

**A study into the use of Self-Efficacy and Confidence measurements,  
as Indicators for role performance and delivery, in Trade Union  
Representatives Training.**

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## DECLARATION

I certify that this work has not been accepted in substance for any degree, and is not concurrently submitted for any degree other than that of Doctor of Education being studied at the University of Greenwich. I also declare that this work is the result of my own investigations except where otherwise identified by references and that I have not plagiarised another's work.

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This research is dedicated to all those volunteers who give up their time and put so much energy into the work of improving workers lives; the trade union representatives. The biggest acknowledgement goes to them through the words of the following (anonymous) poem:

“Who is the worst paid man today?  
With haggard look and hair turned grey,  
Who’s blamed when things do not go right?  
Who gets no rest, day or night?

Though never having been to college  
He must possess the widest knowledge.  
On rates of pay and hours of labour  
and how to keep peace with ones neighbour.

Of income tax and how to pay it,  
What’s best to say and when to say it.  
The how and why and which and when,  
of all the problems known to men.

If with the foreman he’s agreed  
He’s sold the men or been weak kneed.  
When for the men he tries to cater  
He’s called a blinkin’ agitator.

Who is this chap? What! Don’t you know him?  
Or how much you really owe him?  
This chap, whose torment is assured,  
Is no one else than your Shop Steward!”

## **ABSTRACT**

This thesis focuses on an aspect of the professional work of the author: that of the training of local trade union representatives by trade unions to ensure they are competent, capable and confident in the delivery of their role in local workplaces. It considers the four levels of evaluation of training outlined by Kirkpatrick (1994) and proposes the use of confidence scales as a means of demonstrating levels of evaluation in this field of training.

Trade unions are reliant on the many members that volunteer to be local (unpaid) representatives in their own work places. To ensure the union provides an adequate service to its fee paying membership it needs to support and train its volunteers so they become competent, capable and confident in their roles. This research considers the effects on those volunteers who have attended training courses provided by the union trainers. It draws on the research on confidence levels and examines practice from a range of trade unions across European countries. Three types of training course are the focus for the study; as the thesis will look at whether or not the confidence levels of trade union representatives differ depending on the type and delivery method of the course they attend and whether or not this will have an impact on their post-course behaviour in the workplace.

A research tool (questionnaire) was developed to measure the responses of participants attending courses and the results compared using Chi-square statistical tests to consider any results that were of statistical significance.

The study concludes that statistically significant higher confidence levels are reported on the 2+2+2 mode of delivery of the six day training course in comparison to either the traditional 5 day or the mixed method modes of delivery. It recommends the use of confidence measures as a useful concept in the evaluation of training courses for union representatives as a way of improving value for money and return on investment for unions and a better developed trade union representative for the future.

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# **1. INTRODUCTION**

## ***1.1 Introduction***

The aim of this introductory chapter is to contextualise and explain the reason for this study into Trade Union Representatives' training, within the health service setting, and the use of self-efficacy and confidence measures as indicators for role performance and effective delivery. It will focus on the issue of evaluation and its importance within the trade union movement with regard to the training it provides to its representatives. The importance of this study and related background will be examined in order to conceptualise the issues; it will provide the aims and objectives for the enquiry and the research questions that will structure the research. In addition, the original contribution that I hope this study will bring to the world of education and training of trade union representatives will be considered. Burgess et al (2006) suggest that the journey described by a researcher can be considered as part of their growth of their professional Knowledge.

## ***1.2 Background and ideology of this study***

When I started my working life in 1983, after leaving school, little did I realise that I would become heavily involved in the trade union movement and specifically interested in the education and training of the trade union representative. Having filled my summer before commencing nurse training with a casual job in landscape gardening and horticulture I witnessed how non unionised individuals were treated whilst at work, by their employer. Members of the team seemed to come and go, often at the whim of the supervisor, to be replaced by what appeared to be an endless supply of willing people.

I was not to understand the importance that a trade union could make a difference for workers until my own experience, following a nasty incident whilst in the workplace, in public service. Following that moment I became increasingly involved in my own trade union as I completed my nurse, health visitor and teaching education and my Masters degree. In 1990 I moved into the trade union world, employed in a full time capacity rather than as a volunteer.

A large part of the last 20 years has seen me involved in the issues around the education and training of trade union representatives, similar to that described as a Shop Steward in the poem in the acknowledgements. Those that take up the union representative role often find themselves in a thankless situation, often blamed and not often thanked. The aim of this study is to consider how we best ensure that these individuals are supported in these roles; how we evaluate the success of the training and education programmes provided to these people to ensure they are best equipped for their role, and above all, whether the programmes provided give trade unions good value for money when considering the overall service they provide to their membership. In his research on internet training within trade unions, Walker (2002) points out that given the increasing difficulty that representatives have in accessing paid time off for the more traditional union education programme it would seem likely that there will be an increasing demand for other forms of training in the future. Trade unions will need to ensure these new and developing forms of training continue to be 'fit for purpose' and provide the right input to benefit the representatives (Walker, 2002).

### ***1.3 Originality of this research***

Phillips and Pugh (2000) discuss 15 definitions of originality. They include looking at areas that people in a discipline haven't looked at before and adding to knowledge in a way that hasn't previously been done before (Phillips and Pugh, 2000). Originality is possible in terms of topic, approach or presentation and the element of originality is likely to be very small as it is highly unusual to find highly original research (Blaxter et al., 2002a).

This thesis investigates an area of work in a novel way using concepts drawn from unrelated fields. It approaches the evaluation of Trade Union training in a novel way through the application of two key concepts; self-efficacy and confidence measurements, and the use of Kirkpatrick's (1994) four levels model of training evaluation from the corporate business world. These measurements, though commonly used in other fields, e.g.: mental health nursing (Ootim, 2000); group work, communication, project planning and management and personal awareness (Alpay and Walsh, 2008), Doctor's resuscitation techniques (Marteau et al, 1990), career development (Rottinghaus et al, 2003) (Borgen and Betz, 2008), Employees and work related behaviours (Noe, 2005) (Sadri and Robertson, 1993a) and mathematics (Carmichael and Taylor, 2005), have not been applied together to the

evaluation of trade union representatives training generally, or to trade unions, such as the Royal College of Nursing, in the health sector, specifically. Literature is nonexistent on the use of confidence scale measurements in conjunction with the four levels of evaluation (Kirkpatrick, 1994) in the field of evaluation of trade union representatives training.

