

# A guide to the learning and development pathway for RCN representatives

April 2011 – March 2012

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## 1. Foreword from Dr Peter Carter OBE

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Welcome to the RCN's learning and development pathway for RCN trade union representatives for 2011 to 2012.

This coherent, consistent and flexible programme is delivered at a local level for both newly accredited and more experienced representatives. The programme aims to meet the changing needs of representatives in the workplace, and is responsive to your learning needs, both now and in the future. It also enables the RCN to recruit, support, develop and retain its representatives more effectively.

Please do not hesitate to get in touch with us if you have any ideas about how we can improve the programme further, via [sue.antrobus@rcn.org.uk](mailto:sue.antrobus@rcn.org.uk) in England, [garrett.martin@rcn.org.uk](mailto:garrett.martin@rcn.org.uk) in Northern Ireland, [ellen.hudson@rcn.org.uk](mailto:ellen.hudson@rcn.org.uk) in Scotland, and [david.wallace@rcn.org.uk](mailto:david.wallace@rcn.org.uk) in Wales.

I hope you enjoy what we have on offer for 2011 to 2012!

With best wishes

A handwritten signature in blue ink, appearing to read 'P. Carter'.

**Dr Peter Carter OBE**

*RCN Chief Executive & General Secretary*

## 2. Role descriptors for RCN representatives



RCN representatives are provided with a set of role descriptors relevant to their role. A set of generic role descriptors applies to all RCN representatives and a specific set of descriptors applies to each of the representative roles. The role descriptors clearly define and outline the work of learning representatives, stewards and safety representatives.

### **Specific role – RCN accredited trade union steward**

**Summary of role:** To support and represent members in the workplace, protecting their workplace employment rights and ensuring members are treated fairly.

### **Specific role – RCN accredited trade union safety representative**

**Summary of role:** To ensure the health, safety and welfare of all staff/members in the workplace by promoting and implementing a safety culture where members can work in a safe and healthy environment.

### **Specific role – RCN accredited trade union learning representative**

**Summary of role:** To support the learning and career development of RCN members in the workplace through enabling members to meet continuing professional development requirements for safe and effective practice.

Full role descriptors can be found in section 12 (page 16).

### 3. About the learning and development pathway for representatives



Led by RCN Council, and building upon the detailed role descriptors for RCN representatives, the pathway has been developed in collaboration with the UK Committees for Stewards, Safety Representatives and Learning Representatives and was designed after listening to RCN representatives and RCN officers.

An RCN representative can expect individual support from their learning and development facilitator\* and a named mentor (see section 10, page 14), based on a self-assessment of their learning and development needs. Focused upon the principles of work-based learning, and combining facilitated learning with structured supported learning, representatives will develop knowledge and skills as RCN representatives. Experienced RCN officers and representatives assist in developing competence on key aspects of the representatives' role.

The pathway is delivered in collaboration with the region/country and the UK Committee for Activists' Learning and Development. The first point of contact for enquiries should be the local RCN office.

The RCN has appointed an external accreditation provider – Open College Network – to work in partnership with us to quality assure our learning and development provision for RCN representatives across the UK. External programme accreditation is seen by the RCN as a process to achieve a quality 'kite mark' from an external accreditation body against agreed standards. This will ensure the RCN's L&D provision for RCN representatives contributes to learning and is fit for purpose in preparing RCN representatives for their roles.

