



**Productivity Education and Training Fund (PET Fund)**

**The Union Education Foundation**

**Outline Plan**

**From: 1 January 2017 to 31 December 2017**

Approval of this Outline Plan		Signature and Date
The Union Education Foundation	Delegate:  Scott Connolly Assistant Secretary ACTU Director, TUEF	<date> 30-1-17. x 
Department of Employment	Delegate:  Branch Manager responsible for programme	<date> 8/3/17 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 2017. It establishes:

- what the project is to deliver from 1 January – 31 December 2017;
- 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

### 2.1 Delivery of Training Programs

#### *Multi Union - Scheduled Training*

At the time of writing TUEF proposes to offer 58 multi-union scheduled training courses under the PET Fund Project in 2017, excluding Online Training.

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.

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

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.

#### Notes:

- (i) *Organising Works Program* - In 2017 TUEF hopes to deliver the Organising Works program in the Australian Capital Territory for the first time. At the time of writing this program is not confirmed and is subject to sufficient enrolments.

The 2017 delivery target of 58 multi-union courses does not include continuing delivery of the three Organising Works programs that commenced in 2016 in NSW, VIC and QLD, as these occurrences have already been recorded in the **TUEF PET Fund 2016 Summary Report**. Course dates are however listed in **Appendix A – PET Fund Course Schedule and Course Descriptions 2017** for the department's information.

(ii) **Advocacy** – the 2017 schedule will offer 3 occurrences of this course in NSW, VIC and QLD. Course dates are yet to be finalised with the specialist educator contracted for this course. TUEF will advise the department of course dates once confirmed.

(iii) The following changes to TUEF's curriculum and course descriptions are proposed in 2017:

- **Economics for Unionists** – This 5-day course was formerly titled *Economics/Political Economy for Unionists*. In 2017 the course title has been simplified to assist market attraction. A 2-day introductory version of the course titled *Economics for Unionists - Intensive* will also be offered in 2017 to make economics skills training available to participants unable to attend a 5-day course.
- **Experienced Organiser Program – (Incorporating Certificate IV in Unionism and Industrial Relations)** – There has been limited enrolment in this program since its introduction in 2014, and the program will not be offered from 2017. Experienced organisers seeking to gain the nationally accredited qualification *Certificate IV in Unionism and Industrial Relations* will still be able to do so through application through Recognition of Prior Learning.
- **Managing People Effectively** – This new 2-day course is part of TUEF's continuing development of shorter, flexible leadership skills programs. The course builds the skills necessary for the effective management of staff and the building of productive and capable organisations.
- **Social Media Skills** – formerly titled *Interactive and Social Media Skills*, the course title and content have been updated to reflect the greater priority of social media as a platform for contemporary workplace communications.
- **Strategic Industry and Corporate Research** – TUEF has previously offered two courses providing industrial research skills - *Introduction to Strategic Industry and Corporate Research* for new researchers, and *Advanced Corporate Research* for experienced researchers.

There has been insufficient enrolment to enable either course to be delivered in recent years. In 2017 TUEF will offer one amalgamated 3-day course, to maximise enrolment. Training content will be tailored to the experience level of participants.

- **Training Skills for Union Educators** – In 2017 TUEF will not be offering the option to undertake the additional Part 2 of this course that leads to the accredited qualification *Certificate IV in Training and Assessment*, due to changes to participant eligibility requirements released by the Australian Skills Quality Authority in April 2016.

The qualification now requires participants to demonstrate vocational competency in their proposed teaching and assessing area before commencing the course. Many of TUEF's participants undertake this course to broaden their skills, but may be unable to meet this eligibility requirement. TUEF will monitor demand for the qualification and review this position at the end of 2017. During this period Training Skills for Union Educators will be delivered as a standalone, non-accredited 4-day training skills course.

(iv) As reported in the **TUEF PET Fund 2016 Summary Report**, in late 2016 TUEF piloted a Leadership Seminar on Organisational Governance to all ACTU staff, addressing principles of organisational governance, accountability and probity.

The training differs from the approved Union Governance course required under the *Fair Work (Registered Organisations) Act 2009*, as it focuses on systems of organisational governance for any

union employee or official, rather than the specific obligations of those with financial decision-making responsibilities.

In 2017 it is proposed to deliver up to 7 Leadership Seminars in Organisational Governance to union leaders nationally as part of TUEF's continuing development of flexible leadership skills training.

The seminars will be delivered by a contracted external trainer with broad expertise in corporate and organisational governance in the not-for-profit, public and private sectors. Seminar dates are yet to be finalised. TUEF will advise the department of course dates once confirmed.

Please refer to **Appendix A: TUEF PET Fund Course Schedule and Course Descriptions 2017** for further detail regarding 2017 scheduled courses by location, date and for course descriptions.

TUEF will provide the department with an updated schedule of multi union courses current PET Fund Course Schedule on 31<sup>st</sup> July 2017 as part of mid-year financial reporting required under Funding Agreement for the PET Fund Project, and otherwise on request.

### ***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 2017 TUEF proposes to deliver 80 non-scheduled training courses, consistent with targets for delivery of non-scheduled courses under the PET Fund Project in 2016.

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.

### ***Online Training***

The following online training courses will be delivered with the support of the PET Fund Project in 2017.

- **Federal Right of Entry Laws** - This course attracted significantly greater than anticipated enrolment in 2016 (refer section 2.1 of TUEF PET Fund 2016 Summary Report) and TUEF has increased 2017 enrolment targets accordingly to 900 participants.
- **Delegates Online Education Program** – Enrolment in this course was lower than anticipated in 2016 (refer section 2.1 of TUEF PET Fund 2016 Summary Report). A modest annual enrolment target of 30 has been established for this course in 2017.

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.

However, as outlined in **Section 2.2 – Curriculum Review and Development Activity** overleaf, in 2017 TUEF proposes to upgrade the current Online Learning Management System in 2017 and will seek to improve the presentation and accessibility of the Delegates Online Education Program when transitioning the program to the new platform.

## 2.2 Curriculum Review and Development Activity

TUEF proposes to undertake the following curriculum review and development activities in 2017:

### (i) *Union Governance*

In 2017 TUEF proposes to review its Fair Work Commission-approved *Union Governance* and *Union Governance Train the Trainer* courses.

The *Fair Work (Registered Organisations) Act* 2009 requires union officers and staff with financial decision-making responsibilities to undertake Commission-approved training in the area of financial governance within 6 months of their appointment.

The legislation was recently amended by the *Fair Work (Registered Organisations) Amendment Act* 2016. TUEF will review the course to ensure compliance with current statute and to ensure curriculum effectively transfers knowledge and understanding of union governance obligations.

TUEF will engage with the Commission and any other relevant statutory authorities to ensure course content meets statutory requirements.

### (ii) *Upgrade of Online Learning Management System*

TUEF currently offers 2 courses delivered wholly online – *Federal Right of Entry Permit* and *Delegates Education Online Program*. The courses were launched in 2011-12 using the Moodle online learning platform. There is no public interface and participants are enrolled into the platform by ACTU Organising Centre administrative staff.

