

# unionlearn

with the TUC



## Linking the Climbing Frame and the matrix standard for information, advice and guidance services



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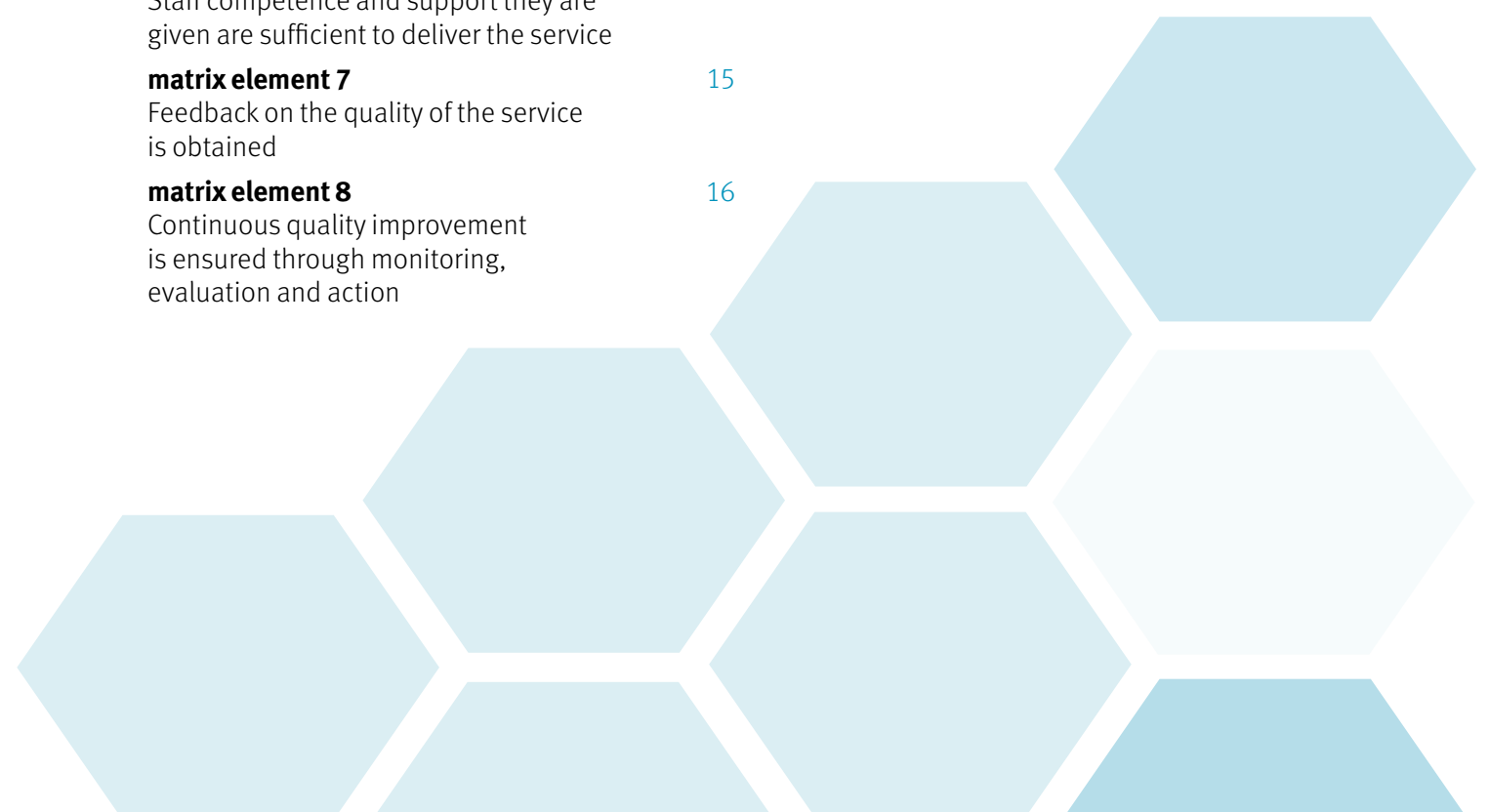
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This guide is for everyone interested in learning activities in the workplace, including union learning reps (ULRs) involved in supporting trade union members in their learning and work decisions and in accessing learning. It does not assume prior experience of using the union learning Climbing Frame or a detailed knowledge of the **matrix** Standard.

It provides an introduction to both and explores how they can complement each other and contribute to the development of high quality support to learners.



## » Introduction

Supporting union learning reps (ULRs) by providing them with the skills, knowledge and information to help their members is a key priority for unionlearn. As a part of the Supporting Learners strategy, unionlearn has developed the Climbing Frame, a straightforward electronic tool for ULRs to help them in their work of promoting lifelong learning in the workplace and assisting members to access learning opportunities.