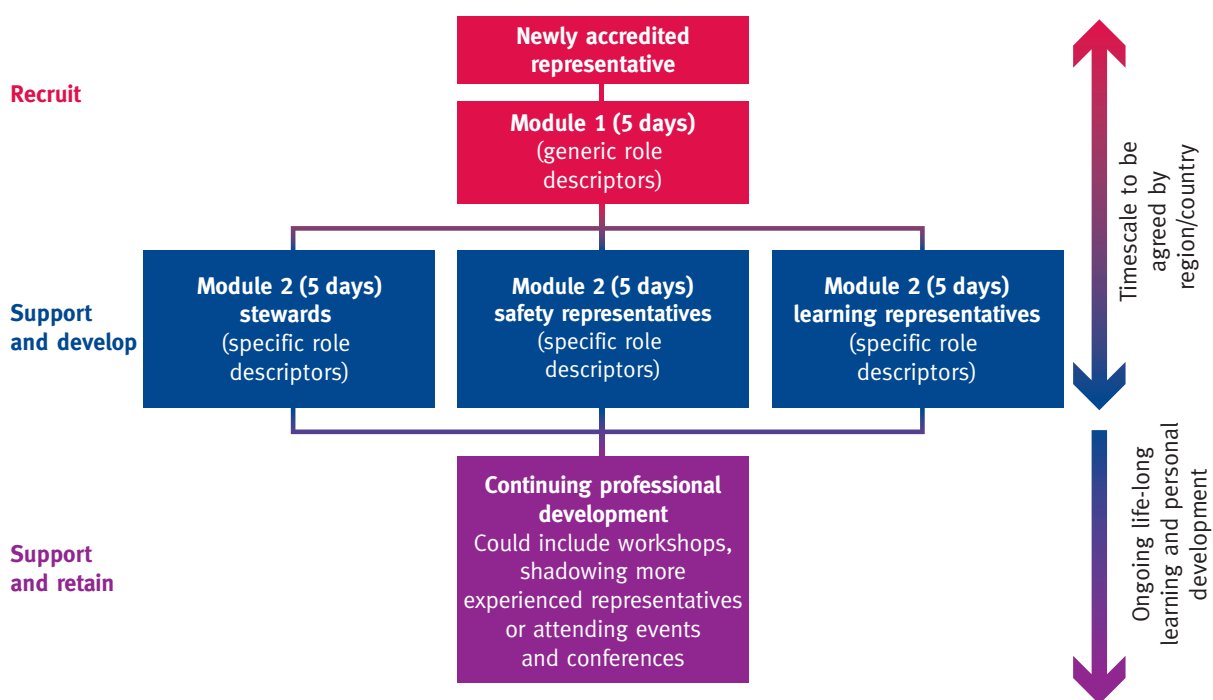


\* Representatives are supported by the learning and development facilitator or staff member who delivers the pathway. However, throughout this guide we shall use the generic term 'learning and development facilitator'.

## 4. Overview of the pathway

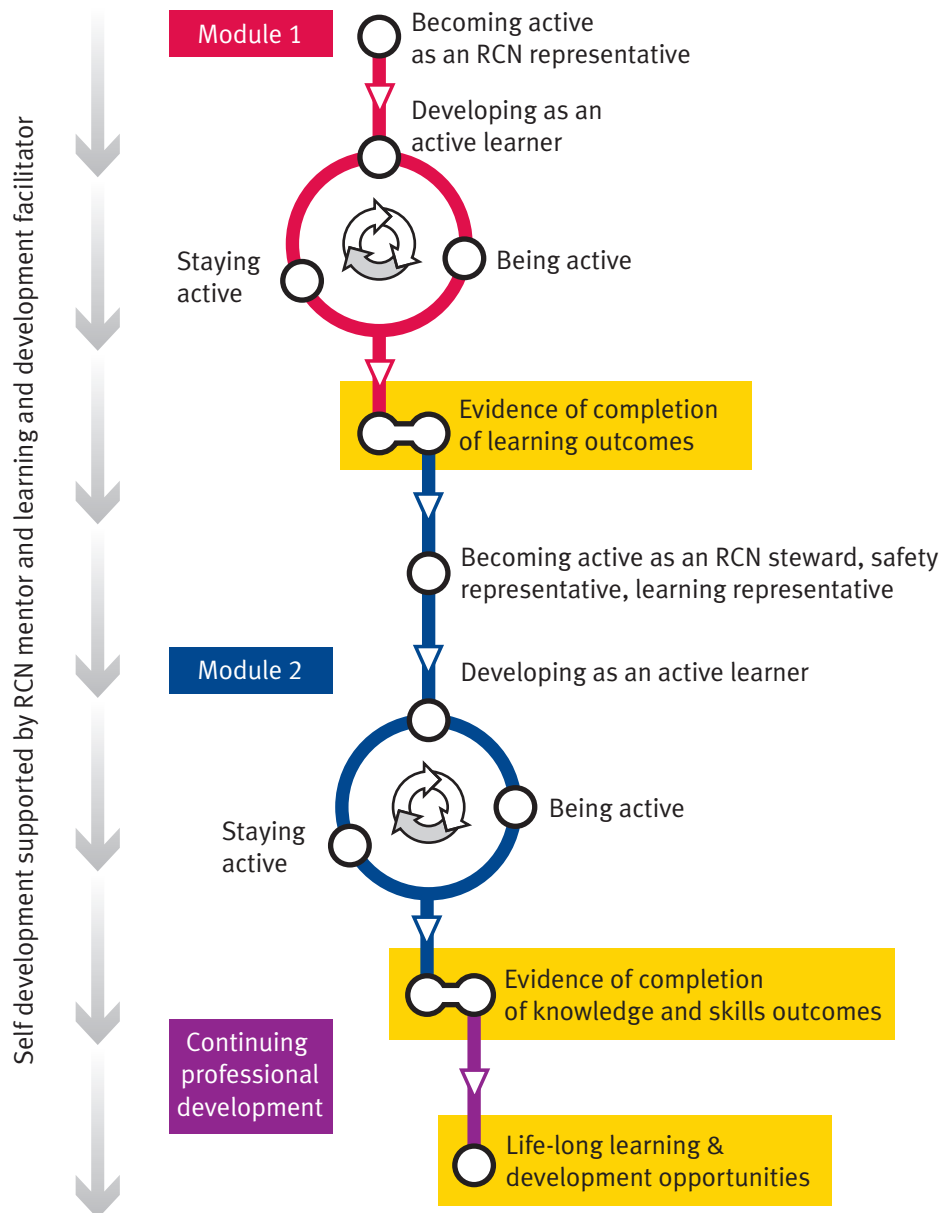
This new pathway aims to make the process of organising the learning as clear and straightforward as possible. The purpose of the learning and development pathway is to prepare RCN representatives for their practice. Mentorship undertaken by RCN officers/assistant officers will be key to supporting representatives to identify their ongoing learning and development needs and develop competence in their practice.