Since these courses were developed there has been a transformation in availability and use of digital online learning platforms and personal internet-enabled devices. TUEF's online education offering is now significantly out of step with market expectations of a contemporary, adult learning organisation. Training participants and educators increasingly expect to undertake training activities online, in and out of the classroom and accessible via smart phones and other personal internet-enabled devices.

In January 2017 the TUEF Board approved expenditure of up to \$50,000 towards initial licence, testing and development of a new Online Learning Management System (LMS). This upgrade will be funded within TUEF's own resources, and will not require financial support from the TUEF PET Fund Project.

It is envisaged the new LMS will be launched in mid-2017, following which TUEF proposes to commence a project to extend the online accessibility of TUEF PET Fund curriculum by:

- Updating the content, presentation and interactivity of *Federal Right of Entry Permit* course and the *Delegates Education Online Program* for transition to the new LMS; and
- Prioritising TUEF classroom-based curriculum for development as online content via the LMS, to:
  - Improve integration of online content and activities with classroom delivery;
  - Facilitate participants learning pathways online, in and out of the classroom; and
  - Increase TUEF's provision of curriculum online.

It is proposed that TUEF PET Fund Grant Monies be used to enable Educators to progressively review and develop approved curriculum for publication on the LMS, within salary provision proposed at **Appendix C – 2017 TUEF PET Fund 2017 Budget**.

As outlined in **Appendix C** \$5,000 budget provision is also proposed in 2017 for purchase of software licences necessary to enable creation of engaging, interactive e-learning online content.

**(iii) Training Promoting Equity and Social Inclusion**

In 2017 TUEF proposes to extend development and delivery of skills training that promotes economic prosperity and social inclusion for all Australians, consistent with the objectives of the Funding Agreement.

- **Indigenous Delegate Leadership Training**

During this reporting period TUEF Educators will continue to work with the ACTU Indigenous Officer to create opportunities to deliver Indigenous Delegate Leadership Training.

In 2017 TUEF proposes to extend delivery of this training through a pilot project to appoint an Educator dedicated to promoting and delivering training programs to Indigenous delegates. The Educator will be based in Queensland, and prioritise extension of the program in that state, but will also deliver training to Indigenous delegates and organisers on demand nationally.

Provision has been made accordingly in the draft TUEF PET Fund 2017 Budget at Appendix C for appointment of up to 1.0EFT from the second quarter of 2017 on a short-term contract basis. Aboriginal and Torres Strait Islanders will be strongly encouraged to apply.

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 Project objectives and approved Outline Plans.

- **Disability Awareness and Inclusion Training Modules**

In 2017 TUEF proposes to further expand curriculum promoting equity and social inclusion in the economy, the workplace and in unions' representative practices through development of training modules addressing barriers to representation and inclusion of people with disability, and the economic benefits of fair and inclusive workplace practices.

It is envisaged the modules could be delivered as standalone training, but will also provide training resources that can be incorporated into delegate, organiser and leadership training where those courses address issues of economic and social inclusion.

This project is likely to require external consultancy expertise and provision has been made accordingly in the draft TUEF PET Fund 2017 Budget at Appendix C.

**(iv) Delegate Development**

As demonstrated in the TUEF PET Fund 2016 Summary Report most delegates training is delivered on demand as classroom-based, single union training, and the majority of which is Core Skills for Delegates courses provided to relatively inexperienced delegates. Analysis of delegate training delivered in 2016 also indicates that most of this training is delivered in Victoria and NSW.

TUEF is concerned there is insufficient national delivery of the full range of delegates skills courses, from Level 1 introductory courses to Level 3 experienced delegates courses. Additionally, the lack of delivery of multi-union delegates training at all levels may be limiting opportunities for delegates to share skills and experiences across different unions and industries.

To address this concern, in 2017 TUEF will undertake a project to review and develop a program of delegate development training with the intention of attracting greater enrolment in delegate training nationally, and increasing delegate training delivery.

To assist in this project TUEF proposes to appoint up to 3 educators nationally on short-term 12 month contracts to develop and implement the project. The draft TUEF PET Fund 2017 Budget at Appendix C makes provision for recruitment of 1.0 EFT from February 2017 for curriculum development and affiliate consultation, and up to 2.0 EFT from June 2017 for implementation of training. This project is currently in the scoping phase and TUEF is not able to model corresponding income in the draft budget at this stage.

### **2.3 Publications / Marketing**

Proposed marketing activities for 2017 will include:

- Online promotion of the 2017 multi-union course schedule
- Publication and distribution of the printed 2017 Wall Calendar
- Regular distribution of e-newsletters to affiliates promoting upcoming course information

In 2017 TUEF will also undertake review of the format and distribution of its Course Guide. The Guide is currently printed for distribution to all affiliates and published online as a pdf document. Recognising the increasing market preference for access to dynamic course information online and via mobile devices, TUEF will undertake a review of the most effective contemporary means of promoting TUEF curriculum.

### **2.4 Professional Development of Staff**

Staff development will continue through:

- Attending relevant training and skills development courses
- Co-training with an experienced educator the first time of delivering a course
- Being supported through internal coaching and mentoring
- Participating in curriculum review and development projects
- Supporting educators to obtain Certificate IV and/or Diploma qualifications in Work Health & Safety, and Unionism & Industrial Relations
- Undertaking short professional development placements with affiliates 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 TUEF's curriculum;
  - Identify training resources and practices that could enhance the TUEF curriculum; and
  - Deliver training and/or mentoring to delegates, organisers, educators and officials.

**Note:** 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.

### **2.5 Geographic and Industry Coverage**

- TUEF has allocated resources in NSW, VIC, QLD, WA and SA.
- Scheduled training will be offered in all states and territories, except the Northern Territory where there is insufficient demand 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.



## 2.6 Delivery Targets for the period are:

Key Performance Indicator	Delivery Target	Comments
<b>Multi Union - Scheduled Training</b>		
Number of Scheduled Training Courses Delivered.	41	Delivery target is 70% of scheduled training courses (excluding Online Training) ie. $58 \times 0.7 = 41$
Number of participants in Scheduled Training Courses.	328	The total is based on a target of 8 participants per course for 41 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).
<b>Online Training</b>		
Delegates Online Education Program – Numbers of participants	Completion of course by 30 participants	Enrolment in this course declined in 2016. The 2017 target has been reduced to reflect current market demand.
Federal Right of Entry Laws – Numbers of participants	Completion of course by 900 participants	Completion of this course enables participants to apply for a right of entry permit under the <i>Fair Work Act 2009</i> . The 2017 target has been increased to reflect strong enrolment in 2016.
<b>Single Union - Non-Scheduled Training</b>		
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).
<b>Training Participant Survey</b>		
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	<b>Role: Project Director</b> <b>Responsibilities:</b> <ul style="list-style-type: none"> <li>• Provides project oversight and direction on behalf of the TUEF Board.</li> <li>• Accountable to the TUEF Board for delivery of the project in accordance with the Funding Agreement.</li> </ul>	ACTU Level 6, 365 Queen Street Melbourne VIC 3000
Director – Leadership Programs ACTU Organising Centre	<b>Role: Project Management Support</b> <b>Responsibilities:</b> <ul style="list-style-type: none"> <li>• Provides project management support to the Project Director.</li> <li>• Accountable to the Project Director for development and delivery of curriculum for union leaders.</li> </ul>	ACTU Organising Centre Trades Hall Building Level 3, 4-10 Goulburn Street, Sydney, NSW 2000
Compliance and Grants Manager ACTU Organising Centre	<b>Role: Project Officer</b> <b>Responsibilities:</b> <ul style="list-style-type: none"> <li>• Delivers administrative and financial planning and reporting required to support the Project in accordance with the Funding Agreement</li> <li>• Provides project management support to the Project Director and Director - Leadership Programs.</li> <li>• Primary point of contact for the project on behalf of TUEF.</li> </ul>	ACTU Organising Centre Level 4, 365 Queen Street Melbourne VIC 3000