I had ascertained through a visit to two other countries in Europe that the evaluation of trade union representatives training would be a new concept. On my return to the UK I used my networks within the trade union movement to gauge the level of use of this type of work. I wrote to 126 trade union educators across the country approaching them for their views on the use of self-efficacy/confidence scales in the evaluation of trade union representatives training courses. Although, only two responses were received, they confirmed that there was no evidence of this type of evaluation in this area of work.

The purpose of my study is to find and use useful concepts and models that could be adapted for use to demonstrate the effectiveness of trade union representatives training. In turn, through the use of a model that demonstrates effectiveness; further use can be made for the future planning of courses and training programmes for trade union representatives. This can be seen as using already known material but with a new area of use. As someone very closely involved in this work I realise that I cannot observe this area of study as a disinterested outsider and thoroughly objectively. As Muijs (2004:p5) suggests, the post-positivist will try and represent reality as best they can rather than finding the truth; they will focus on the confidence of how much their results can be relied upon rather than on certainty and absolute truth. Realising these limitations, others have advocated a pragmatic approach: the use of whatever philosophical or methodological approach that works best for a particular research problem. This often leads to a mixed method approach to study where both quantitative and qualitative approaches are adopted (Robson, 2002). Therefore this piece of research, carried out in 2004-08, is bound in time and offers a unique contribution to this field. It may well be necessary to follow this study with further research of a qualitative nature to support or develop the findings further. This will be considered as part of the conclusions and recommendations.

### ***1.4 Research Questions***

Trade Unions spend a lot of resources, financial and human, training and supporting their volunteer representatives to carry out roles in local workplaces for and on behalf of members of the organisation. Unions either provide this training through in-house arrangements, through consultant trainers or through the TUC training services. However, there is very little measurement of the effectiveness of this training on the individual's delivery of the role at a local workplace level. This research project will look at the use of self-efficacy and confidence measurements as a way of assisting to determine effectiveness in delivery of the role. It will consider the three types of courses provided and whether or not confidence levels are affected by the type and delivery method of the training course.

The key research question is:

**Does the confidence level of trade union representatives differ depending on the type and delivery method of the course that they attend?**

In addition to this overall question a number of supplementary questions will also be considered as part of this research:

- Will the mode of training impact on the post-course behaviour of participants?
- Can the confidence levels of trade union representatives, as course participants, predict the transfer of the knowledge and skills learned on a course into the local workplace to demonstrate their effectiveness to deliver in their trade union role?
- Are those representatives with higher confidence levels more likely to carry out the specific activity they express confidence over than those with low levels of confidence?
- Can confidence levels in trade union training act as a marker for the transfer of skills from training to practical local use?

### *1.5 Summary*

In this introductory chapter I have aimed to explain to the reader the reasons for this study; the importance of trade unions being able to justify their resource allocation on the training of representatives. I have outlined some background as to why I believe this is an important issue for me in my professional life but also the wider trade union movement. My visits to Sweden and Germany, which in addition to the UK, provide good training opportunities for their union representatives have given me a deeper insight into the complexity and magnitude of the issue. It appears very rare for unions to carry out the in-depth evaluation of the effectiveness of the training programmes that will be needed in the future to argue good value for money in tight financial times.

In most cases this is probably because those in charge of these training programmes have not investigated a method that would be suitable for use in these circumstances; in others it is purely the time constraints involved that get in the way. This appears to be no different to companies and businesses. Tamkin, Yarnall and Kerrin (2002) suggest that many organisations are not satisfied that their methods of evaluating training are rigorous or extensive enough to answer questions of value to the organisation.

For this reason it is my belief that this research into the use of confidence scales is unique in this particular area of professional activity. The next chapter will describe how these concepts have been used in other areas of work to demonstrate the benefits of such use in the evaluation of trade union representatives training programmes.

## **2. LITERATURE REVIEW**

### ***2.1 Introduction***

The introductory chapter outlined the reasons why this study was of importance and described some of the background to assist in the understanding of these reasons. During the course of this chapter, the importance of evaluation of courses related to the organisation I worked for at the time of the study is examined, putting into context the reasons for the research. The concepts that are considered important in this work are related to the specifics of the research to demonstrate the originality of the work.

### ***2.2 Background***

Trade Unions focus a large percentage of their work on the representation of their members within their workplaces. In order to do this successfully they develop and support members, who become elected and accredited, to represent work colleagues on behalf of the union through roles such as, steward employment representatives, safety representatives and learning representatives. In order to ensure some form of standard level to this voluntary representation the union aims to provide training, support and mentorship.

The Royal College of Nursing of the United Kingdom (RCN) [the organisation in which this study took place] provides its voluntary representatives with many different learning opportunities to increase and improve their representational knowledge and skills. Following many of these opportunities, participants complete post course evaluation which should be used to address any deficiencies and raise the standard of the events offered. Currently this evaluation process concentrates on examining the course participants reactions to a particular course attended. Kirkpatrick, as early as 1994, describes this level as customer satisfaction and suggests training should be evaluated using four levels:

1. Reaction – customer satisfaction;
2. Learning – assessing what objectives of the training participants can do;
3. Behaviour – assessing the application of the learning back in the workplace;

4. Results – assessing the effect of the learning on the organisation as a whole. (Kirkpatrick, 1994, Kirkpatrick, 2006).