### The learning and development pathway for RCN representatives: a snapshot





## Moving through the pathway

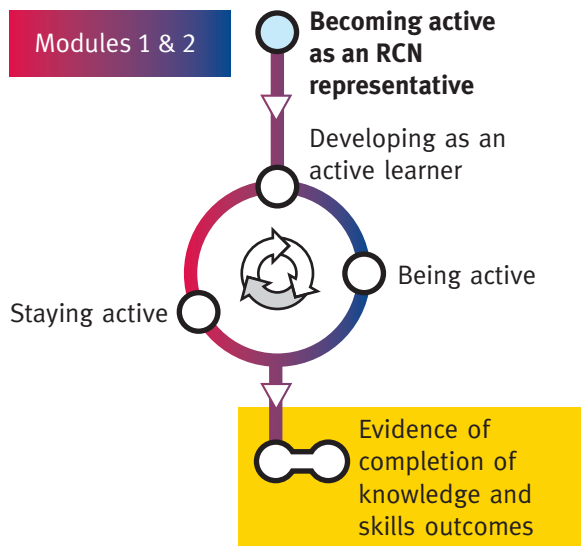


## The key stages of being active

The programme is structured around four themes that represent the journey to becoming an RCN trade union representative:

### 1. Becoming active

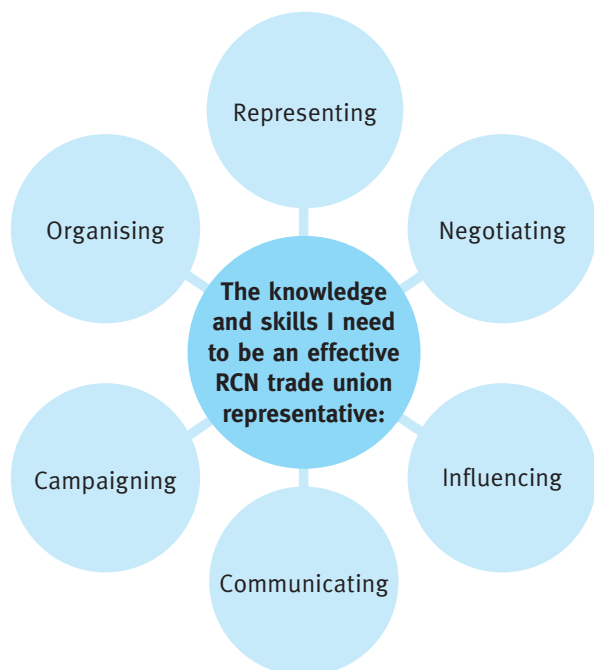
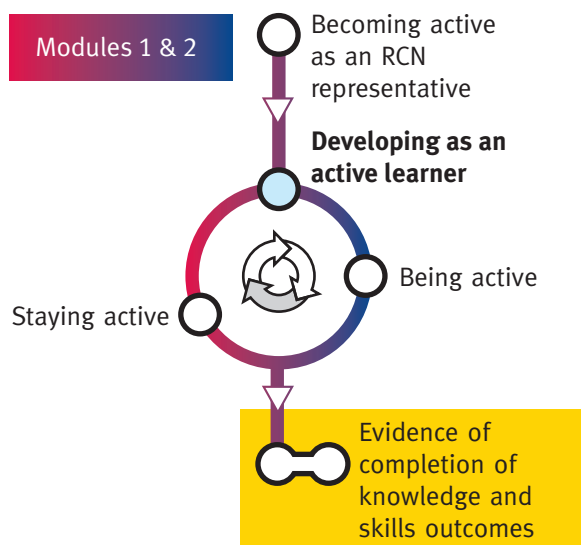
- Self assessment against the generic and specialist parts of the RCN role descriptor
- Personal development planning with mentor support



