

Productivity Education and Training Fund (PET Fund)

The Union Education Foundation

Outline Plan

From: 1 July 2013 to 31 December 2013

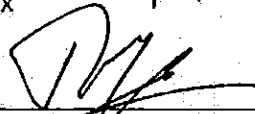
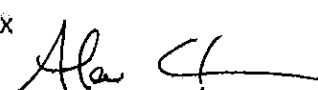
Approval of this Outline Plan		Signature and Date
The Union Education Foundation	Delegated: Tim Lyons Director TUEF / Project Director	<date> 14/8/2013 x 
Department of Education Employment and Workplace Relations	Delegated: Branch Manager responsible for program	<date> x  17/9/13

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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 July – 31 December 2013. It establishes:

- what the project is to deliver from 1 July – 31 December 2013;
- critical dates and project schedule;
- any changes to the Milestones and Deliverables Plan in how the project will be governed – who is responsible for what; and
- any changes to the Milestones and Deliverables Plan 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 Education, Employment and Workplace Relations (DEEWR) 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 Background

The Australian Government through the Department of Education, Employment and Workplace Relations (DEEWR) has entered into a Funding Agreement with The Union Education Foundation (TUEF), for provision of Grant Monies of \$11,000,000 (inclusive of GST) from the Productivity, Education and Training Fund (the PET Fund). The term of the Agreement is from 29 June 2012 to 30 June 2022.

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

Through the Agreement, TUEF commits to helping achieve the program through conduct of the Project that encompasses:

- the role that co-operative and consultative processes and policies play in generating improved productivity at the workplace and practical measures that give effect to these issues;
- providing skills to employee representatives to engage with employers and employees on productivity, work organisation, the balance between work and life and the generation and sharing of productivity gains;
- the role that productivity issues play in enterprise bargaining;
- the importance of leadership in building safe, fair and productive workplaces, how employee representatives can contribute to good leadership in workplaces, and training leaders;
- the continuing successful operation of the workplace relations system.

The Agreement builds on the continuing programs initiative under the National Workplace Education Program (NWEPP) that facilitated the initial period of operation of the Fair Work Act 2009.

The planned project deliverables for the period 1 July – 31 December 2013 are outlined below and are intended to meet the objectives of the Agreement.

2.2 Education Activities

Education Activities for the period 1 July 2013 – 31 December 2013 will focus on delivery of Union Governance training required to be undertaken by specified union officers by end of 2013.

The *Fair Work (Registered Organisations) Amendment Act 2012* requires all union officers with financial decision-making responsibilities to undertake Fair Work Commission-approved training in the area of Financial Governance within 6 months of June 29, 2013, ie by 29 December 2013.*

In June 2013 the Commission approved a one-day Union Governance training course, designed on behalf of TUEF to meet the requirements of the Act. This course is being delivered to affiliates as a Train the Trainer course in the first instance and will then be offered to single unions requiring in-house delivery. The course meets the objectives of the project through development of leadership skills that can contribute towards building safe, fair and productive workplaces, and enabling employee representative to contribute to and demonstrate good leadership in workplaces.

In July 2013 the ACTU Organising Centre recruited a Union Governance Education Coordinator to implement the Union Governance training program between July and December 2013.

***NOTE:** As indicated below in *Section 4.2 - Risk Management* of this Outline Plan, while Union Governance training is a statutory requirement, at the time of writing some uncertainty has arisen regarding the statutory period for attendance and completion of this training due to recent amendment of the relevant legislation. This may affect achievement of course delivery and participation targets. The ACTU is consulting with the Fair Work Commission to obtain definitive advice regarding the statutory period for attendance and completion of Union Governance training to enable action to be taken to mitigate this risk.

2.2.1 Multi Union (Scheduled Training)

The Union Governance Train the Trainer course will be the sole Multi Union (Scheduled Training) education activity in this period.