<b>Level</b>	<b>Description</b>
Level 1 : Reaction	Measures how the participants react to the training programme; customer satisfaction. Often referred to as “happy sheet” evaluation. If participants do not react favourably they probably will not be motivated to learn. Positive reaction may not ensure learning but negative reaction almost certainly reduces the possibility of learning occurring.
Level 2: Learning	Defined as the extent to which participants change attitudes, improve knowledge and/or increase skill as a result of attending the training programme. In order to evaluate learning specific objectives of the training programme must be determined.
Level 3: Behaviour	Defined as the extent to which change in the participants’ behaviour has changed because they attended the training programme. In order for change to occur the participant has to have a desire to change; they must know what and how to make the change; they must have the right environment around them and they need to be rewarded for the change.
Level 4: Results	Defined as the final result that occurs because the participant attended the training programme. This could include increased productivity, improved quality, decreased costs, increased sales, reduced turnover, higher profits, etc.

Noe (2005) describes formative evaluation aimed at improving the training course and summative evaluation aimed at assessing outcomes; are participants doing something differently following the training? Are they using new skills learnt? Is there a return on the investment of training made? At the end of the day, for any organisation asking the question, “what should training do?” part of the answer should include something about the participants feeling more capable to do whatever they have been asked to or trained to do. Furnham (2005) suggests all courses have multiple aims but those in the business of skills teaching should be aiming to be able to do something that is relevant to the participants role and of value to them; an opportunity to get to know others better within the relevant organisation; maybe about renewing the faith in the organisation; and of course the psychological, maybe propagandist, selling the ideology of the organisation.

The objective of this literature review is to consider the use of measuring self-efficacy, confidence, capability and competence of trade union representatives following training opportunities and building on the levels of evaluation as described above. The following databases were searched; Zetoc, Emerald, Ebsco Host, Dialog Datastar, and Blackwell Synergy.com. Using *Self-efficacy*, *Confidence* and *Competence* as key words for searching reveals a large number of records as these are well researched and written about concepts. When combining these keywords with *Training*, again a large number of records are available demonstrating the use of these concepts in this area of work. However, when combining these keywords with *Trade Unions* or *Trade Union Representatives*, 42 records were displayed and examined by the researcher. None of these journal articles referred to the use of Self-efficacy confidence scales in relation to the effectiveness of training provided for Trade Union Representatives. This would be a new area of study for the application of some of these well used concepts.

### ***2.3 Definitions: Self-efficacy; Capability; Competence; Confidence***

Self-efficacy is a widely researched concept that focuses on a person's subjective sense of mastery and control in challenging situations. If a person perceives themselves as likely to be effective in such a situation, they will experience less distress during the encounter and possibly manage it more effectively. Holloway and Watson outline the emergence of the concept from the Social learning theory and relate it closely to other theories; Conditioning, Operant conditioning, Locus of control, Reasoned behaviour, Planned behaviour, Learned helplessness and Attribution (Holloway and Watson, 2002). In the union representative training context it was reported that course participants felt more confident as they were more aware of their own abilities following basic IT courses (Moore and Ross, 2008).

Self-efficacy is recognised as a construct useful for nursing due to its role as a mediator of behaviour change and arousal in a variety of areas (Ootim, 2000). In his study on attitudes towards aggression in mental health nurses the author suggests that more experienced nurses and those with a strong sense of personal accomplishment were found to be more tolerant of aggression. He surmises that this may be due to a strong sense of self-efficacy drawn from numerous successful experiences in managing aggression (mastery) (Whittington, 2002).



Bandura (1977, 1982, 2001) defines self-efficacy as peoples judgements of their capabilities to organise and execute courses of action required to attain designated types of performance. Stevens and Gist (1997) refer to it being about a self-perceived capability for task performance. Individuals with low self-efficacy will imagine difficulties as more formidable than they really are. This creates stress and impairs performance by diverting attention from how best to deal with the situation to concerns over failings and mishaps. However, those with high self-efficacy scores are inclined to concentrate on how to deliver the task and deal with the situation and overcome any obstacles. In the context of training for employee's Noe (2005) describes self-efficacy as employee's belief that they can successfully perform their job or learn the content of a training course.

The Concise Oxford Dictionary lists a number of descriptors for capability and competence which cross over and inter relate; ability, effective, attainment, adequately qualified, legitimate, proficient, mastery, skill, knowledge, effective, expertise, experienced, dependable and fit for purpose. In defining confidence the dictionary lists firm trust, assured expectation, self-reliance, boldness, impudence, trusting, fully assured, faith and conviction, reliance, credence, self-assured, certainty, certitude, courage, sprit and nerve. One can see the importance and applicability of these descriptors in relation to the roles described earlier, needed by trade unions. The assumption is that those representatives who participate in training and profess to have high self-efficacy scales are more likely to feel confident and meet a certain level of competence and capability than those with a low self-efficacy.

Zarola and Leather (2006) suggest that capability is not just about skills but what people believe they can achieve with the skills they have. In fact, confidence plus more.

#### ***2.4 Evidence of the use of these concepts***

Self-efficacy is a judgement of capability by an individual to perform a task; outcome expectations are judgements about the outcomes that are likely to flow from such performances (Bandura, 2001). It would appear sensible to concentrate measurement of self-efficacy of course participants at Kirkpatrick's level one, two and three and consider outcome levels also in level three but most prominently in level four. Bandura suggests that items of a self-efficacy scale should be phrased in

terms of *can do* rather than *will do* as *can* is a judgement of capability. Among the types of thoughts that affect action, none is more central or pervasive than peoples' judgements of their capabilities to deal effectively with different realities. It is partly on the basis of self-perceptions of efficacy that they choose what to do, how much effort to invest in activities, how long to persevere in the face of disappointing results, and whether tasks are approached anxiously or self assuredly (Bandura, 1986).

When measuring the confidence levels of house officers in a hospital to perform resuscitation techniques, research found that the confidence levels of the doctors were increased with experience of resuscitations but their skill levels were not. Although this was only a small study of 28 participants, they concluded that experience is no substitute for training; in fact they suggested giving further feedback on performance during training as well as pointing out the erroneous confidence that experience sometimes brings, may improve the relationship with confidence and competence (Marteau et al., 1990).