Becoming active as an RCN representative		
Self development	Supported by	Working with my RCN mentor
Self assessment against generic and specific role descriptors		Meeting with my RCN mentor and agreeing learning contract
Personal development planning		Supported through mentoring relationships to agreed UK standards
Developing confidence and competence as an RCN representative		Agreeing evidence to demonstrate learning/competence
Demonstrating confidence and competence in role		Signing off my portfolio as an RCN representative

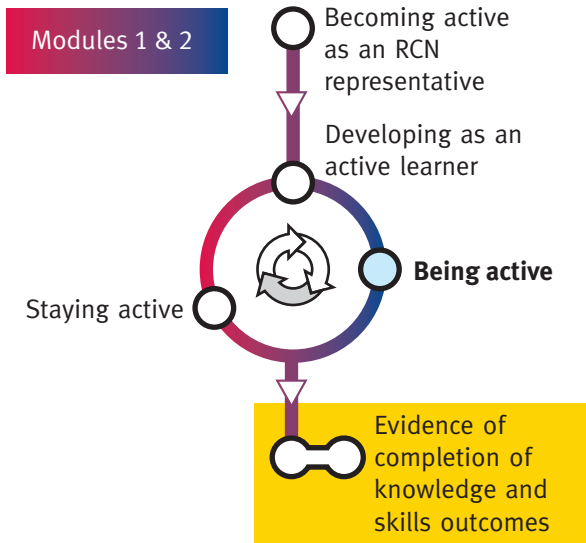
### 2. Developing as an active learner

- Skills development based upon the core knowledge required to be an RCN representative



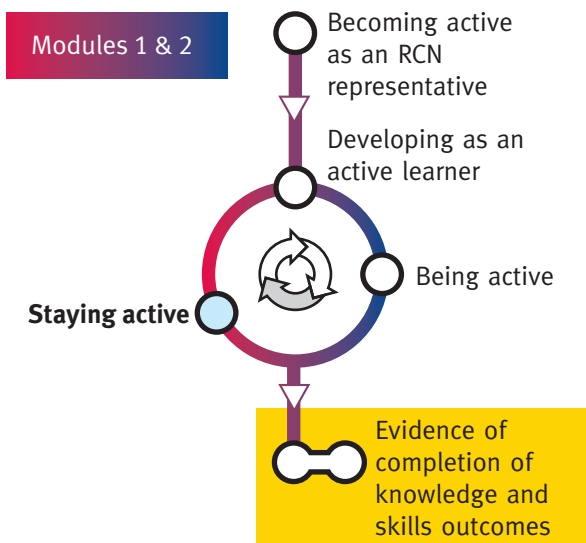
### 3. Being active

- Identifying and progressing a work-based issue
- Supported work-based learning



### 4. Staying active

- Ongoing support and development following the principles of life-long learning
- Completion and 'signing off' an evidence-based portfolio that demonstrates learning/competence against agreed standards



Staying active	
Identifying and accessing support mechanisms	Using and developing support mechanisms
Identifying and accessing learning and development opportunities and resources	Using and developing opportunities and resources

The knowledge and skills acquired on the pathway are organised around the following key themes:

- representing
- negotiating
- communicating
- campaigning
- organising
- influencing.