The course covers four main components: the legal context of the financial governance changes; conflict of interest and disclosure of financial interests; financial management issues, and; reading and understanding financial reports.

On completion of the course, participants will be provided with certificates which will enable them to demonstrate compliance with the Act. Where possible, Trainers certified by the course will in turn deliver the course to their own union officers. Where that is not possible, ACTU Educators with certification are able to deliver courses to individual unions (refer *section 2.2.2 Single Union (Non-Scheduled Training)* below).

Scheduling of courses is responsive to market conditions. TUEF will offer as many courses as possible, understanding that some may be consolidated and/or cancelled. To ensure the most effective use of funding TUEF has set a minimum number of 8 participants for each course. This will only be waived by the Project Manager if the training is deemed to be important in meeting key objectives.

TUEF may receive requests to run courses in addition to those outlined in *Appendix A – Activities Course Schedule and Course Descriptions 2013*. Any such additional activity will be included in Summary Reports of activities required under Clause 11.1 of the Funding Agreement (Summary Reports).

Multi Union (Scheduled Training) courses are open to all unions, targeting all industries. A summary of industries reached will be included in Summary Reports.

Refer Appendix A – Activities Course Schedule and Course Descriptions 2013.

2.2.2 Single Union (Non Scheduled Training)

It is anticipated that Multi Union (Scheduled Training) will form the majority of education activity delivered in this period, given the capacity for transfer of skills inherent in the Train the Trainer model described in section 2.2.1 - Multi Union (Scheduled Training) above.

However, where unions do not have capacity to participate fully in the Train the Trainer model, ACTU Educators with certification are able to deliver Union Governance training to individual unions, subject to demand.

It is not possible to estimate demand accurately, but TUEF predict and have budgeted for approximately 8 days of this type of training. Actual training carried out will be included in Summary Reports.

Refer to Appendix A – Activities Course Schedule and Course Descriptions 2013.

2.3 Scope / Research Phase 1

The Milestones and Deliverables Plan made a commitment to completion of the Scoping and Research Phase 1 of the project by 31 October 2013.

As reported previously in the TUEF PET Fund Summary Report for the period 1 January 2013 – 30 June 2013 (the Summary Report), the Scoping and Research Phase 1 has commenced and identified the following priority areas of work:

- Fair Work Act 2009
- Union Governance – Education of Officers
- New Priority Curriculum – Leadership and Productivity.

Proposed curriculum review and development activities in these areas are outlined below in sections 2.4 – 2.7. The outcomes of these activities and recommended options and priorities for delivery of the Project will be submitted for approval to the General Meeting of the TUEF Board in November 2013.

2.4 Curriculum Review and Development – Fair Work Act 2009

The Milestones and Deliverables Plan made a commitment to curriculum review and development in response to the review of the Fair Work Act 2009, to ensure curricula reflect any consequential changes to industrial relations laws by 31 March 2013.

The following activities were commenced in the first half of 2013, but not completed pending final passage of relevant amendments to the Act:

- a) The Delegates Guide has been updated to reflect recent legislative amendments and will be reprinted once revised content is approved.
- b) The Fair Work Update one day course is also to be reviewed to reflect recent legislative amendments.

2.5 Curriculum Review and Development – Union Governance – Education of Officers

As reported previously in the Summary Report TUEF has completed development and commenced delivery of Union Governance training required under the Fair Work (Registered Organisations) Amendment Act 2012.

In this period TUEF will develop curriculum content, systems and processes for online delivery of Union Governance training. Draft course material will be prepared for consideration by the Fair Work Commission by 31 December 2013, for subsequent pilot and delivery in 2014.

2.6 Curriculum Review and Development – New Priority Curriculum – Leadership and Productivity

The Milestones and Deliverables Plan made a commitment to curriculum review and development in new priority areas such as productivity and leadership development, by **31 October 2013**.