In a review and meta-analysis of 21 studies of self-efficacy and work related behaviour (Sadri and Robertson, 1993b), it was found that there was clear evidence of a positive relationship between self-efficacy and performance and self-efficacy and behavioural choice. Furthermore they suggest that the link between efficacy and performance is stronger in simulated tasks than in real ones. This may have something to do with the environmental variables in existence in real life tasks and they recommend further studies to consider using both real and simulated tasks in order to look deeper into this issue.

A number of meta-analyses across different areas of functioning confirm the positive role that individuals perceived self-efficacy has an effect on their human self-development, adaptation and change (Holden, 1991, Holden et al., 1990, Moritz et al., 2000, Multon et al., 1991, Sadri and Robertson, 1993b, Stajkovic and Luthans, 1998). Bandura (2001) outlines the key role of efficacy in human functioning, suggesting its impact can affect goals and aspirations, outcome expectations, affective proclivities and perception of impediments and opportunities in the social environment;

*“Efficacy beliefs influence whether people think erratically or strategically, optimistically or pessimistically. They influence the courses of action people choose to pursue, the challenges and*

*goals they set for themselves and their commitment to them, how much effort they put forth in given endeavours, the outcomes they expect their efforts to produce, how long they persevere in the face of obstacles, their resilience to adversity, the quality of their emotional life and how much stress and depression they experience in coping with taxing environmental demands, and the life choices they make and the accomplishments they realize” (Bandura, 2001: page 3-4).*

Bandura (1982) suggests that self-efficacy measurements are good predictors of subsequent behaviour. Using a micro analytic research strategy it is suggested that self efficacy scores may be affected in the negative if they are performed in public. In this paper he reviews different lines of research, demonstrating that self-efficacy may have wide power of explanation of a number of human behaviours, ranging from physiological stress reactions to collective self-efficacy.

One of the limitations of many of the studies on self-efficacy is the use of a self-report measure. Participants report their own level on the scale used. This prevents researchers from making causal conclusions regarding the relationships they report (Saks, 1995). Future research should consider including some form of objective measurement of effect from some place other than the participants, for example; the organisation they work for or, in this case, the Trade Union they act as representative for in the workplace.

## ***2.5 Evaluation and training***

There are numerous definitions of what evaluation is. Boulmetis and Dutwin (2005) share two with their readers:

- 1. Evaluation is the systemic process of collecting and analyzing data in order to determine whether and to what degree objectives have been or are being achieved.*
- 2. Evaluation is the systematic process of collecting and analyzing data in order to make a decision. (Boulmetis and Dutwin, 2005)*

In discussing educational evaluation Bennett (2003) draws on 12 differing definitions from a source of authors:

- The process of determining to what extent educational objectives are being realized by the programme of curriculum and instruction
- The collection and use of information to make decisions about an educational programme.
- Its purpose is to see whether curriculum objectives are being or have been, achieved.
- Evaluation is concerned with securing evidence on the attainment of specific objectives of instruction.
- Curriculum evaluation refers to the process or processes used to weigh the relative merits of those educational alternatives which, at any given time, are deemed to fall within the domain of curriculum practice.
- Educational evaluation is the process of delineating, obtaining and providing useful information, for judging decision alternatives.
- Evaluation as illumination.
- Systematic examination of events occurring in and consequent on a contemporary programme – an examination conducted to assist in improving this programme and other programmes having the same general purpose.
- The assessment of merit or worth.
- Evaluation can provide a means for translating an educational idea into practice as well as monitoring and enhancing curriculum development.
- Educational evaluation is about social planning and control.
- Evaluators are interested in discerning the effects of interventions over-and-above what could have been expected if the intervention had not been applied.

It is apparent that all the definitions include and focus on learning and collecting of information and the ability to use this to make future decisions. To be able to answer the vital question, “How effective was the training course?” some form of evaluation needs to be completed. Effectiveness is measured by evaluation, the process of determining value (Moskowitz, 2008).

Much of the literature around evaluation of training comes from the business world. Donovan and Townsend (2008) suggest the field of training evaluation is dominated by a few key contributors which in turn are indebted to Donald Kirkpatrick and his four stages model. They also point out that training evaluation in the corporate environment is focused on nine outcome measures:

- Reaction to training
- Satisfaction with the organisation of a training event
- Acquisition of knowledge
- Improvement of skills
- Changing of opinions and attitudes
- Changing of behaviour
- Resulting effects of training on the organisations success factors
- Return on investment
- Psychological capital affecting corporate image

Companies spend a large amount of resource, both time and financial, in training and development. They hope it will help make their business more profitable, more capable of providing the service or commodity they are focused on, improve individual employability and give them a competitive edge over others. Breakwell and Millward (1995) state that evaluation is an essential tool of management practice; the first step to improving performance, maximising effectiveness and minimising ineffectiveness. In order for organisations to spend wisely they need to invest in good evaluation of training. However, Tamkin et al (2002) suggests that full evaluation evidence is hard to come by, difficult to gather, patchy and incomplete. (Tamkin et al., 2002)

As this research was set within a trade union with membership in the health services it is worth considering the literature around evaluation of training in that particular context. Tian et al (2007) reports that reviews of evaluation methods for Continuing Medical Education demonstrate varying methods, outcome measures and differing follow-up periods. Others call for standardised evaluation methods in their area of

work as objective outcome or performance measures have not been formulated or rigorously evaluated (Chun and Takanishi, 2009) and in their systematic review of evaluation of continuing medical education, Ratanawongsa et al (2008) suggests the need for attention on developing valid evaluation methods.

Although Kirkpatrick's model has been centre stage of training evaluation for a number of decades there are those that voice criticism. Tamkin et al (2002) describes models that have evolved from the Kirkpatrick model and those that are unrelated. They outline models focusing on the purpose of evaluation; models that use different measures; models for evaluating new technology delivery; and models of learning and evaluation. In this review for the Institute for Employment Studies they conclude that the literature suggests that Kirkpatrick's model is still very useful and despite considerable criticism in the literature they would argue the model remains useful for framing approaches to training and development evaluation.

