harassment issues being experienced by their members.	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.
Workplace Union Leaders (Level 3 Delegates)	Delegates and Activists	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.	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.

Draft Budget - TUEF Productivity Education and Training (PET) Fund Project - Jan to Dec 2016

All figures are GST exclusive

	2016 Budget	Notes
Income		
TUEF Grant Monies	\$1,055,556	Annualised draw down of PET Fund Grant Monies for accounting purposes. This is greater than \$1m pa. as the Grant was not fully utilised during the scoping phase of the project.
Interest Received	\$260,000	Projected interest on term deposits.
Total Grant Monies and Interest	\$1,315,556	
Education Income		
Scheduled Training	\$214,530	Income projected is based on achieving 70% delivery of multi-union scheduled training courses, with minimum 8 participants per course. (Excludes income projected from 2 residential scheduled courses, 3 Organising Works and 2 Online courses. Income for those activities is shown separately below.)
Lead Organiser Development Course - Residential	\$20,200	Projected income from delivery of one Lead Organiser residential course in 2016, with minimum 8 participants.
Leading Unions Course - Residential	\$94,400	Projected income from delivery of weeks 2 & 3 of the Leading Unions course that commenced in 2015, and weeks 1 & 2 of the Leading Unions commencing in 2016. Assumes 8 participants per intake.
Non Scheduled Training	\$123,200	Income projected is based on achieving 80% delivery of 80 single-union non-scheduled training courses, with minimum 8 participants per course.
Online Training	\$74,600	Projected income from delivery of Federal Right of Entry course and Delegates Online Education Program in 2016.
Organising Works Program	\$33,000	Organising Works is currently anticipated to commence mid-year in 2016. The budget assumes 3 courses will commence in QLD, NSW & VIC, but that income may be distributed over 2 years. The budget will be updated following completion of the course review.
Total Education Income	\$559,930	
Reimbursements	\$30,000	Includes reimbursements for Education Expenses and for a proportion of TUEF WA Global Expenses.
TOTAL INCOME	\$1,905,486	
Expenses		
Education Expenses (other than staffing costs)		
Scheduled Training Expenses	\$15,000	Provision for training expenses other than travel.
Lead Organiser Development Course - Residential	\$16,858	Projected accommodation and travel expenses for this residential course with minimum 8 participants and 1 educator.
Leading Unions Course - Residential	\$77,860	Accommodation and travel expenses for 2 x 3 week residential courses. Budgeted on minimum 8 participants + 2 educators per week.
Online Training Expenses	\$10,100	Licensing and maintenance of the Online Learning Management System supporting federal Right of Entry and Delegates Online.
Organising Works Program Expenses	\$2,000	Provision only for educator travel to course participant worksites.
Further Upgrade of Education & Training Webpages - Phase 2 - Enabling Online Enrolment and Payment.	\$10,000	In late 2015 the department approved expenditure of up to \$8,300 for development of an online training booking system. \$7,160 is still to be spent. Further provision of \$2,840 is made to allow for purchase of additional 'observer' licences to enable educators to view enrolments and participant training history, subject to satisfactory implementation of the booking system.
Total Education Expenses	\$131,818	
Administration		
ACTU OECC Overhead Fees	\$195,000	Proportion of overhead fees. Based on distribution of EFT between 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	\$102,486	Lease and outgoings of office space for staff located in NSW, SA, WA & VIC.
Advertising	\$0	
Audit Fees	\$5,600	Audit performed at end of financial year.
Accounting Fees	\$20,400	
Bank Charges	\$2,400	
Call Centre Surveys	\$1,100	Annual Evaluation Survey of PET-funded course participants.
Contracted Services	\$1,000	
Equipment costs	\$10,000	
Publications	\$15,000	Production of ACTU Course Guide, Calendar and Online Promotion.
Sundries	\$1,000	
Teleconferencing	\$100	
Term Deposit Fee	\$3,000	TUEF deposited the principal of the PET Fund Grant Monies in a new term deposit during 2015. While access to the selected term deposit attracted a fee, the interest earned is greater than would have been achieved under the previous instrument, even after the fee has been deducted. Interest earned on Grant Monies is reinvested in the Project.
Total Administration	\$357,086	
Travel & Accommodation	\$35,000	Includes costs for Air fares, Accommodation, Travel Expenses and Travel Allowances to undertake interstate course delivery and curriculum development.
Staffing Costs	\$1,790,000	Includes salaries, oncosts and professional development for 14 EFT allocated to delivery of the TUEF PET Fund Project in 2016.
TOTAL EXPENSES	\$2,313,904	
Net Income/Expenditure	-\$408,418	Estimated draw down of Grant Monies in 2016, additional to accounting allocation.

From 2014, consistent with Clause 11 of the Funding Agreement, TUEF's planning and reporting cycle for the PET Fund Project has been 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 any preferred presentation of this information.

YEAR	2012-2013 [‡]	2013-2014 [‡]	2014-2015 [‡]	Jul-Dec 2015 ^α	2016	2017	2018	2019	2020	2021	2022
Balance at beginning of period*[#]	\$10,000,000	\$10,189,186	\$10,122,454	\$10,005,802	\$9,492,831	\$8,153,884	\$6,778,116	\$5,364,514	\$3,912,039	\$2,419,620	\$886,159
Plus income (including interest)[^]	\$299,887	\$386,074	\$344,036	\$160,992	\$261,053	\$224,232	\$186,398	\$147,524	\$107,581	\$66,540	\$24,369
Less Net Expenditure[#]	\$110,701	\$452,806	\$460,688	\$673,963	\$1,600,000	\$1,600,000	\$1,600,000	\$1,600,000	\$1,600,000	\$1,600,000	\$910,529
Balance at end of period[#]	\$10,189,186	\$10,122,454	\$10,005,802	\$9,492,831	\$8,153,884	\$6,778,116	\$5,364,514	\$3,912,039	\$2,419,620	\$886,159	\$0

[‡] Represents actuals for the 2012-2013, 2013-2014 and 2014-2015 financial years, post-audit.

^α Represents recorded income and expenditure for the July to December 2015 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.