New priority curriculum development activities for this period include:

- a) **Leadership Seminars** - curriculum development will identify training content of priority interest to current and future union leaders, which can be presented in an intensive, short format so as to meet market demand and participant availability.
Proposed Seminar Topics: (these may be added to following consultation with unions)
 - Productivity & Wages Share
 - Sustainable Growth and Leadership
 - Developing Workplace Leaders
- b) **Training Skills as Certificate IV in Training and Assessment** - curriculum learning guides and assessment tasks were developed in the first half of 2013 with a view to offering this course as an optional addition to the Training Skills for Union Educators course. The new resources were piloted in June and the optional accredited component will be offered in a scheduled Training Skills for Union Educators Course planned for October 2013.
- c) **Member Educator Development**, with a focus on identifying and supporting leaders in workplaces - TUEF delivered the Certificate IV in Training and Assessment to MUA Workplace Leaders in early 2013, following a direct request. In this period TUEF will engage with other unions to establish demand for similar targeted delivery to leadership groups, with a view to delivery in 2014.
- d) **Domestic Violence Agreement Clause training for Delegates and Negotiators** - As identified in the Australian Domestic and Family Violence Clearinghouse (ADFVC) project publication "Domestic Violence and the Workplace: Employee, Employer and Union Resources" it has been estimated that by 2021-22 the production-related costs of domestic violence in Australia will rise to \$609 million. TUEF is exploring existing training offered by the Australian Domestic and Family Violence Clearinghouse, and intends to design a course in this period that will highlight the productivity and workplace impacts of domestic violence.
- e) **Workplace Bullying** – As reported in the NWEF Sixth Progress Report, amendments to the *Fair Work Act 2009* and current consideration by Safe Work Australia of a draft model Work Health and Safety Code of Practice for Preventing and Responding to Bullying will necessitate review of TUEF's proposed Workplace Bullying and Harassment course. The Productivity Commission has estimated the total cost of workplace bullying in Australia as between \$6 billion and \$36 billion annually. TUEF intends to continue curriculum review and course development in this period within the context of the objectives of the PET Fund.
- f) **Centre for Workplace Leadership** - TUEF is formalising a relationship with the newly established Centre for Workplace Leadership at the University of Melbourne. A particular focus will be leveraging research on contributors to productivity and higher performing workplaces, as a basis for ongoing review and development of TUEF curricula consistent with project objectives.
- g) **Productivity Research and Curricula Review** – In addition to engaging with the Centre for Workplace Leadership, TUEF will engage with other unions and expertise in the higher education sector to identify and review current research and curricula regarding productivity in the workplace.

2.7 Curriculum Review and Development – Planning and Development Phase 2

The Milestones and Deliverables Plan made a commitment to commencement of Planning and Development Phase 2 of the project from November 2013, for completion in 2014.

The scope and content of Phase 2 of the project will be determined by the TUEF Board in November 2013, following consideration of the outcomes of Scoping and Research Phase 1 and Curriculum Development and Review activities outlined above in sub-sections 2.3 – 2.6.

2.8 Delivery Targets

Indicator	Delivery Target*
Scheduled Training	
Delivery of Courses	Achieve 70% delivery of scheduled training courses.
Participation	Achieve an overall attendance target of 146 participants for scheduled training courses, based upon the minimum participation number of 8 and delivery of 70% of scheduled training.
^Participant Evaluation	Achieve 80% participation satisfaction rating of 4 or above as measured by the Participant Evaluation Form for scheduled training using a scale 1-5 (1 being poor and 5 being excellent).
Non-Scheduled Training	
Delivery of Courses	Achieve 80% delivery of anticipated non-scheduled training courses
Participation	Achieve an overall attendance target of 51 participants for scheduled training courses, based upon the minimum participation number of 8 and delivery of 80% of non-scheduled training.
^Participant Evaluation	Achieve 80% participation satisfaction rating of 4 or above as measured by the Participant Evaluation Form for scheduled training using a scale 1-5 (1 being poor and 5 being excellent).
Curriculum Review and Development (sections 2.3 to 2.7 of this Outline Plan)	Completion of activities by Milestone date.
#Geographic Coverage	Course availability and delivery in all states and territories (subject to demand)
#Industry Coverage	Course availability and delivery across broad range of industries (subject to demand)