The **matrix** Standard is a unique quality framework supporting the effective delivery of information, advice and/or guidance on learning and work wherever it takes place. In recent years, many workplace and union learning centres, union branches and unionlearn teams where ULRs work have implemented and been Accredited against the **matrix** Standard. Many describe how it has helped them raise their game, achieve greater consistency and develop and improve their support to learners further.

Good quality information, advice and support to union learners is fundamental to ensuring that they can take advantage of the right courses for them. Giving the right support during their learning journey is also a crucial factor in helping learners to progress in their chosen course of action and to achieve and succeed. The support provided through unionlearn projects has the needs of learners at its heart and so does the **matrix** Standard. Both share the same commitment to high quality, responsive and ever improving support for learners. It is therefore natural to expect that there will be links between the union learning Climbing Frame and the **matrix** Standard. This guide brings the two together, shows how they complement each other and bring benefits in delivering high quality support to learners.

# » Introducing the union learning Climbing Frame

The union learning Climbing Frame is a user-friendly electronic tool that has been designed for union learning reps (ULRs) to help them in their role of supporting learners. It provides both a one-stop shop for information and advice as well as a tool for planning learning pathways and recording learner needs.

ULRs work in many different ways and settings. Some ULRs work alone, sometimes covering a number of workplaces that may be spread over a wide area. Others may be part of a team of ULRs, possibly linked to a learning centre. The Climbing Frame can help ULRs make the best use of the time available to support learners. It can make their life easier in two main ways:

## 1) Through the *Learning Themes* section

In this section ULRs can find information and advice on a wide range of directly relevant topics, with links to useful websites and helpful documents. Information is tiered, so it is easy to get general information quickly and then, as necessary, go to the next level for more detail. Each Learning Theme also includes a Library which contains all the PDF documents and website links which feature in that theme. There is also a useful section in each theme where ULRs can enter their own notes and contact details for future reference.

Using the Climbing Frame it is possible to work with the learner to answer their queries then and there, rather than having to come back to them later. ULRs can also have the confidence that the information included in the Learning Themes is regularly reviewed and the content updated. Information is also provided on key aspects of the ULR role, including help to develop their own skills and knowledge.

Some unions have chosen to customise the Climbing Frame to include bespoke information to reflect their members' learning interests in particular sectors or industries, or learning opportunities with particular employers. For example, USDAW has created a version for workers in retail and distribution, PCS has included information specifically for members

in the Department for Work and Pensions and the union Prospect has developed a version for the Government Valuation Office Agency. In the future, unionlearn will be looking to work with more unions, and also closely with sector skills councils to customise the Climbing Frame for a range of sectors.

## 2) Through the *Learner Management* section

In this area of the Climbing Frame it is possible to develop learning pathways with individual learners. Actions can be created on the Climbing Frame honeycomb grid, which are put into a simple Action Plan that can help them plan their next steps. These actions can be regularly reviewed and updated, dates can be included as reminders to help track progress and there is also space for the ULR to include additional notes.

The Climbing Frame can also be used as a record-keeping tool. ULRs are able to store information about the learners they are working with and build a more complete picture of their learner profiles. A simple report can be generated to show an overview of their learner's statistics.

For more information on the Climbing Frame please visit: **[www.unionlearn.org.uk/climbingframe](http://www.unionlearn.org.uk/climbingframe)**. Here you can download or request a paper copy of the Climbing Frame information leaflet and the Climbing Frame case study booklet.

For further information or to gain access to the union learning Climbing Frame please email: **[climbingframe@tuc.org.uk](mailto:climbingframe@tuc.org.uk)**

# » Introducing the matrix Standard

## What is the matrix Standard?

The **matrix** Standard is the national quality standard for information, advice and/or guidance on learning and work. It provides a straightforward and practical framework of good practice against which to review your support to learners. It also helps in developing and improving a consistent high quality and constantly improving service focused on the learner. It has been specifically designed to be flexible and user friendly and is capable of being applied in any setting where information, advice and support is provided.

## How does it work?

The Standard is made up of eight elements – four covering how people engage with and receive information, advice and support and four covering how this support is planned, organised, resourced, and improved. These are further split into specific criteria and any successful organisation needs to be able to show that they are meeting all the requirements and have the capability to continue to do so in the longer term.