Facilitated workshops focus on knowledge and skills development, while supported and work-based learning helps representatives to progress their personal development plans. While on the pathway, representatives' learning and development are supported by a range of resources including: guidance sheets, resource sheets, information briefings, e-learning and accessing specific areas of the RCN website.



## 5. Module 1 – the shared foundation module



This is a five-day programme and is made up of both a facilitated workshop element and work-based supported learning. Module 1 is designed as a general introduction to the RCN and the essential role of representatives. The module focuses on the RCN generic role descriptors and representatives will be expected to complete a mandatory learning portfolio that demonstrates their understanding of these and how they can be applied in the workplace. Representatives will also be expected to develop and maintain a personal development plan in relation to their role.

All representatives attend Module 1 which creates an excellent opportunity for developing joint working between representatives in the future. The module is based on national occupational standards for trade union representatives in the workplace (ENTO standards).

### How to access Module 1

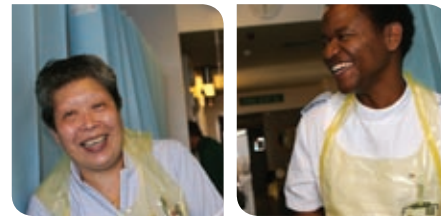
Newly accredited representatives will be allocated a place on a Module 1 course upon accreditation and are expected to begin Module 1 as soon as possible after being accredited. Programme dates are contained within the supplementary information pack supplied with this guide.

“

There are many skills that I have developed as a representative and drawn upon as a nurse. I have improved my skills in communication, personal and people development, service improvement, quality and equality and diversity. These skills can only enhance my future career opportunities.”

Raquah Shahir  
*steward*

## 6. Module 2 – the specific development module



When a representative has demonstrated an understanding of the generic role descriptors through their learning portfolio, they can undertake Module 2. This module is specific to the role of either steward, safety representative or learning representative. The focus of each specific module is on facilitated learning, using the knowledge and skills already acquired in the workplace to develop and build up confidence. Module 2 has been designed to help representatives learn about the specifics of the RCN steward, safety representative or learning representative role.

This is a five-day programme and is made up of both a facilitated workshop element and work-based supported learning. During this module, representatives will be expected to continue to develop their personal development plan and learning portfolio. They will also need to demonstrate their understanding of the relevant specific role descriptors and how they can be applied in the workplace. The module is based on national occupational standards for trade union representatives in the workplace (ENTO standards).

### How to access Module 2

When it is agreed that a representative has completed Module 1, the representative should apply for the next available Module 2 in their region/country. It is expected that they will start Module 2 as soon as possible after completing Module 1 (depending on programme availability). In addition, they will submit their portfolio for sign off within four weeks of having undertaken the final study day of Module 2. Programme dates and nomination forms are contained within the supplementary information pack supplied with this guide.

“

My role as a learning representative is instrumental in helping people across the workplace to gain the confidence to embark on the skills training they need to succeed. My experience has been beneficial in helping my colleagues to improve both their skills and career prospects.”

Pauline Harrison  
*learning representative*

## 7. Continuing professional development



A number of learning and development opportunities are available for those who have completed Modules 1 **and** 2 or are experienced representatives. With local support, representatives will be able to maintain their personal development plan through accessing local and national opportunities, and should continue to develop their portfolio in both learning and practice. These could include workshops, shadowing more experienced representatives or attending events and conferences.

### How to access CPD opportunities

Details of workshops, programmes and events (and how to apply) are outlined in the Information pack supplied with the *Continuing professional development for experienced RCN representatives and other activists in England* (publication code 003 846) guide.

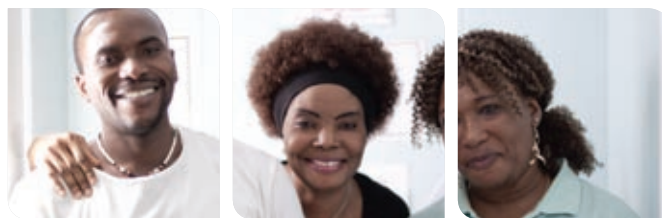
“

“Undertaking the Module 2 pathway reminded me that there is legislation to support safety representatives in their role.