*Proposed Delivery Targets are consistent with those currently applied under the NWEF Project. This approach does not assume courses currently delivered under NWEF will automatically transition

to delivery under PET in future. It does, however, facilitate long-term collection of comparative data for the Indicators of Course Delivery, Participation, Participant Evaluation, and Geographic and Industry Coverage across the suite of courses delivered, whether funded under the NWEF or the PET Fund.

^ All course participants will be asked to complete an **Evaluation** Questionnaire specific to the training provided and the context of Project. As part of the evaluation process participants will be followed up after training using a phone survey evaluation tool. Necessary modifications and improvements will be made on the basis of analysis of evaluations and survey data, and will be embedded into project planning and delivery.

#Geographic and Industry Coverage

- TUEF has allocated training resources in NSW, VIC, QLD, WA, SA, and TAS
- The recently appointed Union Governance Education Co-ordinator and other training resources can provide training in other areas on demand.
- Geographic coverage achieved will be reported as Metro, Regional and Remote, subject to demand.
- Industry coverage will be reported against the ANZSIC classification at the Divisional level (broadest level).

3 Governance

Describe any proposed changes to Governance arrangements outlined in the Milestones and Deliverables Plan in regard to the means by which:

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

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

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

- Milestones as agreed in the Milestones and Deliverables Plan; and
- Delivery Targets proposed in section 2.8 above.

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

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

Provide:

- Updated contact details of managerial or specified personnel.

Managerial and Specified Personnel	Role/Responsibilities	Contact Information
Tim Lyons Assistant Secretary ACTU Director TUEF	Role: Project Director Responsibilities: Provides project oversight and direction on behalf of the TUEF Board.	ACTU Level 6, 365 Queen Street Melbourne VIC 3000
Director ACTU Organising Centre	Role: Project Manager Responsibilities: <ul style="list-style-type: none"> • Accountable to the TUEF Board and Project Director for the delivery of the project in accordance with the Funding Agreement; • Primary point of contact on the project and responsible for accepting notices on behalf of TUEF. 	ACTU Organising Centre Level 4, 365 Queen Street Melbourne VIC 3000
Assistant Director ACTU Organising Centre	Role: Project Management Support Responsibilities: <ul style="list-style-type: none"> • Provides project management support to the Project Manager; • Day-to-day oversight of the Union Governance Education Co-ordinator 	ACTU Organising Centre Trades Hall Building Level 3, 4-10 Goulburn Street, Sydney, NSW 2000
Compliance and Grants Manager ACTU Organising Centre	Role: Project Officer Responsibilities: <ul style="list-style-type: none"> • Developing, implementing and managing administrative and financial systems to support the Project in accordance with the Funding Agreement; • Provides project management support to the Project Manager. 	ACTU Organising Centre Level 4, 365 Queen Street Melbourne VIC 3000
Union Governance Education Co-ordinator ACTU Organising Centre	Role: Project Support Responsibilities: <ul style="list-style-type: none"> • Management and reporting on Union Governance training program from July to December 2013. 	ACTU Organising Centre Trades Hall Building Level 3, 4-10 Goulburn Street, Sydney, NSW 2000

Managerial and Specified Personnel	Role/Responsibilities	Contact Information
<p>Project Team ACTU Organising Centre</p>	<p>Role: To provide specific skills and expertise as required.</p> <p>Project team members include:</p> <ul style="list-style-type: none"> • Educators ACTU Organising Centre. Responsible for delivery of training courses and reporting on outcomes and evaluations. • Educators and Online staff, ACTU Organising Centre. Responsible for curriculum development and delivery. • General Manager, ACTU, and / or representative. Responsible for providing financial management advice and the primary contact for the finance team. • Administration & Office Coordinator, ACTU Organising Centre. Responsible for business processes and the primary contact for administrative processes. 	