<p><b>Project Team</b> <b>ACTU Organising Centre</b></p>	<p>Role: To provide specific skills and expertise as required.</p> <ul style="list-style-type: none"> <li>• <b>Educators ACTU Organising Centre.</b> Responsible for curriculum development, delivery of training courses and reporting on outcomes and evaluations.</li> <li>• <b>RTO Compliance Officer. ACTU Organising Centre.</b> Responsible for compliance management for nationally accredited courses.</li> <li>• <b>Administrative Coordinator, ACTU Organising Centre.</b> Responsible for business processes, course administration and support.</li> <li>• <b>General Manager, ACTU.</b> Responsible for financial management advice.</li> <li>• <b>ACTU Indigenous Officer –</b> Assists with the promotion and development of culturally appropriate training to Indigenous representatives.</li> <li>• <b>ACTU IT Support.</b> Responsible for IT support, including support for webpages, databases, IT equipment and licensing.</li> </ul>	
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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
<p><b>Risk of mismanagement or fraud associated with the funds</b></p>	<ul style="list-style-type: none"> <li>• Maintenance of appropriate financial management systems.</li> <li>• Regular financial reporting to the Project Manager by ACTU General Manager, including P&amp;L vs. Budget and Balance Sheets.</li> <li>• Project progress reporting to the TUEF Board, including financial reporting.</li> <li>• Accounts audited annually by an independent auditor.</li> </ul>	L	H	Very Good

<p><b>Insufficient attendance at scheduled training</b></p> <p><b>Emerging Risk:</b></p> <p><b>ACTU National Organising Conference in June 2017 may impact attendance at Organiser training in May-June 2017.</b></p>	<ul style="list-style-type: none"> <li>Marketing of courses using internal and external networks</li> <li>Allowing adequate timeframes for advertising</li> <li>Re-scheduling of courses with low enrolments to meet market demand.</li> <li>Minimise scheduling of courses for organisers in May-June 2017.</li> </ul>	M	H	Good
<p><b>Staffing availability for scheduled training</b></p>	<ul style="list-style-type: none"> <li>TUEF has allocated training resources in NSW, VIC, QLD, WA and SA.</li> <li>Additional contract training resources can be provided on demand.</li> </ul>	L	H	Very Good
<p><b>Education content not of consistent high quality</b></p>	<ul style="list-style-type: none"> <li>Course planning and review to ensure quality and relevance.</li> <li>Course Evaluations, Annual Training Participant Survey and Quality Indicator Survey used to review program content and delivery.</li> <li>Professional development for staff</li> <li>Professional mentoring for educators</li> <li>Completion of relevant qualifications by educators.</li> <li>Contracting external training expertise as required</li> </ul>	L	H	Very Good
<p><b>Staffing availability for Curriculum Development and Review</b></p>	<ul style="list-style-type: none"> <li>Identification of tasks and commitment of required skills and expertise in ACTU Organising Centre workplans.</li> <li>Identification of alternative resources in the event of unforeseen changes to workplan or staff availability.</li> </ul>	M	H	Good
<p><b>Insufficient project scoping may lead to an underestimate of effort and complexity of project tasks, impacting project completion and/or budget.</b></p>	<ul style="list-style-type: none"> <li>Ensure project requirements are sufficiently analysed and assessed in terms of effort, complexity, and cost.</li> </ul>	L	H	Good

<b>Inadequate industry coverage and inconsistent delivery across industries / geography</b>	<ul style="list-style-type: none"> <li>Allocated resources in NSW, VIC, QLD, WA and SA to provide training.</li> <li>Additional contract training resources provided on demand.</li> <li>Trainers can be flown interstate to meet demand.</li> </ul>	M	H	Good
<b>Risks associated with management of subcontractors</b>	<ul style="list-style-type: none"> <li>Subcontracting proposals will be assessed by the TUEF Board against their capacity to meet the objectives of TUEF's Funding Agreement with the Australian Government.</li> <li>Subcontractors must enter into a formal agreement with TUEF, which will specify requirements for progress reporting and management of funding.</li> <li>Ongoing monitoring of subcontracting arrangements by the Compliance and Grants Manager ACTU.</li> <li>Payments to subcontractors will be subject to acceptance of satisfactory progress reports in accordance with the Funding Agreement.</li> </ul>	L	H	Very Good

## 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.

- A list of subcontractors is provided as part of this Outline Plan as follows:*

Subcontractor	Role/Responsibilities
	Delivery of TUEF PET Fund approved OHS courses to union delegates, organisers and specialists in Western Australia, on behalf of TUEF.
	To prepare and deliver up to seven 3-hour Organisational Governance seminars to union leaders nationally, subject to sufficient enrolment.

Please refer to Appendix B – TUEF PET 2017 Subcontractor Project – v2 for further detail regarding this project.

## 6 Budget

*Provide a comprehensive budget including:*

- *Itemised expenditure for 1 January – 31 December 2017;*
  - *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 C – draft TUEF PET Fund 2017 Budget**
  - Please refer to **Appendix D – General Outline of Expenditure**

Consistent with Clause 3.8 of the Funding Agreement any interest on the \$9m grant will be used for grant activities, in accordance with Clause 3.7 of the Agreement. TUEF also advises that that any income received for delivery of 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.

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

Evaluation of the performance of these activities against objectives will be undertaken through collection of quantitative and qualitative data, which will be evaluated against the delivery targets stated in Section 2.5 & 2.6 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 2017 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.

TUEF will continue to report outcomes of the annual Quality Indicator Survey required by the Australian Skills Quality Authority of Learner Engagement and Employer Satisfaction in relation to accredited Certificate IV courses.