Curran and Fleet (2005) developed the Kirkpatrick (1994) four levels model to consider a medical context rather than a business environment: 1) Learner reaction; 2) Learning outcomes; 3) Performance improvement in the practice setting; and 4) patient or health outcome measuring tangible results that have been influenced by the performance of the learner.

One of the common criticisms is the misunderstanding that the levels in some way form a hierarchy and are arranged in ascending value of information. Kirkpatrick and Kirkpatrick (2007) themselves, addressed this in the most recent practical implementation guide by introducing other elements into the process to assist moving people from knowing what the four different levels are, to implementing them in a way that makes a difference. Having considered the plethora of training evaluation models available I concluded that this research would benefit from the use of the Kirkpatrick model when considering confidence levels of trade union representatives after their training event.

## ***2.6 Self-efficacy and training***

In training terms if participants express high self-efficacy and confidence levels it may suggest they will be more likely to continue the behaviour or put into practice

the skill learnt on the training course. There is some evidence that levels of self-efficacy can be increased by:

1. Ensuring participants are aware that training is to try and improve performance and not to identify areas of incompetence;
2. Providing as much information about the training before the event including the purpose of it;
3. Showing examples of training successes in others;
4. Informing participants they control the learning and they have the ability and responsibility to overcome any learning difficulties they experience (Noe, 2005).

In a study looking at training reputation, self-efficacy, managerial support and pre-training motivation effects on the perceived training transfer, it was found that managerial support and self-efficacy may be relatively less important than training reputation on the perceived transfer of training (Switzer et al., 2005). It is suggested that there is a positive link between the central role of motivation to transfer, performance self-efficacy, peer support, feedback and coaching within the concept of a positive transfer climate (Kirwan and Birchall, 2006).

Saks (1995) highlights a number of studies that demonstrate (a) self-efficacy is particularly relevant for understanding training effectiveness; (b) self-efficacy has been found to play an important role in computer software training, innovative problem solving training, negotiation skills training and self-management of job attendance training. He used this background to develop his own longitudinal study into the moderating and mediating effects of self-efficacy on the relationship between training and the adjustment of newcomers within their first year of employment. This study had three measurement periods, using self-efficacy scales and a questionnaire to measure training, and objective data on performance and turnover from the participants' line supervisor. This study concentrated on measuring work attitudes and behaviour rather than training outcomes. The research was also performed on those in 'live' situations as opposed to well controlled experiments in classrooms. Saks (1995) concludes by suggesting that training and self-efficacy are related positively to the adjustment of newcomers in the workplace and that the

success of training programmes may be improved if they were designed to increase participants' self-efficacy.

According to Peterson and Royalyn (2005) the concept of self-efficacy has been validated in various research fields over two decades as the foundation for human actions. They suggest that human performance is a critical resource to an organisation and trainers will find it wise to include self-efficacy in performance evaluation in the future. They recommend the use of Bandura's (2001) guidelines in devising self-efficacy measurements to aid the identification of performance gaps in order to address them efficiently and effectively (Peterson and Royalyn, 2005).

Investigation has demonstrated that self-efficacy can be strengthened through a number of methods: performance mastery; verbal persuasion and social influence; vicarious learning and emotional arousal (Bandura, 1986, Bandura, 1997). In a study of the achievement and motivation of student social workers during field education it was found that self-efficacy may be enhanced by considering the sources of information people use in developing their sense of self-efficacy (Fortune et al., 2005). One study found that students who expressed doubt about their confidence in one area may also lack confidence in basic academic skills areas and suggested that it may be useful for colleges to focus on strengthening students efficacy beliefs through; performance accomplishments, vicarious learning, anxiety management and social encouragement (Paulsen and Betz, 2004).

Saks (1995) points out that the effectiveness of socialisation programmes may rest in part on the extent to which they strengthen newcomers' self-efficacy. Generally, it would seem that this may apply to most training course programmes and, specifically, it would appear to be the case for the training of trade union representatives. The inclusion of those methods that increase self-efficacy (performing an activity, observing role models perform, receiving verbal encouragement and feedback) scores of participants will equate to an increase in the effectiveness of the training.

Considerable use of self-efficacy and confidence measurements has been used in the field of aggression and violence training for health sector workers (Beech, 1999, Beech, 2003, Collins, 1994, Gertz, 1980, Goodykoontz and Herrick, 1990, Hurlbaas, 1994, Infantino and Musingo, 1985, Lehmann et al., 1983, Martin, 1995, Paterson et al., 1992, Phillips and Rudestram, 1995). Many of these studies report



participants' increased confidence, reduced anxiety and ability to deal with violent and aggressive situations in the workplace. Beech (2003) develops much of the work of these other studies and employs the use of visual analogue scales, Likert-type statements and open responses to scenarios in his rigorous repeated measures longitudinal design to demonstrate that it is possible to provide training that produces desirable, statistically demonstrable and durable change in knowledge, behaviour, attitudes and confidence.

In a recent study for the Health and Safety Executive, Zarola and Leather (2006) developed the use of the concept of 'Capability' as a benchmark criterion for the assessment of effectiveness of training in violence and aggression management training in health care settings. They developed a variant on the random controlled group approach in order to compare with those that had participated in training. They were able to demonstrate that in general, training in violence and aggression management across healthcare organisations is having a positive, but limited, short term benefit. Through the use of a pre, post and follow up questionnaire they showed increased reporting of participants' capability to deal with aggressive or violent incidents. They argue that this research demonstrates the importance of using the concept of capability, both in research and practice, to understand, manage and prevent workplace violence and aggression.