4 Risk Management

Provide any updates to your risk management strategy in the Milestones and Deliverables Plan including any new risk you have identified.

1. Identified Risks

Identified Risk in Milestones and Deliverables	Comments on effectiveness of risk management
<p>Risk of mismanagement or fraud associated with the funds</p>	<p>Controls are in place and effective, and include:</p> <ul style="list-style-type: none"> • Maintenance of appropriate financial management systems • Regular financial reporting to the Project Manager, including P&L vs. Budget and Balance Sheets • Accounts are audited annually by an independent auditor • Progress reports are provided to the TUEF Board outlining project and funding activities
<p>Risks associated with management of subcontractors</p>	<p>TUEF will not be engaging subcontractors for this project during this period</p>

2. Amendments to Risk Management Strategy

Please advise DEEWR of any risks that have emerged during this reporting period that were not identified in the Milestones and Deliverables Plan.

Risk	Management Strategy	Likelihood (H/M/L)	Impact (H/M/L)	Control Rating (Poor/Good/Very Good)
<p>Insufficient attendance at scheduled training, affecting course delivery and participation</p> <p>Contributing Factor: While Union Governance training is a statutory requirement, at the time of writing some uncertainty has arisen regarding the statutory period for attendance and completion of courses, due to recent amendment of the relevant legislation.</p>	<ul style="list-style-type: none"> • Consult with the Fair Work Commission to obtain definitive advice regarding statutory period for attendance and completion Union Governance training. • Advertise courses and confirmed statutory requirement through all internal and external networks. • Re-schedule courses with low demand, to meet market need. • Schedule additional courses, subject to market demand. 	M	H	Good
<p>Staffing availability for scheduled training</p>	<ul style="list-style-type: none"> • Recruitment of dedicated resource (Union Governance Training Co-ordinator) to manage Union Governance training program from July to December 2013. • TUEF has allocated training resources in NSW, VIC, QLD, WA, SA, and TAS • The Union Governance Education Co-ordinator and other training resources can provide training in other areas on demand 	L	H	Very Good

Risk	Management Strategy	Likelihood (H/M/L)	Impact (H/M/L)	Control Rating (Poor/Good/Very Good)
<p>Education content not of consistent high quality</p>	<ul style="list-style-type: none"> • Professional development for staff • Professional mentoring for educators • Course Evaluations and Phone Survey used to review programs • Attendance at Training Skills and Advanced Training Skills for Union Educators 	L	H	Very Good
<p>Staffing availability for Curriculum Development and Review</p>	<ul style="list-style-type: none"> • Identification of tasks and commitment of required skills and expertise in ACTU Organising Centre workplan. • Identification of alternative resources in the event of unforeseen changes to workplan or staff availability. 	M	H	Good
<p>Insufficient project scoping may lead to an underestimate of effort and complexity of project tasks, impacting project completion and/or budget.</p>	<ul style="list-style-type: none"> • Ensure project requirements are sufficiently analysed and assessed in terms of effort, complexity, and cost. 	L	H	Good

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 DEEWR 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 the associated in the budget

- TUEF does not anticipate purchasing or creating any Asset over the value of \$5000 Inclusive of GST as defined in the Funding Agreement, Clause 33 – *Interpretation*, during this project period.

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

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

Subcontractor	Role/Responsibilities

6 Budget

Provide a comprehensive budget including:

- *Itemised expenditure for 1 July – 31 December 2013;*
- *A general outline of expenditure with regard to the remaining years of the Program;*
- *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)*

Refer APPENDIX B – PET Fund Budget 1 July – 31 December 2013

Refer APPENDIX C - General Outline of Expenditure with regard to the PET Fund program 2012-22

7 Evaluation of Performance against Objectives

Describe any proposed changes to mechanisms specified in the Milestones and Deliverables Plan 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.