#### ***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 **Tuesday 31 January 2017** to: Programme Manager, PET Fund, at the:

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

Appendix 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			2	
>Advocacy	Officials, Organisers & Industrial Officers		1			1		1			3	
Bargaining under the Fair Work Act	Officials, Organisers & Industrial Officers		1					1			2	
*Certificate IV in Work Health & Safety	WHS Specialists		1			1		1			3	
*Craft of Organising	Organisers							1			1	
^Delegates Online	Delegates									1	1	
Economics for Unionists	Delegates, Organisers, Union Researchers, Industrial Officers & Officials							1	1		2	
Economics for Unionists - Intensive	Delegates, Organisers, Union Researchers, Industrial Officers & Officials		1		1	1	1				4	
^Federal Right of Entry Laws	Officials									1	1	
#Indigenous Delegates Leadership Training	Delegates				4						4	
Lead Organiser Development Stage 1 - Residential	Lead Organisers		1								1	
Leading Campaigns	Lead Organisers & Campaigners							1			1	
*Leading Unions - Residential	Senior Officials		1								1	
Negotiation Skills for Organisers	Organisers		1								1	
Organising for Safer Workplaces	Organisers		1					1			2	
*Organising Foundations	New Organisers		1		1	1		1	1		5	
<*Organising Works Program (incorporating Certificate IV in Unionism & Industrial Relations)	New Organisers	1									1	
Public Speaking Skills	Organisers		1					1			2	
Strategic Industry and Corporate Research	Organisers, Union Researchers & Industrial Officers		1					1			2	
Training Skills for Union Educators	Union Educators		1								1	
Union Governance	Officials	2	2		2	2	2	2	2		14	
Working for Unions	Administrative & New Union Staff		1		1			1			3	
Workplace Bullying and Harassment	Officials & Organisers		1					1	1		3	
		<b>Total</b>	<b>3</b>	<b>17</b>	<b>0</b>	<b>9</b>	<b>6</b>	<b>3</b>	<b>15</b>	<b>5</b>	<b>2</b>	<b>60</b>

> **Advocacy** – the 2017 schedule will offer 3 occurrences of this course in NSW, VIC and QLD. Course dates are yet to be finalised with the specialist educator contracted for this course and do not appear on the enclosed 'Schedule By Date'. TUEF will provide DoE with an updated schedule when course dates are confirmed.

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

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

# **Indigenous Delegates Leadership Training** – TUEF plans to recruit a trainer to extend Indigenous Delegates Leadership Training, to be based in QLD, in the latter part of 2017. Course dates are not yet known and do not appear on the enclosed 'Schedule By Date'. TUEF will provide the department with an updated schedule when course dates are confirmed.

< **Organising Works Program** - In 2017 TUEF hopes to deliver the Organising Works program in the ACT. At the time of writing this program is not confirmed and is subject to sufficient enrolments. The summary above does not include continuing delivery of the three Organising Works programs that commenced in 2016 in NSW, VIC and QLD, and which have already been recorded in the **TUEF PET Fund 2016 Summary Report**. Course dates for the continuing 2016-17 programs are however listed in the enclosed 'Schedule By Date' for the department's information.



Appendix A - TUEF PET Fund Course Schedule and Course Descriptions 2017

DESCRIPTION	STATE	START DATE			END DATE		
		DAY	DATE	MONTH	DAY	DATE	MONTH
Delegates Online Education Program	Online	Sunday	1	January	Sunday	31	December
Federal Right of Entry Laws	Online	Sunday	1	January	Sunday	31	December
^Organising Works Course 5 - 2016 intake	VIC	Tuesday	31	January	Thursday	2	February
Organising Foundations - Part 1	WA	Wednesday	1	February	Friday	3	February
^Organising Works Course 5 - 2016 intake	NSW	Tuesday	7	February	Thursday	9	February
^Organising Works Course 5 - 2016 intake	QLD	Tuesday	7	February	Thursday	9	February
Union Governance	VIC	Wednesday	8	February	Wednesday	8	February
Union Governance	SA	Friday	17	February	Friday	17	February
Organising Foundations - Part 1	SA	Wednesday	22	February	Friday	24	February
Leading Unions - Week 1 (Residential) 2017 intake	NSW	Sunday	26	February	Friday	3	March
Organising Foundations - Part 2	WA	Monday	27	February	Tuesday	28	February
Economics for Unionists	VIC	Monday	27	February	Friday	3	March
Union Governance	TAS	Tuesday	28	February	Tuesday	28	February
Union Governance	NSW	Wednesday	1	March	Wednesday	1	March
Union Governance	QLD	Thursday	9	March	Thursday	9	March
^Organising Works Course 6 - 2016 intake	QLD	Tuesday	14	March	Thursday	16	March
Union Governance	WA	Thursday	16	March	Thursday	16	March
Organising Foundations - Part 2	SA	Tuesday	21	March	Wednesday	22	March
#Organising Works Course 1 - 2017 intake	ACT	Tuesday	21	March	Thursday	23	March
Certificate IV in WHS - Part 1	NSW	Tuesday	21	March	Thursday	23	March
^Organising Works Course 6 - 2016 intake	VIC	Tuesday	21	March	Thursday	23	March
Workplace Bullying and Harassment	WA	Tuesday	28	March	Tuesday	28	March
^Organising Works Course 6 - 2016 intake	NSW	Tuesday	28	March	Thursday	30	March
Union Governance	ACT	Thursday	30	March	Thursday	30	March
Economics for Unionists - Intensive	NSW	Wednesday	5	April	Thursday	6	April
Public Speaking Skills	NSW	Tuesday	11	April	Tuesday	11	April
Bargaining under the Fair Work Act	VIC	Tuesday	11	April	Thursday	13	April
#Organising Works Course 2 - 2017 intake	ACT	Wednesday	26	April	Friday	28	April
Advanced Recruitment Skills	NSW	Tuesday	2	May	Thursday	4	May
Certificate IV in WHS - Part 2	NSW	Tuesday	2	May	Friday	5	May
Workplace Bullying and Harassment	VIC	Wednesday	3	May	Wednesday	3	May
^Organising Works Course 7 (Residential) - 2016 intake	NSW	Sunday	7	May	Friday	12	May
Organising for Safer Workplaces	VIC	Tuesday	9	May	Wednesday	10	May
Working for Unions	NSW	Wednesday	17	May	Thursday	18	May
Economics for Unionists - Intensive	QLD	Tuesday	23	May	Wednesday	24	May
#Organising Works Course 3 - 2017 intake	ACT	Tuesday	23	May	Thursday	25	May
Strategic Industry & Corporate Research	NSW	Tuesday	30	May	Thursday	1	June
Certificate IV in WHS - Part 1	VIC	Tuesday	6	June	Thursday	8	June
^Organising Works Course 8 - 2016 intake	NSW	Tuesday	20	June	Thursday	22	June
^Organising Works Course 8 - 2016 intake	VIC	Tuesday	20	June	Thursday	22	June
^Organising Works Course 8 - 2016 intake	QLD	Tuesday	20	June	Thursday	22	June
#Organising Works Course 4 - 2017 intake	ACT	Tuesday	11	July	Thursday	13	July
Certificate IV in WHS - Part 2	VIC	Tuesday	11	July	Friday	14	July
Working for Unions	QLD	Wednesday	19	July	Thursday	20	July
Economics for Unionists - Intensive	TAS	Tuesday	25	July	Wednesday	26	July
Organising Foundations - Part 1	NSW	Tuesday	25	July	Thursday	27	July
Leading Unions - Week 2 (Residential) 2017 intake	VIC	Sunday	30	July	Friday	4	August
Union Governance	NSW	Tuesday	1	August	Tuesday	1	August
^Organising Works Course 9 - 2016 intake	QLD	Tuesday	1	August	Thursday	3	August
Organising Foundations - Part 1	VIC	Tuesday	1	August	Thursday	3	August
^Organising Works Course 9 - 2016 intake	NSW	Tuesday	8	August	Thursday	10	August
^Organising Works Course 9 - 2016 intake	VIC	Tuesday	8	August	Thursday	10	August
Union Governance	QLD	Wednesday	9	August	Wednesday	9	August
Training Skills for Union Educators	NSW	Monday	14	August	Thursday	17	August
Economics for Unionists	WA	Monday	14	August	Friday	18	August
#Organising Works Course 5 - 2017 intake	ACT	Tuesday	15	August	Thursday	17	August
Advanced Recruitment Skills	VIC	Tuesday	15	August	Thursday	17	August
Union Governance	SA	Wednesday	16	August	Wednesday	16	August
Leading Campaigns	VIC	Monday	21	August	Friday	25	August
Organising Foundations - Part 2	NSW	Wednesday	23	August	Thursday	24	August
Organising Foundations - Part 2	VIC	Tuesday	29	August	Wednesday	30	August
Organising Foundations - Part 1	QLD	Tuesday	29	August	Thursday	31	August
Union Governance	TAS	Tuesday	5	September	Tuesday	5	September
^Organising Works Course 10 - 2016 intake	QLD	Tuesday	5	September	Thursday	7	September
Bargaining under the Fair Work Act	NSW	Monday	11	September	Wednesday	13	September
^Organising Works Course 10 - 2016 intake	VIC	Tuesday	12	September	Thursday	14	September
#Organising Works Course 6 - 2017 intake	ACT	Tuesday	19	September	Thursday	21	September
^Organising Works Course 10 - 2016 intake	NSW	Tuesday	19	September	Thursday	21	September
Organising Foundations - Part 2	QLD	Tuesday	26	September	Wednesday	27	September