### ***2.7 Use of these concepts in the area of this work***

This literature search has revealed little use of the concepts described within the area of training of trade union representatives. Much of the role of workplace representatives is practical in nature. The current situation appears to suggest that trade unions spend a large resource on the training of representatives. Little evaluation of the transfer of this training to workplaces is carried out which would lead many to suggest that the lack of such evidence could be used to consider the provision of such courses a waste of resources and a reason to discontinue them.

It was found in one study that a number of tasks were not performed by trainees after four months of the training episode and the authors of the paper suggested further research to look at the effects that determine, in the absence of the opportunity to perform on the job, the decay or maintenance of proficiency over time (Ford and Quinones, 1992).

Using self-efficacy/confidence scales with trade union representatives would enable the union to focus in a number of ways:

- Self-efficacy scales should relate to the learning outcomes of the courses and also be connected to actual behaviour performed;
- Self-efficacy scales should be used on a continuum to demonstrate the effectiveness of training (e.g. pre-training, immediately post training, six months following training);
- Self-efficacy scales could be used to aid the focusing of support and help to those most in need;
- Training events should concentrate on methods that increase the level of participants' self-efficacy (e.g. modelling, positive performance attainment, verbal persuasion and physiological feedback) (Bandura, 1986).

Gist and Mitchell relate self-efficacy closely to self-regulation, a comprehensive process of cognitive, individual determination of behaviour (Gist and Mitchell, 1992). When being asked to perform the voluntary, often thankless, task of a trade union representative, one's own regulation of whether or not one is fit for the purpose requested will have a major bearing on the decision to perform. If trade unions can build the confidence and capabilities of its representatives through the use of self-efficacy measurements this will be of benefit to the individuals concerned, the unions' members, the union as a respected body and the organisation in which this service is delivered.

## ***2.8 Summary***

The extensive evidence and development of the use of the self-efficacy concept has been described: Firstly in the field of health related behaviours (Bandura, 1982) and more recently within nursing (Ootim, 2000; Whittington, 2002). The concept has also been used within the area of training and the effectiveness of training (Saks, 1995) and in particular in a number of studies around violence and aggression training with the healthcare environment (Hurlebaus, 1994; Philips and Rudestram, 1995; Lehmann et al, 1983; Gertz, 1980; Infantino and Musingo, 1985; Beech, 1999;

Collins, 1994; Paterson et al, 1992; Goodykoontz and Herrick, 1990; Martin, 1995; and Beech, 2003, Zarola and Leather, 2006).

Many of these studies are carried out in classroom environments and often relate little to the outside world, although, Saks (1995) study widened his research to include input from organisations.

During the course of this chapter I have described the concepts relevant to the study and related the importance of these concepts to the specifics of the research; it is vitally important that trade unions can demonstrate effective courses for its local representatives. Measuring confidence levels would appear to give a trade union an opportunity to do just that. If confidence levels can be used as an indication of someone's ability and a prediction of their future behaviour then this could be used as a clear measure of the effectiveness of trade union representatives training course to prepare these individuals adequately to perform in their role.

### **3. METHODOLOGY**

#### ***3.1 Introduction***

The previous chapters introduced the reader to the reasons behind this study and the importance of them to me and the position I held within the organisation at the time of the study. The use of confidence scales to measure the effectiveness of trade union training for its representatives has been considered. The literature review chapter examined some of these concepts and this methodology chapter will build on that body of work and describe the methodology used in this study.

#### ***3.2 Paradigm: Ontology, Epistemology and Methodology***

In similarity with many studies, in the initial stages, the methodology used for this study could have been from a number of different perspectives; I was keen to use the study to better my professional role and it felt that the only way to truly problem solve the matter would be through the use of multiple methods. What therefore is my paradigm? What makes up the set of assumptions I have about my world? Punch (2009) informs us that a paradigm tells us:

- What reality is like (ontology)
- What the relationship is between the researcher and that reality (epistemology), and
- What methods can be used for studying the reality (methodology)

Early on, through the review of some initial research (Macleod and Daley, 2007), it became apparent that a qualitative approach would not yield sufficient result for decision making processes within the organisation. In addition my own personal circumstances (ill health and resignation from the organisation) limited my ability to progress the study from the quantitative approach through a questionnaire already completed into other methods to support and add to the results found. It is suggested that researchers should look at their topic through new and different lenses: opening up familiar things to alternative ways of seeing (Clough and Nutbrown, 2007) but I would have to resort to make such suggestions as further recommendations of this study. As Robson (2002) suggests: others have advocated a pragmatic approach: whatever philosophical or methodological approach works best for a particular

research problem at issue. This often leads to mixed method studies where both quantitative and qualitative approaches are adopted (Robson, 2002).

I therefore view this particular study as a starting point for my interest in using self-efficacy/confidence measures as ways of evaluating trade union representatives training courses. It will concentrate on a post-positivist approach with an understanding that there is much to do following it to support and develop the ideas further from an interpretive or critical inquiry mind set. A number of writers agree that “Post-positivism holds only partially objective accounts of the world can be produced, because all methods are flawed” (Blaxter et al., 2002b; Denzin and Lincoln, 2005). I accept the notion, held by post-positivists, that we cannot view the world as disinterested bystanders looking-in on our subjects (Muijs, 2004). In fact in the area of professional doctorates this is probably more difficult than in many other areas. I have to accept that this particular study is personally very important to me and the work I do in my professional life. I want the study to focus on how well we can rely on the findings to predict certain outcomes and probably raise more questions than answers to further develop the issues in the future.

Research is concerned with trying to understand the world and that is often informed by how we, as individual researchers, view the world (Cohen et al., 2000). Clough and Nutbrown (2007) state the purpose of research as being not so much to prove things but more to investigate questions and explore issues. Many researchers either want to understand a situation more clearly or to change things by virtue of their research. In fact some often have both these objectives. In my particular area of work I want to aim for both of these objectives: I want to be able to consider whether or not there are any differences between course participants and I want to be able to use this knowledge to make changes in the future to my professional work, if they are justified. So the pragmatist would suggest a research approach based on the type of question the researcher is asking. If it requires a qualitative type answer then this maybe the approach to take and vice-versa. Methods and data used (qualitative, quantitative or both) should follow from and fit in with, the question(s) being asked (Punch, 2009).