ULRs can use the Standard as a tool to review and improve their support but many unions also apply for external recognition for the quality of their support by seeking formal Accreditation. It is worth a moment to reflect on the Assessment process. It takes place on-site and focuses on how things work in practice and the realities of the services provided – it is not a paper exercise. Much of the evidence will come from discussions with learners, ULRs, coordinators and others involved but there may be opportunities to see the support in action or look around as well. There may well be written materials which can also be used to support the evidence from other sources. It is not a test and the Assessor is there to help you present the evidence to show you meet the Standard – to ‘catch you in’ and not ‘catch you out’.

Implementing the **matrix** Standard doesn’t mean that you are starting from scratch. When organisations committed to high quality services first look at the

framework, there will be many areas where the evidence is immediately apparent (“yes, we do that and we can prove it”!) but there may be others which might need more reflection or research. Most organisations find that it is an opportunity to step back from the demands of delivery and consider if there are things which could be usefully improved.

Visit the **matrix** Standard website at [www.matrixStandard.com](http://www.matrixStandard.com) where a range of publications are available for download or order. You can also look at a number of case studies of centres, ULR teams and unions who have already met the Standard by going to the ‘About the **matrix** Standard’ section in the website.

For more information on the **matrix** Standard look in the Supporting Learners section of the unionlearn website [www.unionlearn.org.uk/advice/index.cfm](http://www.unionlearn.org.uk/advice/index.cfm) where you can download a guide written for unions on working with the **matrix** Standard.

# » How to use this guide


## Something for everyone

You may be looking at the **matrix** Standard for the first time, have already committed to working towards it or already have Accreditation and be thinking about Accreditation Review.

You could be exploring using the Climbing Frame or be already making use of it. This guide can save you some work by making the links between the two and clarifying the benefits of both in developing and improving the support you offer to learners.

Working with the **matrix** Standard framework you will find evidence from a lot of different sources to demonstrate that you are providing high-quality support to your learners, one aspect of which might be using the Climbing Frame. Of course, the Climbing Frame cannot link to all the requirements of the **matrix** Standard, particularly elements five to eight of the Standard, which cover how the whole of the information, advice and support to learners is managed.

**This guide shows how using the Climbing Frame as a tool to support learners can contribute some of the evidence and support an application for Assessment. The eight elements of the Standard are outlined briefly in the following pages, together with a description of how the Climbing Frame can help attain them. The requirements have been clustered together and interpreted for the information, advice and support that ULRs provide, but not all criteria are covered.**

*However, the fit with requirements of the Standard and the suggested evidence the Climbing Frame might provide are indicated by the symbol *

## Things to consider

To get the best match, you will need to look at:

- How is the Climbing Frame currently being used?
- Is it being used to its full potential or is this restricted by how and where you work with learners or other local factors?
- Are all ULRs using the Climbing Frame in the same way?

In addition to these general issues, there are also some suggestions that you might like to consider under each element, to ensure that you are making full use of the Climbing Frame as a tool and in developing support to learners.

*Note: Don't worry too much about the terminology used in the Standard. This guide tries to put things in terms of the information, advice and support that ULRs provide every day to members in the many and various settings in which they work.*

# » matrix element 1

## People are made aware of the service and how to engage with it


### *Promotion ensures the accessibility of information about the service*

- 1a** The purpose, expected users and range of services are defined
- 1b** Promotional activities provide essential information about the nature of the service, and about the support available to access and use the service
- 1c** Information about the service is accessible to potential users
- 1d** Promotional activities take account of equality of opportunity


This means that from the beginning, clear definitions of the service you provide have been established and these have guided the design and development of every aspect of the support including the promotion of the help on offer. These promotional methods are appropriate for, and are effective in, reaching potential learners who have a good idea about what is on offer and how to take advantage of it.

#### You will need to demonstrate that:


- your starting point reflects the purpose of the support to learners, the needs of the expected users and the range of services on offer including any restrictions and that these are widely shared and used


*The design of the Climbing Frame reflects the purpose behind unionlearn and has taken account of the range of services likely to be available from ULRs and the ways these might be provided. It also allows for the information available to be customised to reflect the sector or employer covered and to store local information of direct relevance to people on the ground.* 

- you promote the support using methods which attract potential learners and make sure that they have all the essential information they need to take up what is on offer

*Demonstrating the Climbing Frame to groups or at events can be an innovative way to attract new people to the idea of getting involved. There may also be some potential learners who find the idea of using an electronic tool particularly appealing. For examples of how ULRs have used the Climbing Frame to promote the support on offer, look at the case studies in the booklet *Using the Union Learning Climbing Frame*.* 

- the promotional methods and materials are accessible to potential learners and do not exclude any who may have physical, personal or communication barriers