Appendix A - TUEF PET Fund Course Schedule and Course Descriptions 2017

DESCRIPTION	STATE	START DATE			END DATE		
		DAY	DATE	MONTH	DAY	DATE	MONTH
Union Governance	VIC	Thursday	28	September	Thursday	28	September
Public Speaking Skills	VIC	Tuesday	10	October	Tuesday	10	October
Union Governance	ACT	Tuesday	10	October	Tuesday	10	October
Workplace Bullying and Harassment	NSW	Tuesday	10	October	Tuesday	10	October
Union Governance	WA	Wednesday	11	October	Wednesday	11	October
Strategic Industry & Corporate Research	VIC	Wednesday	11	October	Friday	13	October
#Organising Works Course 7 - 2017 intake	ACT	Tuesday	17	October	Thursday	19	October
Certificate IV in WHS - Part 1	SA	Tuesday	17	October	Thursday	19	October
Lead Organiser Development Program - Residential	VIC	Sunday	22	October	Friday	27	October
Negotiation Skills for Organisers	NSW	Monday	23	October	Wednesday	25	October
Working for Unions	VIC	Tuesday	24	October	Wednesday	25	October
Craft of Organising - Part 1	VIC	Tuesday	31	October	Friday	3	November
Economics for Unionists - Intensive	SA	Wednesday	1	November	Thursday	2	November
#Organising Works Course 8 - 2017 intake	ACT	Tuesday	7	November	Thursday	9	November
Organising for Safer Workplaces	NSW	Tuesday	14	November	Wednesday	15	November
Leading Unions - Week 3 (Residential) 2017 intake	SA	Sunday	19	November	Friday	24	November
Certificate IV in WHS - Part 2	SA	Tuesday	21	November	Friday	24	November
Craft of Organising - Part 2	VIC	Tuesday	12	December	Friday	15	December

^ Organising Works Program 2016 intake- Indicates course dates for continuing delivery of the three Organising Works programs that commenced in 2016 in NSW, VIC and QLD.

# Organising Works Program 2017 intake - In 2017 TUEF hopes to deliver the Organising Works program in the ACT. At the time of writing this program is not confirmed and is subject to sufficient enrolments.

Appendix A - TUEF PET Fund Course Schedule and Course Descriptions 2017

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).
<b>Aboriginal Cultural Awareness and Bargaining Training</b>	Officials, Organisers and Delegates	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.
<b>Advanced Communication Skills</b>	Delegates	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.
<b>Advanced Educators' Course - Residential</b>	Union Educators	<p>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.</p> <p>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.</p> <p>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.</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.
<b>Advanced Negotiation Skills</b>	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>
<b>Advanced Recruitment Skills</b>	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.

Appendix A - TUEF PET Fund Course Schedule and Course Descriptions 2017

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).
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	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>
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	Delegates	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	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.

Appendix A - TUEF PET Fund Course Schedule and Course Descriptions 2017

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).
<b>Certificate IV in Work Health and Safety</b>	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.
<b>Commonwealth Work Health and Safety Entry Permit Holders</b>	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.
<b>Core Skills for Delegates</b>	Delegates	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.
<b>Craft of Organising</b>	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 an opportunity to update their knowledge of current theory and practice with respect to the role of an organiser, in the context of developing and maintaining co-operative and consultative processes in the workplace, engaging with employers and workers on workplace issues, facilitating outcomes that lead to improved fairness, safety and productivity in the workplace, particularly in the context of enterprise bargaining, and contributing to the successful operation of the workplace relations system.
<b>Delegates Online Education Program</b>	Delegates	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

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).
<b>Developing Workplace Leaders</b>	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.
<b>Economics for Unionists</b> formerly <i>Economics / Political Economy for Unionists</i>	Delegates, Organisers, Union Researchers, Industrial Officers & Officials	This 5-day course provides a comprehensive introduction to economics that will allow participants to more confidently analyse and respond to standard economic debates regarding competitiveness, the costs and benefits of private and public sector activity, the economic effects of unions and collective bargaining, productivity, government budgets, and more. By the end of the week participants will be familiar with major economic concepts, the role of labour in the economy, and alternative approaches to economic policy.  At the end of this course, participants will be able to: - Confidently analyse economic concepts and arguments - Understand the role of labour in the economy - Analyse economic policies and their alternatives	This course presents detailed discussion of 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.  This course includes specific content outlining concepts and case studies related to improving productivity in the workplace.
<b>Economics for Unionists - Intensive</b>	Delegates, Organisers, Union Researchers, Industrial Officers & Officials	This 2-day intensive version of the Economics for Unionists courses provides a basic overview of economic theory and policy, to assist participants to analyse and respond to standard economic debates regarding competitiveness, the costs and benefits of private and public sector activity, the economic effects of unions and collective bargaining, productivity and more.  At the end of this course, participants will have been introduced to, and be more confident in discussing: - Major economic concepts and arguments - Theories of the role of labour in the economy - Alternative approaches to economic policy	This course presents an overview of 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.  This course includes specific content outlining concepts and case studies related to improving productivity in the workplace.
<b>Fair Work Update</b>	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.

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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).
<b>Federal Right of Entry Laws</b>	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.
<b>Grievance Handling for Organisers</b>	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.
<b>Handling Grievances in the Workplace</b>	Delegates	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.
<b>Indigenous Delegate Leadership Training</b>	Delegates	<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.
<b>Labour Productivity and the Fair Work Act</b>	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>

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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).
<b>Lead Organiser Development Program - Residential or Non-Residential</b>	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.
<b>Leadership Seminars</b>	Senior Officials	Seminars and short courses for union leaders and senior officials, presenting current issues and trends in economic policy, theories of productivity, workplace relations, organisational management and culture, financial and organisational governance, and leadership skills and practice.	These seminars and short courses are delivered subject to demand and tailored to engage union leaders on 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.
<b>Leading Campaigns</b>	Lead Organisers & Campaigners	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.
<b>Leading Unions - Residential</b>	Senior Officials	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.  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.	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.
<b>Level 2 Delegates</b>	Delegates	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.