This Outline Plan includes the first Education Activities to be delivered by TUEF under the PET Fund.

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 2.8 of this Outline Plan, ie.

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

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

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

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

With regard to Curriculum Review and Development activities, TUEF does not propose any change to the mechanism specified in the Milestones and Deliverables Plan by which performance will be evaluated against project objectives, i.e. by completion of planned activities that are consistent with the objectives of the Agreement by the agreed Milestone dates.

8 Submitting your Outline Plan

Please email a signed copy of the completed PET Fund Outline Plan by close of business on Wednesday 14 August 2013 to: Damien Booth – Program Manager, at the:

PET Fund Inbox - PETFund@deewr.gov.au

APPENDIX A - ACTIVITIES COURSE SCHEDULE AND COURSE DESCRIPTIONS 2013

COURSE TITLE	TARGET GROUP	No. of Instances per State												TOTAL 2013*
		NSW 2013	VIC 2013	QLD 2013	WA 2013	SA 2013	TAS 2013	ACT 2013	NT 2013	TOTAL 2013*				
*Union Governance Train the Trainer (Scheduled Training)	Union Educators	5	3	2	2	1	1	1	1	1	1	1	1	16
^Union Governance Train the Trainer (Scheduled Training)	Union Educators	3	2	2	2	1	0	0	0	0	0	0	0	10
#Union Governance (Non-Scheduled Training)	Officials	1	4	0	1	1	1	1	0	0	0	0	0	8
TOTAL COURSES		9	9	4	5	3	2	1	2	1	1	1	1	34

* This data represents Union Governance Train the Trainer Multi-Union (Scheduled Training) currently scheduled between 1 July 2013 - 20 September 2013. These are the confirmed course dates listed at sheet 2 of this Appendix A - July-Dec 2013 Schedule by Date.

^ This data represents Union Governance Train the Trainer Multi-Union (Scheduled Training) anticipated to be scheduled between 20 September 2013 - 31 December 2013 and anticipated geographic coverage. Course dates cannot be provided at this time.

This data represents Union Governance Single Union (Non-Scheduled Training) anticipated to be scheduled between 1 September 2013 - 31 December 2013, and anticipated geographical coverage. This training need is anticipated from unions without the capacity to undertake and deliver in-house training with a certified trainer who has attended a Train the Trainer course. Confirmed course dates cannot be provided at this time.

As indicated in Section 4.2 - Risk Management of the Outline Plan, while Union Governance training is a statutory requirement, at the time of writing some uncertainty has arisen regarding the statutory period for attendance and completion of course due to recent amendment of the relevant legislation. This may affect achievement of course delivery and participation targets. The ACTU is consulting with the Fair Work Commission to obtain definitive advice regarding the statutory period for attendance and completion of Union Governance training to enable action to be taken to mitigate this risk.