*The Climbing Frame allows you to collect and collate key information about who is making use of the service. This information could be used to review promotional methods to ensure they are reaching all the target groups and then adapt your publicity accordingly to get the message across more widely.* 

*The Climbing Frame provides easy access to advice about making materials accessible, encouraging people to participate and working with groups with Skills for Life needs and other barriers.* 

#### But you will need to think about:

- whether there is a need to amend current promotional materials or the descriptions given of the support on offer to make reference to the Climbing Frame so that all potential learners are aware of it
- how you reassure people less confident with using computers and encourage them to take up what is on offer; for example, promoting the Climbing Frame might be used as a starting point for discussions on developing their ITC skills
- if you have or need to get feedback about how people first heard about the Climbing Frame and how they felt; this could help to develop publicity which emphasises the benefits of the Climbing Frame and ensures that all potential learners are aware of what is on offer.

#### Hints and tips

- If you would like to use the Climbing Frame logo please email [climbingframe@tuc.org.uk](mailto:climbingframe@tuc.org.uk) to request it.
- It may be a good idea for a ULR to take a beginners IT course if they are not confident using a computer.
- If possible ULRs should go on the TUC Education two-day Climbing Frame course. On this course you will be given clear instructions as to how to use the Climbing Frame and will be given lots of information to help ensure the ULR is at ease using the tool and can make the most out of using it.
- You can order copies of the Climbing Frame leaflet and case study booklet from the Climbing Frame section of the unionlearn website: [www.unionlearn.org.uk/climbingframe](http://www.unionlearn.org.uk/climbingframe)



## » matrix element 2

### People's use of the service is defined and understood

#### *Defining and understanding the service available and clarifying key policies and practices*

**2a** People are offered a full description of what they can expect from the service

**2b** People are made aware of the confidentiality and diversity policies as appropriate

**2c** People are given the opportunity to explore the suitability of the services to meet their needs


**2d** People's requirements in relation to the stated service are established

**2e** People are signposted and/or referred to other relevant services where appropriate

This means that potential learners are introduced to, and get realistic expectations of, what is on offer and whether it meets their needs and if necessary, are told about other sources of information or support.


#### You will need to demonstrate that:

- potential learners are able to find out at an early stage what they need to know about the support available, including any key things they should be aware of

*The Climbing Frame provides advice on the structure of the first meeting with a potential learner helping to make sure that all the key information is covered in a consistent and logical way.* 


*As part of creating a learner record, people will be made aware of confidentiality and the use of the personal information that they provide.* 

- the needs of potential learners are consistently diagnosed and they are able to explore whether the support on offer could meet their needs

*The format of the Learner Details record using the Climbing Frame encourages discussion on people's needs and aspirations and the suitability of the help on offer. ULRs are offered advice on its completion and how to build up a picture of the needs of potential learners.* 

- you are signposting or referring people to other services or sources of information and support where these better meet their needs.

*The Learning Themes section has details on a range of other sources of help which ULRs can access for further*

*information or to which learners could be signposted, including links to other relevant external websites. ULRs can also add useful local sources and contacts for future reference in the ULR Notes section.* 

#### But you will need to think about:

- how potential learners are made aware at an early stage that the Climbing Frame is used as part of the support whatever the route of first contact
- the ways you introduce and explore the benefits of the Climbing Frame with potential learners who may not be confident in using a computer; for example, by sharing an example of a completed record (perhaps your own) or introducing the idea of developing their own IT skills
- how consistently the Learner Details record is used in the initial meetings where the services are discussed to ensure that key details are explored and all key learner information is captured
- the extent the ULR Notes section is being used to record useful contacts and services for signposting and referral
- the ways local information and knowledge is shared with other ULRs who might cover similar groups of learners or geographical locations; for example, through networking, discussion forums and other opportunities to share information
- how the views of learners about the first meeting and any first impressions about the Climbing Frame have been captured and have influenced what happens
- how you review signposting and referral decisions to ensure a consistent response to specific learner needs.

#### Hints and tips

- If you have a number of ULRs using the Climbing Frame and have some information which you think would be useful to them all you can email or provide them with this information and they can store it in their ULR Notes sections in the Climbing Frame.
- You may want to design some questionnaires to help you evaluate the use of the Climbing Frame.



## » matrix element 3

### People are provided with access to information and support in using it *Providing information in accessible forms and assisting people to use it*

**3a** Information held or accessed by the organisation is sufficient for, and relevant to, the stated service

**3b** Information provided to people is accurate, current and inclusive

**3c** Information is managed and evaluated to ensure it remains relevant to the stated service

**3d** People are supported in accessing, understanding and using information through resources appropriate to their needs

This means that sufficient up-to-date, relevant and accessible information is available to provide the level of support on offer to learners and that learners are helped to make the best use of it.