Appendix A - TUEF PET Fund Course Schedule and Course Descriptions 2017

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).
<b>Managing People Effectively</b>	Leaders and Supervisors	This 2-day course is for union leaders and others with responsibility for supervising union staff, and builds the skills necessary for the effective management of staff and the building of productive and capable organisations. The course considers the role of the manager; the impact of organisational structures and culture on behaviour; effective performance management; and how to build staff and organisational capacity through guidance and performance development.	The course provides union leaders and other supervisors of staff with the opportunity to develop their personnel management skills, to demonstrate and apply good leadership in the workplace, and improve the capability and productivity of their staff and union to contribute to the continuing successful operation of the workplace relations system.
<b>Media Skills for Union Officials</b>	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.
<b>Negotiation Skills for Delegates</b>	Delegates	<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 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>	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.
<b>Negotiation Skills for Organisers</b>	Organisers	This course builds skills for experienced organisers and officials who are involved in negotiating outcomes in grievances, disputes or bargaining. The course builds listening and negotiating skills, introduces negotiating theories, and assists participants to identify effective methods of planning and evaluating negotiations, to achieve a more cooperative approach to improving outcomes for all parties.	The course provides skills and knowledge that enable participants to engage and negotiate with employers and workers on workplace issues, including work organisation, the balance between work and life, safe, fair and productive workplaces, and the achievement of productivity outcomes in the context of enterprise bargaining.
<b>Organiser Development</b> <i>[for NT only]</i>	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.

Appendix A - TUEF PET Fund Course Schedule and Course Descriptions

COURSE	TARGET GROUP	COURSE DESCRIPTION	HOW DOES THE COURSE MEET THE OBJECTIVES OF THE PET FUND PROJECT? (as expressed in Parts A & B of the Purpose Statement of the TUEF PET Fund Funding Agreement 2012).
<b>Organising and Bargaining for Delegates</b>	Delegates	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.
<b>Organising for Safer Workplaces</b>	Organisers	<p>This course provides Organisers and Officials with the skills and knowledge to effectively communicate, organise and provide leadership on Work Health &amp; Safety (WHS) issues in Australian workplaces.</p> <p>The course covers the main WHS legislative and policy frameworks operating in Australia; an understanding of how unions have traditionally organised around WHS issues; an understanding of how legislation can assist in establishing health and safety structures and decision-making processes; and how to communicate and consult effectively with workers and employers around WHS issues</p>	The course provides experienced organisers with more advanced skills and knowledge required to effectively communicate and consult with employers and employees on matters of Work Health and Safety and to provide leadership in building safer, fairer and more productive workplaces.
<b>Organising Foundations</b>	New 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.

Appendix A - TUEF PET Fund Course Schedule and Course Descriptions 2017

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).
<b>Organising Works Program,</b> with option to obtain <i>Certificate IV in Unionism and Industrial Relations</i>	Organisers	<p>The Organising Works program trains new union organisers in the skills of organising, covering content and skills such as:</p> <ul style="list-style-type: none"> <li>• consultation and communication with workers and employers;</li> <li>• identifying and resolving issues of concern to workers;</li> <li>• developing leadership skills, and supporting the development of other leaders in the workplace;</li> <li>• bargaining and negotiation skills;</li> <li>• resolving grievances and disputes;</li> <li>• promoting workplace health and safety;</li> <li>• knowledge of the workplace relations system and laws; and</li> <li>• current economic and policy issues relevant to the workplace.</li> </ul> <p>The program includes a personalised development plan of workplace-based projects, including observation and practice of organising skills. This program also includes specific content outlining concepts and case studies related to improving productivity in the workplace.</p> <p>Participants may choose to submit for assessment a portfolio of evidence to achieve the nationally accredited Certificate IV in Unionism &amp; Industrial Relations (10157NAT) comprising 10 Units of Competency.</p>	<p>The program provides participants with a comprehensive understanding and practical skills of the workplace relations system and their role within that system, including:</p> <ul style="list-style-type: none"> <li>- developing and maintaining co-operative and consultative processes in the workplace;</li> <li>- engaging with employers and workers on workplace issues;</li> <li>- developing leadership skills, and supporting the development of other leaders in the workplace;</li> <li>- facilitating outcomes that lead to improved fairness, safety and productivity in the workplace, particularly in the context of enterprise bargaining; and</li> <li>- contributing to the successful operation of the workplace relations system.</li> </ul>
<b>Public Speaking Skills</b>	Organisers	<p>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.</p>	<p>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.</p>
<b>Recruiting at Inductions</b>	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>	<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.</p>

Appendix A - TUEF PET Fund Course Schedule and Course Descriptions 2012

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).
<b>Social Media Skills</b>	Delegates, Organisers and Officials	This course builds skills to increase the effectiveness of communications between union staff and workers, to facilitate more inclusive decision-making and representation in workplaces. The course reviews the effective use of social media for workplace communication by delegates, organisers and officials, as well as more traditional means of communication through one to one conversations, site meetings, mass meetings, e-bulletins, , flyers, and magazine articles. We explore how participants can use Facebook, Instagram, Twitter and online forums to support workers' conversations and representation. We showcase good practice across the union and non-profit sectors from an organising perspective.	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.
<b>Strategic Industry &amp; Corporate Research</b>	Organisers, Union Researchers & Industrial Officers	This course is for union researchers, organisers and officials who want to advance their strategic industry and corporate research skills.  The course uses case studies to introduce participants to strategic industry and corporate research plans, methods, tools and sources of information. Topics include industry mapping, identifying key decision makers and how to influence their decisions, reading financial reports and identifying key stakeholders in campaigns.	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.  This course includes specific content outlining concepts and case studies related to improving productivity in the workplace.
<b>Training Skills for Union Educators</b>	Union Educators	This course is designed for union 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.	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.
<b>Union Governance</b>	Officials	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.  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.	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 2017

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).
<b>Union Governance Train the Trainer</b>	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.
<b>WHS for Delegates</b>	Delegates and Workplace Representatives	<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>	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.
<b>Working for Unions</b>	Administrative & New 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.
<b>Workplace Bullying and Harassment</b>	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.
<b>Workplace Union Leaders</b>	Delegates	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.

## A Delivery of WHS training to Delegates, Organisers and Specialists in Western Australia

### Background

1. TUEF currently offers the following Work Health & Safety (WHS) courses nationally with the support of the TUEF PET Fund Project:
  - WHS for Delegates
  - Organising for Safer Workplaces
  - Certificate IV in WHS
2. The ACTU Organising Centre currently employs two specialist educators based in Victoria, who deliver WHS courses nationally on behalf of TUEF for the PET Fund Project.
3. Opportunities to build demand for and deliver WHS courses in Western Australia have been very limited during the National Workplace Education Program and the PET Fund Project.
4. The primary barrier to TUEF building demand for and delivering WHS courses in Western Australia is the geographical distance between the location of appropriately qualified TUEF educators and unions based in WA.
5. To address this gap in national training provision TUEF proposes in 2017 to commence a 3 year subcontracting project with UnionsWA (trading as 'Unity Training Services') to deliver approved WHS courses to unions in Western Australia.
6. Unity Training Services is a Registered Training Organisation owned by UnionsWA which offers a range of State and Commonwealth health and safety courses to employers and unions in WA.