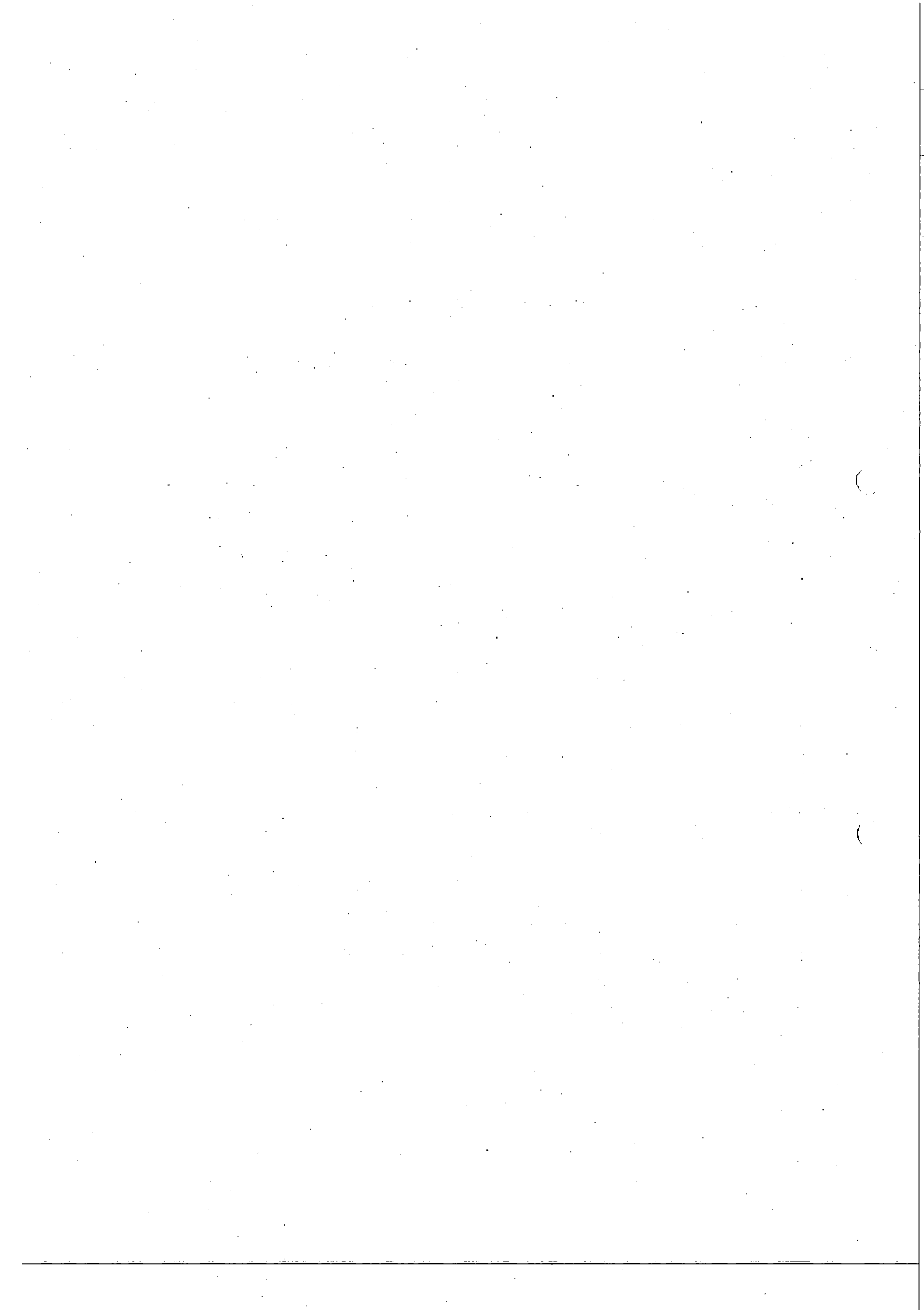
APPENDIX A - ACTIVITIES COURSE SCHEDULE AND COURSE DESCRIPTIONS JULY - DECEMBER 2013