#### You will need to demonstrate that:

- the range of information held or that can be accessed enables you to meet the information needs of the learners

*The information available through the Climbing Frame has been compiled with the needs of ULRs in mind and provides a one-stop, easily accessible resource on learning and work issues. Hyperlinks give quick access to useful external sites such as unionlearn and the unionlearn learning and careers advice service, including details of local learning opportunities. These are particularly helpful if you are covering a wide geographical area. The Library section enables ULRs to download relevant publications and access relevant websites to support research.* **CF**

*The information can be made even more directly relevant to learners if unions or sector skills councils have customised the information for specific sectors or job roles. ULRs can build up their own library of information by making use of the ULR Notes section.* **CF**

- you can make information available in appropriate formats and media to respond to any barriers learners may have to making use of it

*The design and layout of the Climbing Frame has taken account of possible key personal barriers to accessing information, such as Skills for Life needs or disabilities. ULRs can also get copies of useful guides on making*

*information materials accessible to support their work with learners.* **CF**

- all the sources of information are maintained and developed to ensure the information is accurate, kept up to date and developed in line with demand

*The information is managed centrally and updated and developed at least every six months to ensure it remains current and relevant.* **CF**

*The Climbing Frame provides a reference source for research when ULRs want to update and develop their own knowledge.* **CF**

- learners are given appropriate help and support to enable them to access, understand and make use of the information.

*As part of interviewing the learner, ULRs are able to work alongside them to help them find and interpret the information they need using the Climbing Frame.* **CF**

#### But you'll need to think about:

- the ways you use to ensure learners can get access to all the information they need if you are working at sites without internet access or in workplaces where employees do not have access to a computer – for example, ensuring that they have realistic expectations about how quickly it can be sent out by post
- what approach you use to update and develop the local information that has been entered in the ULR Notes section and update any downloaded information held
- how you make sure everyone is using the current version of the Climbing Frame
- the help and support provided to learners to make use of the Climbing Frame and access the information it contains, particularly if this is a new concept to them or they cannot access a computer
- any feedback that has been obtained from learners about the information they received – this might be a factor in deciding to use the Climbing Frame or, if you are already using it, it could be used to measure and evaluate its impact or identify gaps in information.

## Hints and tips

- The text information found on the Climbing Frame and the PDF documents can be accessed offline.
- A good idea may be to regularly provide information to your ULRs for them to put in their ULR Notes sections. This information can be regularly reviewed and updated as and when required.
- It is important that users of the Climbing Frame regularly click 'Update' to ensure they have the most recent content for their Climbing Frame. They should also click 'Upload' to ensure the information about their learners is uploaded onto the server.
- ULRs are ideally placed to support learners, to get the most out of using the Climbing Frame and to meet learners needs.
- It may be useful to gather feedback from your learners on the Climbing Frame so you are able to evaluate the tools impact.

## » matrix element 4

### People are supported in exploring options and making choices


#### *Providing information, advice and/or guidance to assist people to review choices*

- 4a** People have access to impartial and objective information, advice and/or guidance
- 4b** People are aware of the purpose and limitations of the information, advice and/or guidance available
- 4c** People understand and agree how the support process will be conducted
- 4d** Options and choices are presented to people in a manner that assists their understanding
- 4e** People have opportunities to consider and explore options and are given appropriate support and encouragement during the process
- 4f** People are able to make their own choices


This means that effective, user-focused and high-quality support is provided to learners that meets their needs and helps them identify and reflect on the options available to them and make well-informed and realistic decisions about their next steps.


#### **You will need to be able to demonstrate that:**


- learners are clear about what is on offer and how it will be provided and are willing to proceed on that basis. They feel confident that their needs are central to the discussions and understand any limitations to the support available

*The introductory experience and agreeing how the support will be provided is an integral part of the interview format. *

- you provide support that enables learners to identify and explore the options which might be appropriate to them, helps them to understand the implications of the different options and encourages them to come to informed conclusions


*Following the framework encourages a consistent interview model which prompts and develops the discussions with the learner. There is advice on interviewing techniques following good practice to support ULRs to provide an effective experience for the learner. *


*Information on a range of options is quickly available using the links in the Learning Themes section during the discussions. *

*Building a personal Climbing Frame with the learner provides a visual and easy to understand individual pathway of choices to reach longer-term goals. *

*The Learner Management section allows ULRs to create a record of the discussions and an action plan to act both as a reminder of agreed actions and as a basis for ongoing support. *


- learners have the knowledge and time to arrive at their own decisions and feel in control of their choices.