### Project Proposal and Governance

7. The scope of the proposed project is summarised in the table below.

<b>Subcontractor</b>	<b>Unions WA (trading as Unity Training Services)</b>
<b>Project</b>	<b>WHS training for Delegates, Organisers and Specialists in Western Australia</b>
<b>Description</b>	To build demand for and deliver TUEF PET Fund-approved WHS courses: <ul style="list-style-type: none"> <li>• WHS for Delegates</li> <li>• Organising for Safer Workplaces</li> <li>• Certificate IV in WHS</li> </ul>
<b>State / Location</b>	Western Australia (metro and regional)
<b>Target Group / Industry</b>	Target Group: Delegates, Health and Safety Representatives, Organisers, and WHS Specialists  Industry: All Sectors
<b>Estimated No. of Participants</b>	Minimum of 54 participants
<b>Funding (excl. GST)</b>	) ) )

8. TUEF notes that UnionsWA charges participant fees for its courses. All fees charged by Unions WA for attendance at PET Fund courses will be reinvested in the program, consistent with the TUEF PET Fund Funding Agreement.
9. UnionsWA will also apply TUEF's evaluation framework for collection of participant feedback.

10. Subject to the department's approval of this proposal, TUEF proposes to apply governance arrangements to manage this project consistent with arrangements for subcontractor projects previously established under the National Workplace Education Program.
- **Project Commencement** – will occur on signing of Funding Agreement between TUEF and UnionsWA (trading as Unity Training Services), subject to prior departmental approval of the **TUEF PET Fund 2017 Outline Plan**.
  - TUEF will ensure the Funding Agreement with UnionsWA reflects the terms of the TUEF PET Fund Funding Agreement.
  - A copy of the signed Funding Agreement will be provided to the department at the earliest opportunity, consistent with clause 7.4 of the Funding Agreement for the PET Fund Project between TUEF and the Australian Government.
  - **Six-Monthly Progress Reports** of education activity and financial reporting, including Certificate of Acquittal, will be required of UnionsWA by 21 July and 21 January each year.
  - **Audited Annual Financial Statements** will be required of UnionsWA annually.
11. It is proposed milestone payments will be made annually as follows, consistent with the proposed project commencement and reporting arrangements outlined above, and contingent upon acceptance by TUEF and the department of satisfactory and timely progress reports:
- Year 1 - 2017**
- 20% on signing of agreement, subject to departmental approval of **TUEF PET Fund 2017 Outline Plan**
  - 50% on acceptable 1st Progress Report
  - 30% on acceptable 2<sup>nd</sup> Progress Report and audited statements
- Year 2 - 2018**
- 20% on departmental approval of **TUEF PET Fund 2018 Outline Plan**
  - 50% on acceptable 3rd Progress Report
  - 30% on acceptable 4th Progress Report and audited statements
- Year 3 - 2019**
- 20% on departmental approval of **TUEF PET Fund 2019 Outline Plan**
  - 50% on acceptable 5th Progress Report
  - 30% on acceptable 6th Progress Report and audited statements
12. Project outcomes and reporting data, including education activities and financial reporting, will be included in TUEF's PET Fund Summary Reports due 31 January each year for the preceding January –December 12-month reporting period.

## B. National Delivery of Leadership Seminars – Organisational Governance

### Background

1. In 2016 TUEF piloted a Leadership Seminar on Organisational Governance to ACTU staff, addressing principles of organisational governance, accountability and probity (pp. 7-8 TUEF PET Fund 2016 Summary Report).
2. The provider of the pilot seminar was Andrew Whittaker, FCA GAICD. Andrew developed and delivered the seminar content and was paid from PET Fund Grant Monies. Total payment for preparation and delivery of 3 pilot seminars (\$10,000).
3. TUEF proposes to subcontract Andrew in 2017 to deliver up to seven further Leadership Seminars in Organisational Governance to union leaders nationally, as part of TUEF's continuing development of leadership skills training.
4. The seminar differs from the Fair Work Commission-approved **Union Governance** course, required under the *Fair Work (Registered Organisations) Act 2009*, as it addresses the broader values, principles and benefits of effective organisational governance systems, rather than the specific statutory obligations of those with financial decision-making responsibilities.
5. Andrew has 40 years' experience in audit, management consulting and executive management and has held partner and director roles at KPMG, Coopers & Lybrand and PwC, amongst others.
6. TUEF considers it both necessary and beneficial to engage an external, experienced governance professional to deliver the seminars, to engage union leaders from a position of authority and expertise in organisational governance, informed by best practice in the commercial, public and not-for-profit sectors.
7. A TUEF Educator co-train each of the seminars with Andrew, to inform TUEF's continuing development of leadership skills and governance training and to facilitate professional development of TUEF Educators.

### Project Proposal and Governance

8. The scope of the proposed project is summarised in the table below.

<b>Subcontractor</b>	A G Whittaker Pty Ltd
<b>Project</b>	<b>Leadership Seminars – Organisational Governance</b>
<b>Description</b>	To prepare and deliver up to seven 3-hour Organisational Governance seminars to union leaders nationally, subject to sufficient enrolment.
<b>State / Location</b>	ACT, NSW, QLD, SA, TAS, VIC, WA
<b>Target Group / Industry</b>	Target Group: Union Leaders Industry: All Sectors
<b>Estimated No. of Participants</b>	Minimum of 105 participants
<b>Funding (excl. GST)</b>	\$10,000, plus reimbursement of reasonable expenses (as provided in ATO TD 2016/13 Table 1 and taxi fares).

9. Andrew will work as directed by the TUEF Project Director and by the TUEF Educator attending each seminar. All reporting of training outcomes will be coordinated by TUEF.
10. Training outcomes, including participant feedback and TUEF's evaluation of post-training outcomes, will be included in the **TUEF PET Fund 2017 Summary Report**.