Networking with other reps, accessing other RCN learning and development opportunities and mandatory training from my trust have given me the opportunity to meet many different people. This has given me the confidence and knowledge to approach senior managers within the trust about issues that will protect staff and patients.

The portfolio allows me to continue to document what I have learned. Keeping the evidence organised in one place makes it easier to find when I need it to support my colleagues or other activists. The time I spent producing it has been worthwhile.”

Mitzi Wilson  
safety representative



## 8. The learning portfolio

As part of Module 1, newly accredited representatives will undertake a self-assessment based on the RCN representatives' generic role descriptors. This helps newly accredited representatives to explore their understanding of the role and create a personal development plan.

This personal development plan will become part of a portfolio that representatives start in Module 1, which is an ongoing record of learning and development. During Modules 1 and 2, this is primarily a **learning portfolio** which explores a representative's **understanding** of the role descriptors and how they can be applied in the workplace.

Representatives are expected to submit their portfolio to the learning and development facilitator at the end of Module 1, as evidence that they have achieved the learning outcomes of the module and to demonstrate an understanding of the generic role descriptors.

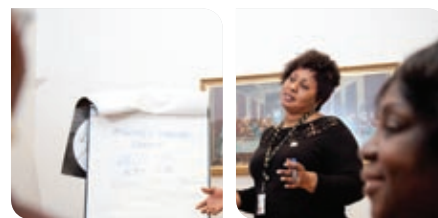
When the representative has received feedback from the learning and development facilitator that the portfolio demonstrates learning against the generic role descriptors, the representative will then be able to progress to Module 2. As part of Module 2, representatives undertake a self-assessment based on the relevant specific role descriptors and will need to update and develop their personal development plans from Module 1. Representatives will be expected to continue to develop their portfolios; this is still primarily a learning portfolio exploring their understanding of the specific role descriptors. Representatives will be expected to submit their portfolio again at the end of Module 2.

The portfolio is an essential part of the pathway and representatives will not be able to progress to Module 2 without having submitted their portfolio and, similarly, they will not complete Module 2 if they do not re-submit their updated portfolio at the end of Module 2.

When representatives have completed Modules 1 and 2 they will be expected to maintain their personal development plans and portfolios as part of their continuing professional development. At this stage the portfolio will then encompass practice as well as learning.

“ I found it easy to complete the portfolio as I had learned to be more organised on Module 1. Don't leave the portfolio to the last minute as it needs to be an evolving document that demonstrates your growth as a representative. ”

Victoria Sharman  
*learning representative*



## 9. Transition arrangements

RCN representatives who have already attended part of a programme prior to the introduction of the learning and development pathway still have the opportunity to access all the learning and development opportunities outlined above.

Representatives who have completed the 'old' introductory days, but have not yet proceeded to a specific development module, may wish to undertake Module 1. Alternatively, a learning agreement can be established with the local learning and development facilitator to:

- identify a mentor
- undertake the self-assessment for Module 1 and develop a personal development plan, based upon the generic part of the role descriptors
- establish if any parts of the facilitated and supported learning need to be undertaken
- demonstrate that the learning outcomes of Module 1 have been achieved and the generic role descriptors are understood.

This agreement will allow the representative to proceed to Module 2.

Representatives who have completed only **part** of the specialist programme (for example, the first part of the health and safety programme or stewards part 1) can choose to attend all of Module 2, or establish a learning agreement with the local learning and development facilitator to:

- identify a mentor
- undertake the self-assessment for Module 2 and develop a personal development plan, based upon the specific role descriptors
- map experience against the learning outcomes of Module 2

- establish if any parts of the facilitated and supported learning need to be undertaken
- demonstrate that the learning outcomes of Module 2 have been achieved and the specific role descriptors are understood.

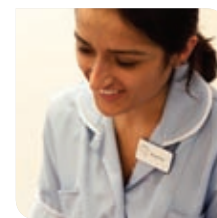
RCN representatives who have already completed their full training prior to the introduction of the learning and development pathway\*, have the opportunity to either attend all of Module 2 as a refresher or demonstrate their learning against the generic and specialist parts of the role descriptors, with the support of the learning and development facilitator or local office.