Quantitative research usually involves the collection and analysis of data and is deductive and objectivist incorporating a positivist influenced natural science model of a research process (David and Sutton, 2004). Using a syllogistic approach I have taken a phenomenon observed in other areas of work [confidence and self-efficacy]

and suggested that it can be applied in the area of my work around the training of trade union representatives. This is a deductive approach: as suggested in the literature review many studies suggest that confidence levels can predict behaviour or lack of behaviour. For example if someone reports feeling confident about doing a task then they are more likely to carry out that task than someone who expresses low confidence levels. This study has applied that concept to the area of trade union representatives in order to verify whether or not representatives are more confident after attending one course over another type of course and if they are, whether or not they are then more likely to perform certain tasks. I have generated hypotheses that will be tested through this study which will allow me to explain the laws around these theories: the principle of deductivism (Bryman, 2004). Quantitative research has been more directed at verifying theories (Punch, 2009) whereas qualitative methods often generate new theories. This initial focus on the quantitative will, no doubt, lead to many recommendations for further work of a qualitative nature. The results of this study will not be the end of the story. My interpretation and the inferences made will not be the end of the process.

**The research undertaken is presented as follows:**

**Phase 1: a small scale focus on confidence levels, feedback from a small study and a European perspective in 2005.**

**Phase 2: the development of a questionnaire collecting quantitative data of a much larger number of course attendees during 2006.**

### ***3.3 The Training environment***

It has been demonstrated in the previous chapter that many researchers have illustrated the predictive validity of the theory of planned behaviour (Ajzen and Madden, 1986, Madden et al., 1992, Netemeyer and Burton, 1990). Other researchers demonstrate that the attitudinal and subjective norms variables are sufficient predictors of behavioural intentions and actual behaviour (Fishbein and Stasson, 1990). Most of these are outside of the training context however, in her doctoral thesis, Lanigan tested the theory using a real training environment and her results demonstrated support for the predictive validity of the theory of planned behaviour

variables (Lanigan, 1997). She also suggests that self-efficacy is the strongest predictor of actual behaviour (Lanigan, 2001).

Trainers in the world of trade union representative training have many demands on their time. Evaluation of courses tends to concentrate on lower levels of evaluation and rarely considers the actual evaluation of changed behaviour and any effect this might have on the trade union organisation that they represent. It would be almost impossible to carry out detailed evaluation using all the variables considered above. The participants that attend training courses come from all over the country and the trainer would have very little contact with them once they left the course. It would be almost impossible to actively observe participants in their workplace to highlight any behaviour change due to these circumstances. More recently, with the advent of a new type of union representative, the Union Learning Representative, confidence as a measure to predict action has been considered. Moore and Ross (2008) report that union learning representatives report confidence in their abilities to do things following basic IT course.

In designing the questionnaire and scales reference were made towards a suggested list of principles (Greenfield, 2002: page 174) including:

- ✓ Reliability – a question that a respondent will give the same response to on different occasions. Respondent will read the question consistently.
- ✓ Validity – the question actually measure what we say it does.
- ✓ Discrimination – good measures should be sensitive to measuring real and meaningful differences in a sample.
- ✓ Response rate – non response is minimised by aiming not to repeat or ask irrelevant or insensitive questions.
- ✓ Same meaning – each respondent has the same meaning when interpreting questions.
- ✓ Relevance – each question must be important to the questionnaire.
- ✓ Exhaustiveness and Inclusiveness – enough response alternatives for everyone to be able to respond sufficiently, whilst each being mutually exclusive so only one response will be used.

### ***3.4 Background to the Study***

In the early part of 2005 I commenced work on a small project in the south east of England; one of the nine regions of the organisation in England. This project aimed to consider how we ensured that the volunteer representatives we recruited were more confident following training with a hope that this would lead them to be competent and capable in their role. Up until this time, the evaluation of representatives training courses focused on level one and a slight amount of level two evaluation (Kirkpatrick and Kirkpatrick, 2006); what most trade union trainers would refer to as the 'happy sheets'. I developed a simple confidence scale measurement device which I used at the beginning and end of each course to further develop the evaluation. This was the very start of my thinking, the embryonic idea, which has developed and resulted in this study. During the following year I tried a number of different formats for confidence scales [see appendix:1 for examples]; simple percentage scales and five point Likert scales. Whilst these were not scientific in nature they demonstrated that participants did increase their confidence from attending the training course. Out of 60 participants, 59 recorded an increase in their confidence level from the beginning of the course and the end.

The exercise also enabled me, as the trainer, to focus on any areas that participants expressed a lower level of confidence and consider whether there was some way of boosting this in future courses. Obviously these scores were taken immediately at the end of a training course and the participants may well have felt particularly buoyant about their ability and enthused about the role of the trade union representative. This began me thinking that it might be necessary to consider how people reported their confidence levels sometime after the training course; after they had returned to their workplaces and maybe been called upon to perform in their trade union role. This would be in line with Kirkpatrick's thinking when he suggests that in some circumstances two – three months may be an appropriate timeframe for evaluating the effect of training on behaviour whereas six months might be even more suitable (Kirkpatrick and Kirkpatrick, 2006). Additionally, Henerson et al state that measuring behaviour change of this type may be difficult to achieve within a set time frame (Henerson et al., 1987).

In late 2005 the organisation decided the project should be extended and introduced it into a number of other regions of the organisation across England. At this time the organisation embarked on a small scale evaluation exercise in one of these regions



(Macleod and Daley, 2007). The evaluation aimed to use four stages adapted from the work of Kirkpatrick [see Table 1.1] (Kirkpatrick, 1994).