*The learner record enables you to track progress and the outcomes of referrals, plan future contacts and provide ongoing support to achievement as learners follow their chosen pathway. *

*A bank of case histories is created to use when you are reviewing effectiveness and analysing the impact of the support learners have received. *

#### **But you'll need to think about:**

- how you make sure learners have realistic expectations of what is on offer (including any limitations) and know that it is unbiased
- the way the use of the Climbing Frame is explored as part of agreeing the best way to proceed – for example, showing a completed Climbing Frame to give a visual explanation of what to expect
- the added value of using the Climbing Frame during the interview both as an attractive way to present options and as a memory jogger for the learner
- how using the Climbing Frame can make the best use of the time available with the learner and ensure that their needs are at the heart of the discussion – for example, asking the learner to complete a proforma covering key information prior to the interview, which can be used as a checklist or entered later to save valuable face-to-face time

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- what happens in circumstances where it is not possible to print out a copy of the action plan or information at the time of the interview – for example, arrangements and timescales for getting it to the learner
  - whether you have feedback about the experiences of learners where the Climbing Frame has been used to help to evaluate its impact or if this should be introduced.

#### Hints and tips

- All the pages of the Climbing Frame are printable. If you do not have access to a printer you are able to copy and paste the text into a Word document or an email.
- It may be a good idea to gather feedback from ULRs and learners on the Climbing Frame.

## » matrix element 5

### Service delivery is planned and maintained


#### *Defining measurable aims and objectives and setting up systems to deliver the service*


- 5a** The service has clearly defined measurable aims and objectives
- 5b** The service is given clear leadership and direction
- 5c** The views of those delivering the service inform service planning and delivery
- 5d** The internal management of the service ensures resources are appropriate and effectively used
- 5e** The service identified and responds to relevant legislation, codes of practice and ethics
- 5f** There are defined policies and practices for service delivery, incorporating the principles established by the National IAG Board
- 5g** The service has established appropriate partnerships and networks

This means that the support to learners has clearly defined aims and objectives that guide all aspects of how the support is planned, resourced and organised and how progress towards these goals is measured.


#### You will need to be able to demonstrate that:


- there is a clear understanding, shared by all, of what the support to learners is aiming to achieve and you have identified key indicators which allow you to measure how well you are doing

*The Climbing Frame was developed as part of the unionlearn strategy and model for Supporting Learners and shares the vision of how effective information and support to learners can encourage participation in learning and the right outcomes for the learner. *

*The data recorded in the Learner Management section about learners, their choices and progress in their learning can be used as indicators to inform any reviews of the effectiveness. (see element 8) *


- you have ways of planning and organising how the support is provided involving everyone concerned which ensures that it runs effectively and that the best use is being made of the available resources (including ULR time)


*Unions, sector skills councils and union reps were all involved in the design and development of the Climbing Frame and its use with learners has been extensively piloted by ULRs whose views informed the current version. Your decision to introduce the Climbing Frame will undoubtedly involve those who will be using it. *

*Using the Climbing Frame can help ULRs to make the most productive use of the time available to support learners both by giving rapid access to information and links to other sources through the Learning Themes section and making it easier to create and keep records on learners all in one place. *

- there are agreed procedures to make sure things run as planned and assure the consistency of the support which not only respond to any appropriate legislation but also reflect widely recognised essential principles behind quality information and support

*There are clear processes for using the Climbing Frame to encourage consistency and advice on how to get the best out of its features including completing a learner record and action plan. *

*Through the Climbing Frame, it is easy to access good practice guides covering many aspects of support to union learners and sources of further help and advice to help develop tailored policies and practices. *

*Through the Library section or by using the hyperlinks, there is access to information and advice on key legislation relevant to workplace learning or the needs of learners, information on national initiatives and government policy which might impact on the work of ULRs. *

- you have built up a range of good relationships with networks and partners who contribute directly or indirectly to the support to learners or represent shared interests and goals.

*Information built up through using the Climbing Frame on the profile of learners, their needs, aspirations and learning choices can contribute to useful discussions with partners and key stakeholders, some of whom were consulted about its design. **CF***

#### **But you'll need to think about:**

- the indicators you have identified which enable you to evaluate the specific contribution of the Climbing Frame to the effective support to learners
- how you have been able to negotiate access to the equipment you need to make full use of the Climbing Frame – for example, how you have been able to resolve situations where ULRs or learners are not able to access computers or have internet access in the workplace
- the guidance which is provided on the content and completion of the free type areas in the learner record to support consistency, accuracy and future review
- once you are using the Climbing Frame, if all your procedures still reflect how the support is provided or if they need revising
- if you are making the most of the Climbing Frame as a recording tool and are confident that it is providing a complete picture of learner needs – used systematically it makes tracking of learner progress easier and an analysis of the data provides a source of evidence to use in evaluation or negotiations with employers.