“

The module was a different format to my induction training. I got to work with every member in the group and the facilitator made the experience both educational and pleasurable. I was able to find out everything about this new role and the associated responsibilities. I hope that I will be able to carry out my role successfully and be a good representative.”

Janet Beardsley  
steward

\* The learning and development pathway was introduced in England in April 2008, in Scotland and Northern Ireland in April 2009 and in Wales in April 2010.



## 10. Learning and development support

Representatives are supported on the pathway by the learning and development facilitator or staff member who delivers the pathway in that region/country along with a mentor. The mentor is usually an RCN officer or assistant officer but could also be a person from the region who has responsibility for activists' learning and development.

The RCN Mentorship framework ensures that all RCN stewards, safety representatives and learning representatives, whether newly accredited or highly experienced, will not only benefit from the learning and updating provided by the learning and development pathway, but will receive one-to-one support and guidance from a named mentor throughout their time as a representative.

The framework enables RCN mentors to support the lifelong learning and development of representatives, equipping them to give an effective and high quality service to RCN members. It is a way of ensuring that consistent, local support is available to all our representatives across the UK, providing them the opportunity to develop the skills and confidence they need to deliver these benefits within their organisations.

The RCN mentoring process has been designed to give representatives the support they need to build on the learning outcomes from Modules 1, 2 and 3 of the learning and development pathway, and to develop their practice skills in the workplace. Two sets of standards have been developed from the nationally recognised standards to make sure the

process is of the highest quality. The relationship standards ensure that the mentor and the representative build a solid and effective working relationship, while the practice standards act as a guide to every RCN representative's learning and development, making them confident and fully competent in all aspects of the role.

For more information please visit the resources page within the RCN activists section of the RCN website ([www.rcn.org.uk/support/activist](http://www.rcn.org.uk/support/activist)).

“

I started Module 1 with some reservations but the learning experience far exceeded my expectations. The support and help from my learning and development facilitator, RCN staff and other reps has been invaluable. I've just completed my Module 2 portfolio and am pleased with how much I've already been able to achieve. I'm looking forward to my new role and the benefits it will bring to my colleagues and patients.”

Karen Dutton  
*safety representative*



## 11. Information pack

Information packs have been produced to cover England, Northern Ireland, Scotland and Wales. The relevant pack has been supplied with this guide and outlines contact details, course dates and locations within the representative's region/country. It also includes information on how to access Module 2.



## Role descriptors for RCN representatives (in full)

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### Generic role: steward, safety representative and learning representative

1. Works within the RCN Dignity Charter and promotes the values held in the charter
2. Communicates effectively with RCN members, RCN staff, branches, employers and other RCN stakeholders on a range of issues, across a range of different contexts
3. Develops personally and professionally using a variety of approaches
4. Contributes to the ongoing development/support of RCN members in the workplace
5. Maintains high quality in all areas of work and practice
6. Acts in ways that promote equality and diversity
7. Assists in marketing activities on behalf of the RCN
8. Represents, promotes and supports the policies and policy-making processes of the RCN
9. Supports and promotes campaigns which are appropriate to central and local needs, circumstances and resources and are in line with agreed priorities
10. Contributes to member recruitment and retention policies and practices
11. Working in partnership with branches, plans, implements and coordinates local structures and processes to enable local member participation and involvement
12. Where appropriate, consults/works in partnership with employers about carrying out any activities in relation to RCN members
13. \* Negotiates with employer for reasonable paid time off from employment to carry out trade union duties



13. Time off provisions for trade union officials were brought together in sections 168-170 of the Trade Union and Labour Relations (Consolidation) Act 1992. Section 43 of the Employment Act 2002 added a new right for **union learning representatives** to take 'reasonable' paid time off during working hours to undertake their duties and to undertake relevant training (Reference: Advisory, Conciliation and Arbitration Service (ACAS) Code of Practice – Time off for trade union duties and activities (2009) effective from 1.1.2010).

Specifically under Section 4 of the Safety Representatives and Safety Committee Regulations 1977 an employer has to permit a **safety representative** to take such time off with pay 'as shall be necessary' to 'perform their functions and undergo such training as would be reasonable' (Reference: Advisory, Conciliation and Arbitration Service (ACAS) Code of Practice – Time off for trade union duties and activities (2009) effective from 1.1.2010).