DESCRIPTION	STATE	START DATE	END DATE
Union Governance Train the Trainer	VIC	02/07/2013	02/07/2013
Union Governance Train the Trainer	QLD	09/07/2013	09/07/2013
Union Governance Train the Trainer	NSW	22/07/2013	22/07/2013
Union Governance Train the Trainer	NSW	06/08/2013	06/08/2013
Union Governance Train the Trainer	WA	08/08/2013	08/08/2013
Union Governance Train the Trainer	ACT	12/08/2013	12/08/2013
Union Governance Train the Trainer	VIC	13/08/2013	13/08/2013
Union Governance Train the Trainer	TAS	14/08/2013	14/08/2013
Union Governance Train the Trainer	WA	14/08/2013	14/08/2013
Union Governance Train the Trainer	SA	15/08/2013	15/08/2013
Union Governance Train the Trainer	NT	22/08/2013	22/08/2013
Union Governance Train the Trainer	NSW	26/08/2013	26/08/2013
Union Governance Train the Trainer	NSW	29/08/2013	29/08/2013
Union Governance Train the Trainer	QLD	11/09/2013	11/09/2013
Union Governance Train the Trainer	NSW	16/09/2013	16/09/2013
Union Governance Train the Trainer	VIC	20/09/2013	20/09/2013

This data represents Union Governance Train the Trainer Multi-Union (Scheduled Training) currently scheduled between 1 July 2013 - 20 September 2013 (at 14/08/2013).

APPENDIX A - ACTIVITIES COURSE SCHEDULE AND COURSE DESCRIPTIONS 2013

COURSE	TARGET GROUP	COURSE DESCRIPTION / JUSTIFICATION
<p>Union Governance Train the Trainer</p>	<p>Union Educators</p>	<p>Changes to the Fair Work (Registered Organisations) Act 2012 require all union officers with financial decision-making responsibilities (including elected officials, finance staff and members of management committee) to undertake Fair Work Commission-approved training in the area of Financial Governance by 29 December 2013.</p> <p>The course covers four main components: the legal context of the financial governance changes; conflict of interest and disclosure of financial interests; financial management issues, and; reading and understanding financial reports. The course also provides guidance and supporting materials to enable participants to deliver the course content to their own union officers.</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>
<p>Union Governance</p>	<p>Officials</p>	<p>Changes to the Fair Work (Registered Organisations) Act 2012 require all union officers with financial decision-making responsibilities (including elected officials, finance staff and members of management committee) to undertake Fair Work Commission-approved training in the area of Financial Governance by 29 December 2013.</p> <p>The course covers four main components: the legal context of the financial governance changes; conflict of interest and disclosure of financial interests; financial management issues, and; reading and understanding financial reports.</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.</p>



All figures are GST exclusive

Item	Draft Budget July - Dec 2013	Notes
Income		
PET Grant Money	\$250,000	\$500,000 previously allocated for accounting purposes
Interest Received	\$175,000	Interest based on 3.5% pa. Any interest on the Grant will be used for grant activities in accordance with Clause 3.7 of the Funding Agreement.
Education Income		
Scheduled Training	\$0	
Non Scheduled Training	\$5,200	Based on anticipated 8 Union Governance (Non-Scheduled Training) courses.
Total Education Income	\$5,200	
TOTAL INCOME	\$430,200	
Expenses		
Administration		
Audit Fees	\$0	Audit performed at end of Financial Year
TU OECC Overhead Fees	\$8,000	Invoiced quarterly. Includes IT costs, Office Equipment leases, Office Supplies and Stationery, Postage, Insurances, Printing, Photocopying and Marketing Materials.
Accounting Fees	\$10,200	
Bank Charges	\$200	
Sundries	\$500	
Telephony Expenses	\$250	Teleconference calls
Total Administration	\$19,150	
Staffing Costs		
Salaries & On-costs	\$126,000	Includes salaries and on-costs. Includes 1.0 FTE Union Governance Education Coordinator for the period 1 July - 31 December 2013; Union Governance Train the Trainer Educators; staff contribution to Curriculum Development and Review; and staff contribution to PET project management and administration.
Total Staffing Costs	\$126,000	
Travel & Accommodation		
Travel & Accommodation	\$11,850	Includes costs for Air fares, Accommodation, Travel Expenses and Travel Allowances. Calculated on the basis of travel required to undertake interstate course delivery.
Total Travel & Accommodation	\$11,850	
Total Expenses	\$157,000	
Net Surplus/Deficit	\$273,200	