#### **Hints and tips**

- The Climbing Frame two-day course will provide information on how ULRs can complete the free type areas in the Climbing Frame.
- For up-to-date information on the Climbing Frame visit: [www.unionlearn.org.uk/climbingframe](http://www.unionlearn.org.uk/climbingframe)



## » matrix element 6

### Staff competence and support they are given are sufficient to deliver the service


#### *Maintaining and developing the competence of those delivering the service*

- 6a** Staff are given an induction into the service and their role within it
- 6b** The competence of staff is maintained and developed to meet service demands
- 6c** Staff recognise the boundaries of their role in relation to the service and seek appropriate support
- 6d** Training and support in the use of equipment is provided
- 6e** Supervision and support are provided to staff
- 6f** Staff can describe how they are involved in reviewing their performance and identifying their development needs linked to objectives


This means that the support to learners is provided by competent, skilled and knowledgeable union reps who are properly supported and developed in their role.

#### You will need to be able to demonstrate that:


- everyone receives an effective induction when they take on the role of ULR or those undertaking a project management role

*The Climbing Frame is now included in all initial training for ULRs with further training offered as an optional module. There is also a range of materials and advice which can be accessed through the Climbing Frame to support new ULRs in particular. *


- on going training and development is available including in the use of any equipment – this might include not only formal courses through unionlearn or other sources but also in-house development offered through the union or ULR network and the more informal opportunities to learn and grow in the job

*The Climbing Frame offers guidance to ULRs on their role and advice on good practice in interviewing and advising learners to allow ULRs to develop their skills through supported practice. *

- you have formal and informal arrangements in place to support ULRs in their role with clarity about where to seek help as appropriate when the support needed is outside the scope of the information and help offered or their expertise


*Links to other relevant websites, the Library section of useful publications and details of specialist information and advice can all help the development of knowledge and skills to support learners. It also facilitates access to the wider network of ULRs and other interested bodies. *

- development needs are identified and reviewed to achieve the goals set – this might include self-reflection or group reviews and increasingly, project managers and unions are arranging for 1-2-1 discussions with ULRs, whether face-to-face or by telephone conferencing.

*As a source of advice on essential skills and knowledge, ULRs can turn to the Climbing Frame to help them review their own practice and as a source for personal research to develop information and knowledge on a broad range of issues outside their normal experience. *

#### But you'll need to think about:

- if everyone has been able to take advantage of the training on the Climbing Frame yet so they can make best use of the tool
- if ULRs have used the Climbing Frame as an opportunity to lead by example and develop their own IT skills further
- how ULRs have developed their interview style to allow for using the framework. For example, by practicing on themselves or piloting its use with colleagues
- if there have been sufficient opportunities to take time to explore all the features of the Climbing Frame to make the most of its benefits as a source of information and support
- how ULRs are updated when a new version of the Climbing Frame is issued.



### Hints and tips

- Dates for the Climbing Frame courses are posted on the Climbing Frame section of the unionlearn website: [www.unionlearn.org.uk/cfdates](http://www.unionlearn.org.uk/cfdates)
- Information about possible ICT courses that a ULR or learner may like to take can be found in the ICT Learning Theme on the Climbing Frame.
- The Climbing Frame course gives ULRs a chance to try out interview techniques with the Climbing Frame and look at all the features that the Climbing Frame offers.
- When a large update has taken place on the Climbing Frame content, registered Climbing Frame users will be sent an email. When they click 'Update' the next time they go online they will automatically receive the updated Learning Themes content.

## » matrix element 7

### Feedback on the quality of the service is obtained


*Obtaining feedback from users of the service, those involved in delivery of the service and other agencies*


- 7a** People are advised of who to contact with a compliment, complaint or suggestion and how these will be handled
- 7b** People are advised of how their views on the service can be fed back
- 7c** Organisations proactively seek the views of service users, staff and other agencies to regularly evaluate the quality of the service
- 7d** Formal and informal comments on the service are evaluated and acted upon as appropriate

This means that feedback has been actively sought from a range of key stakeholders and that the results have been analysed and acted upon to inform improvements.