Officials are entitled to paid time off where the duties are concerned with:

- Negotiations with the employer about matters which fall within section 178(2) of the Trade Union and Labour Relations (Consolidation) Act 1992 (TULR(C)A) and for which the union is recognised for the purposes of collective bargaining by the employer; or
- Any other functions on behalf of employees of the employer which are related to matters falling within section 178(2) TULR(C)A and which the employer has agreed the union may perform.

In Northern Ireland the provisions relating to time off for study or training are the same but are contained in different legislation. Further guidance is contained in the Labour Relations Agency (2004) document, Code of Practice: Time Off For Trade Union Duties & Activities (Including guidance on Time Off for Union Learning Representatives).

**Note:** These role outlines will be reviewed on an annual basis taking into account revisions to legislation where appropriate.



### Specific role: RCN accredited trade union steward

**Summary of role:** To support and represent members in the workplace, protecting their workplace employment rights and ensuring members are treated fairly.

1. Prepares and presents cases on behalf of RCN members
2. Supports, advises and represents RCN members in the case of grievances, employer's disciplinary procedures or employment conditions and practices dealing with issues such as equal opportunity or job evaluation
3. Helps RCN members to understand the likely outcome of cases and how this may affect their employment status
4. Contributes to the prevention and resolution of disputes in the workplace
5. Establishes, maintains and improves partnership arrangements with employers
6. Contributes to the formulation and implementation of a collective bargaining strategy
7. In partnership with employers, influences positive employment relations through review and development of employment policies
8. Provides information and advice to RCN members on matters relating to employment rights
9. Identifies appropriate information to use in individual/collective cases of representation
10. Directs RCN members to information and resources to enable RCN representatives and members to protect their employment rights and ensure fair treatment in the workplace



**Specific role: RCN accredited trade union safety representative**

**Summary of role:** To ensure the health, safety and welfare of all staff/members in the workplace by promoting and implementing a safety culture where members can work in a safe and healthy environment.

1. Negotiates and represents the health and safety interests of RCN members at work
2. Obtains information on health and safety issues, advising those RCN members who are being represented
3. Encourages others to adhere to health and safety procedures
4. Contributes to the control of risk in the workplace and contributes to risk assessments
5. Carries out safety inspections in the workplace
6. Represents the RCN on health and safety committees and takes action to influence the development of a positive safety culture in the workplace
7. Works jointly with employers to ensure compliance with health and safety legislation:
  - Observes the Management of Health and Safety at Work Regulations 1999
  - Observes the regulations, codes of practice and guidance in relation to the role and function of safety representatives and safety committees – outlined in the Safety Representatives and Safety Committees Regulations 1977
  - Observes the Health and Safety at Work etc. Act 1974\*
8. In partnership with employers, contributes to advising, supporting, maintaining and improving the health, safety and security of members in the workplace
9. Influences the workplace organisation to work towards a healthy working environment
10. Investigates potential hazards and dangerous occurrences in the workplace and makes recommendations for action to prevent any future accidents
11. Represents RCN members on matters related to workplace accidents/incidents
12. Provides information and advice to RCN members on safety related issues
13. Identifies appropriate information to use in matters related to health and safety
14. Directs RCN members to information and resources to enable RCN representatives and members to promote health and safety in the workplace

\*7. There exists local interpretation/implementation of these laws within Scotland, Northern Ireland and Wales. These can be cross referenced from the above documents and through the Health and Safety Executive.

**Specific role: RCN accredited trade union learning representative**

**Summary of role:** To support the learning and career development of RCN members in the workplace through enabling members to meet continuing professional development requirements for safe and effective practice.

1. Promotes the value of learning and training in the workplace
2. Supports members in analysing their learning or training needs
3. Keeps up to date with learning opportunities
4. Contributes to the development of a learning organisation
5. Supports the development and implementation of a workplace learning strategy
6. Negotiates, and supports continuing professional development in the workplace
7. Promotes access to lifelong learning
8. Supports local and national policies, initiatives and campaigns which promote learning
9. Supports RCN members in planning and managing their learning
10. Directs RCN members to information, resources and support systems that enable access to learning opportunities and resources, for example the RCN Learning Zone and R&D Co-ordinating Centre
11. Contributes where appropriate to the organisation of learning opportunities to meet RCN members' learning needs
12. Provides information and advice to RCN members on learning related issues
13. Identifies appropriate information to use in matters related to member learning





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