## Draft Budget - TUEF Productivity Education and Training (PET) Fund Project - Jan to Dec 2017

All figures are GST exclusive

	2017 Budget	Notes
	\$8,501,334	Anticipated balance as at end of December 2016 at 25/01/2017 (pre-audit)
<b>Income</b>		
TUEF Grant Money	\$1,055,556	Annualised accounting allocation of PET Fund Grant Monies.
Interest Received	\$225,000	Projected interest on term deposits. Interest earned on Grant Monies must be used for grant-related activities in accordance with Clause 3.7 of the Funding Agreement.
<b>Total Grant Monies and Interest</b>	<b>\$1,280,556</b>	
<b>Education Income</b>		
Scheduled Training	\$223,009	Income projected is based on achieving 70% delivery of multi-union scheduled training courses, with minimum 8 participants per course. (Excludes projected income from residential scheduled courses, Organising Works Programs and Online courses. Income for those activities is shown separately below.)
Lead Organiser Development Course - Residential	\$21,818	Projected income from delivery of 1 x Lead Organiser Development residential course in 2017, with minimum 8 participants.
Leading Unions Course - Residential	\$81,818	Projected income from delivery of 1 x Leading Unions course in 2017, delivered over 3 separate weeks, with minimum 10 participants.
Non Scheduled Training	\$150,227	Income projected is based on achieving 80% delivery of 80 single-union non-scheduled training courses, with minimum 8 participants per course.
Online Training	\$88,500	Anticipated income from delivery of Federal Right of Entry Laws (projected 900 participants) and Delegates Online Education Program (projected 30 participants).
Organising Works Program	\$128,309	Projected income from (1) delivery of remainder of 2016-17 program with 29 participants in 3 states, with 60% of program income allocated to 2017; and (2) potential delivery of 2017 program in ACT with minimum 10 participants. This program is not yet confirmed.
<b>Total Education Income</b>	<b>\$693,682</b>	
Reimbursements	\$25,000	Includes reimbursements for Education Expenses and for a proportion of TUEF WA Global Expenses.
<b>TOTAL INCOME</b>	<b>\$1,999,238</b>	

Appendix C - TUEF PET Fund 2017 Budget

	2017 Budget	Notes
<b>Expenses</b>		
<b>Education Expenses (other than staffing costs)</b>		
Training Expenses	\$69,700	Provision for training expenses other than travel. Provision is significantly greater than 2016 due to (1) \$24,000 provision for external contract trainers for up to 6 x Economics for Unionists courses and up to 6 x Leadership Seminars in Organisational Governance (2) \$14,700 provision for change in training venue in Sydney (*refer explanatory note below) and \$6,000 provision for training venue hire in Queensland for pilot Indigenous Delegates Leadership project (3) \$22,000 provision for external consultancy expertise for development of Disability Awareness and Inclusion Modules (4) additional \$3,000 provision for unanticipated training expenses.
Lead Organiser Development Course	\$17,144	Projected accommodation and travel expenses for this residential course, with minimum 8 participants and 2 educators.
Leading Unions Course	\$52,319	Projected accommodation and travel expenses for this 1 x 3 weeks residential course, with minimum 8 participants and 2 educators.
Online Training	\$17,700	
Organising Works Program Expenses	\$48,800	Projected travel expenses for participants and educators attendance at residential component of the 2016-17 Organising Works Program. It is not anticipated a residential will be included in the proposed 2017 delivery of the program in the ACT.
<b>Total Education Expenses</b>	<b>\$205,662</b>	
<b>Administration</b>		
ACTU OECC Overhead Fees	\$179,350	Proportion of overhead fees based on distribution of EFT between PET and OECC. Includes IT costs, Office Equipment leases, Office Supplies and Stationery, Postage, Insurances, Printing, Photocopying and Marketing Materials.
Occupancy Costs - SA, VIC, NSW, WA	\$99,860	Lease and outgoings of office space for staff located in NSW, SA, WA & VIC. Based on distribution of EFT between PET and OECC.
Advertising	\$0	
Audit Fees	\$5,600	Audit performed at end of financial year.
Accounting Fees	\$20,400	

	2017 Budget	Notes
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	Provision for production of revised Wall Planner/Calendar, Online Promotion and Course Guide (revised format tbc).
Sundries	\$100	
Teleconferencing	\$0	TUEF is now using online team meeting apps to facilitate video & teleconferencing.
<b>Total Administration</b>	<b>\$334,810</b>	
Travel & Accommodation	\$56,000	Air fares, Accommodation, Travel Expenses and Travel Allowances to undertake interstate course delivery and curriculum development. Increased in 2017 to provide for (1) expansion of Indigenous delegate training in Far North QLD; and (2) potential delivery of Organising Works in ACT requiring Educator travel from NSW & VIC.
Staffing Costs	\$2,197,125	Includes salaries, oncosts and professional development for delivery of the TUEF PET Fund Project in 2017. Salary provision is increased from 2016 to provide for up to 4 x12-month Educator contracts to pilot 1.0 EFT Indigenous trainer position in QLD and 3 x 1.0 EFT educator/organisers nationally for increased multi-union delegates training nationally from mid-2017.
Subcontractor Program		
<b>Total Expenses</b>	<b>\$2,853,597</b>	
<b>Net Income/expenditure</b>	<b>-\$854,359</b>	Estimated draw down of grant in 2017, additional to accounting allocation
	<b>\$6,591,419</b>	<b>Expected balance at end of December 2017</b>

\* NSW training venue - TUEF has for many years used a training room located at UnionsNSW for courses delivered in Sydney. Course evaluations in 2016 indicated the training facilities no longer met trainers or participants' expectations. While UnionsNSW has undertaken some upgrade to the training room, TUEF has determined to use alternate training facilities located at the nearby MUA offices for the foreseeable future, due to improved layout for small group training and greater internet connectivity.

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 <sup>‡</sup>	2013-2014 <sup>‡</sup>	2014-2015 <sup>‡</sup>	2015-2016 <sup>‡</sup>	Jul-Dec 2016 <sup>α</sup>	2017	2018	2019	2020	2021	2022
Balance at beginning of period* <sup>#</sup>	\$10,000,000	\$10,189,186	\$10,122,454	\$10,005,802	\$8,985,392	\$8,501,334	\$6,591,419	\$5,072,684	\$3,812,182	\$2,217,017	\$577,985
Plus income (including interest) <sup>^</sup>	\$299,887	\$386,074	\$344,036	\$298,189	\$125,027	\$225,000	\$181,264	\$139,499	\$104,835	\$60,968	\$28,395
Less Net Expenditure <sup>#</sup>	\$110,701	\$452,806	\$460,688	\$1,318,599	\$609,085	\$2,134,915	\$1,700,000	\$1,400,000	\$1,700,000	\$1,700,000	\$606,380
Balance at end of period <sup>#</sup>	\$10,189,186	\$10,122,454	\$10,005,802	\$8,985,392	\$8,501,334	\$6,591,419	\$5,072,684	\$3,812,182	\$2,217,017	\$577,985	\$0

<sup>‡</sup> Represents actuals for the 2012-13, 2013-14, 2014-15 and 2015-16 financial years, post-audit.

<sup>α</sup> Represents recorded income and expenditure for the July to December 2016 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.

<sup>^</sup> Clause 3.8 of the Funding Agreement provides that any interest earned by TUEF on the Funds "must be used diligently and for the sole purpose of the Project...". Interest earned to date is represented in the relevant columns. Interest that may be earned and reinvested for Project purposes in remaining years of the program can only be estimated at this time.

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

Projected Net Expenditure for 2017 is significantly greater than that projected in the out years due to provision for additional short-term training contracts for extension of Indigenous Delegate Leadership Training in QLD, and increased delegate development nationally, as detailed in the **TUEF PET Fund 2017 Outline Plan**. The national delegate development project is currently in the scoping phase and TUEF is not able to model corresponding income in the draft budget or this General Outline of Project Expenditure at this stage.

Projected Net Expenditure for 2019 is lower than that projected in 2018, 2020 and 2021 due to anticipated impact of scheduled federal election campaign on demand for union training.