#### You will need to demonstrate that:

- you promote the feedback methods to learners who understand how to give their views whether positive or negative about the information, advice and support they have received, including on the Climbing Frame
- key stakeholders (learners, ULRs and other interested parties) are encouraged to give their views (both formally and informally) on the quality of the support provided and how it meets the needs of learners

*Working alongside the learner using the Climbing Frame gives more opportunity to systematically ask for informal feedback as part of the discussions. *

*You should already be getting feedback from learners on the support provided but the Climbing Frame also gives advice and suggestions on how to undertake a Learning Needs survey to gain an insight from a wider section of the membership about their views on learning. *

- feedback is critically analysed and evaluated with resultant actions to improve and develop the support provided – ‘listening to and learning from key stakeholders’.

*The Climbing Frame has been developed in consultation with a broad range of interested parties. *

#### But you’ll need to think about:

- the feedback obtained from learners specifically about the Climbing Frame – for example:
  - people’s awareness at the outset of the Climbing Frame as a tool used for supporting learners
  - learners’ opinions on the use of Climbing Frame in the support they have received
  - their views on the information provided through the Climbing Frame and whether it met their needs
- if you are at a stage where you have feedback results after introducing the Climbing Frame that could be used to gauge its impact on the support provided – would it be useful to plan for this to help evaluate the effectiveness of its use in your context and with your groups of learners?
- the ways ULRs are able to contribute their views about the Climbing Frame and share ideas about how to make the best use of it or how it could be improved
- how you seek the views of other agencies (e.g. local providers) on the impact of using the Climbing Frame with your learners – for example, to confirm they feel they are receiving more effective referrals from better informed learners.

#### Hints and tips

- It may be useful for you to gather feedback from ULRs and learners about their experiences of using the Climbing Frame.
- Unionlearn welcomes feedback on the Climbing Frame, email: [climbingframe@tuc.org.uk](mailto:climbingframe@tuc.org.uk)
- An idea may be to have meetings throughout the year with ULRs to see how they are getting on with the Climbing Frame.

## » matrix element 8

### Continuous quality improvement is ensured through monitoring, evaluation and action


#### *Evaluating the effectiveness of the service and planning improvements*


- 8a** Effectiveness is regularly monitored and evaluated against the aims and objectives of the service
- 8b** Feedback ensures that the effectiveness of the service to individuals is being regularly monitored and evaluated to inform continuous improvement
- 8c** Appropriate action is taken to improve the service to individuals
- 8d** The service is continuously developed and improved

This means that you are committed to reviewing critically how things are going and measuring effectiveness against the aims and objectives of the support to learners. You are able to show that you have ways of responding with the necessary actions, so that over time the support is developing and improving.


#### You will need to demonstrate that:

- you have opportunities to reflect on your achievements and progress towards the service goals using some key indicators of effectiveness in the monitoring and evaluation of the information, advice and support to learners

*Details of learners and their learning can all be recorded in the Learner Management section. With everything in one place, it is easier to track individual progress towards their goals and build up a picture of both key pathways and also to gain an insight into the stumbling blocks along the way. Any and all could be valuable sources of information you could use to measure how effective the help has been and how it could be refined. *

*The data can also be collated to produce a profile of your current learners that could inform a range of decisions about how to improve how the support is provided. For example, you might identify gaps in the groups approaching ULRs for help which could lead to changes in future promotional activities. It could also contribute to discussions with other groups involved in workplace learning such as sector skills councils. *

- you listen to your learners, those involved in providing the support and other agencies that you work with and that this feedback has been used to inform changes and developments

*As well as more general feedback exercises, the results of any Learning Needs Surveys could be useful not only to inform actions to increase participation but also to plan other developments, for example, to plan future courses with providers and in negotiations with employers for improved access to learning. *

- there are plans for future developments and examples of how past, present and future planned improvements have come about.

*The benefits of introducing the Climbing Frame could be used in demonstrating a range of improvements in the support to learners. *

#### But you'll need to think about:

- how you include, or will include, the use of the Climbing Frame in the monitoring and review of the effectiveness of the information, advice and support to learners
- the ways the intelligence extracted from the Learner Management section has been used to inform monitoring, review and evaluation of the support provided
- how use of the Climbing Frame has contributed to, and impacted on, the support to learners and how this has been evaluated – how you know it is achieving its full potential – have there been actions taken to enhance the benefits of its use further and improve the support to learners?
- the plans you have to make further use of the potential of the Climbing Frame in supporting learners as part of wider ongoing improvements.

#### Hints and tips

- ULRs are able to print off a report from their Climbing Frame which shows basic information about learner activity.
- Please email any feedback about the Climbing Frame to [climbingframe@tuc.org.uk](mailto:climbingframe@tuc.org.uk)





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