The researchers had access to 15 participants from three training courses but only four of these contributed to three stages of the research and no one took part in all four stages. The evaluation design was developmental (Ovretveit, 1999) and explored the processes and outcomes of the training programmes being delivered in the northern region, ensuring that all chosen methods of data collection were transparent and fit for purpose. Parlett & Hamilton (1976) consider that this type of evaluation is primarily concerned with description and interpretation and not measurement or prediction (Parlett and Hamilton, 1976). The aim was to be able to look at both quantitative and qualitative evidence. Level one and two would be evaluated from the completed course evaluation forms (happy sheets). It was proposed that level three evaluation would be collected through anecdotal records; capturing participants critical incidents in the form of the “human story”. This method assists in the measurement of attitudes as the participants use this instrument to describe a noteworthy event and to offer their own interpretation of its relevance.

Henerson et al (1987) describes the anecdotal record procedure, a semi-structured way of collecting data, as having an advantage because it can be used when it is not possible to define the behaviours or information you are looking for. Unfortunately none of the participants completed any of these anecdotal record forms. The short interviews were conducted by telephone, several weeks after the training in order that there had been an opportunity for the learning to be put into practice. Open ended questions were asked in order to provide a rigorous descriptive baseline for further programme development (Murphy, 2001) and were then thematically analysed (Morse and Field, 1995). The level one evaluation data indicated that the content of all three of the workshops met participants’ needs and the organisational learning outcomes. Participants stated that the two day format of the programme was good although there appeared to be difficulty in securing release from the workplace to undergo the training. The level one qualitative data which indicated participants’ increased confidence and acquisition of skills was reiterated by those who subsequently took part in the telephone interviews. These comments are highlighted within the discussion part of this study to demonstrate support for the statistical outcomes of this research.

This small-scale piece of research raised more questions than answers for me; in many respects I wanted to contribute to the discussion on how we prepare and support the individuals that are described in the anonymous verse laid out at the beginning of this thesis. How do trade unions ensure their armies of volunteers in workplaces across the country are properly able to give advice and guidance on the many areas of expertise they cover? How do trade unions make sure their representatives are confident, capable and competent to perform their roles? In recent times, the major credit-crunch and the tightening of the spending of organisations, these sorts of questions become more important. Training is often the first area of an organisation that is expected to reduce its spending in difficult times. Trainers in these circumstances will find it even more difficult if they are unable to demonstrate the worth of the training against the objectives of the organisation. No more so is this true in trade unions; representative training needs to demonstrate its effectiveness and impact on the objectives and delivery of service of the union.

In their research Holgate and Simms describe the impact of the TUC Organising Academy by focusing mainly on the views of the graduates from the Academy and not on overall outcomes for the trade unions as a whole; such as increases in membership and local campaigning (Holgate and Simms, 2008). My aim would be to consider how trade union educators should use self-efficacy and confidence measures to demonstrate that training programmes are effective and bring benefit to the organisation as the local trade union representative makes a difference to the working lives of the union's members at the workplace.

At this time I was responsible for the union's (my employer) training of its representatives across England. The organisation spent approximately £600,000 per year on providing the training to its representatives across the United Kingdom through a number of different formats: five-day residential courses; two-day distance learning followed by three-day practical skills workshops (known as mixed-mode); one-day modules spread over a five week period; one-day updating sessions on specific issues; and a mix of the above.

These courses also used a variety of teaching methods and styles such as traditional teaching and lecturing; facilitative learning processes; distance learning workbooks supported by telephone contact with a lecturer and role plays. Most of the learning opportunities were evaluated immediately following the course through a simple

evaluation sheet assessing the participant's levels of satisfaction with the course, teaching methods and materials and the venue used.

The union had decided to introduce different modes of delivery of courses to prepare trade union representatives for their role. When introducing new delivery methods for courses it was important to be able to ensure the quality of the course remained (or improved) and guarantee that outcomes were not diminished. By the time the research for this study was carried out, the three modes of delivery had been developed to deliver the six day 'introduction and Basic Skills of Representation' course. All three modes of delivery had the same aims and objectives and content. They were designed to equip members of the union who volunteered to carry out a role as a union steward, representing the union's members in local workplaces. All three modes of delivery were taught by the same tutors so any 'lecturer' effect as a variable was avoided. The three modes of delivery of the six day course were as follows:

1. **Traditional five-day residential** – participants attend a one-day introductory study day following their election as a union representative. This introduces, at a basic level, them to the role of the union and their specific role as a representative within it. Following this one-day they then attend a five-day residential course which aims to build up their understanding of their role through presentations, taught material, group work, discussions and exercises and role-play of specific scenarios. Handouts and course materials are provided to develop background knowledge. Practical skills are developed through feedback on performance throughout these six days of training. The majority of trade unions follow this model of delivery for their representatives' training courses.
2. **Mixed mode** – participants attend a one-day introductory study day following their election as a union representative. This introduces, at a basic level, them to the role of the union and their specific role as a representative within it. Following this one-day the participants would receive a distance learning work book and reading materials covering all the background and theoretical knowledge covered on the traditional five-day residential course. They would be supported by the tutor through email and telephone contact to work through the reading materials and work book. Following successful completion of the work book participants would attend a three-day residential course aimed at providing the opportunity to develop the practical skills elements of the five-day residential

course.

Overall this equates to a six day course but delivered in a different format. This addresses two distinct drivers from the unions membership that resulted in a different format being developed; firstly the membership gender make-up of the organisation [91% female] suggested a need to provide services that were more family friendly; and secondly, the cost of providing five day residential courses and the need to reduce costs overall. Again this course provided six days of training overall.

3. **2 plus 2 plus 2** –this course delivery method amalgamated the one day introductory day with the five day course and reshaped its delivery, although the overall aims and objectives and content remained the same. This resulted in smaller bite size learning modules. Following election as union representative participants were invited to the first of three sets of two-day courses. This included a one-day course of distance learning written materials in the form of a work book and web based exercises, followed by attendance at a one-day course held in one of the unions regional/local offices. Overtime this format would be repeated twice so that the full course materials, aims and objectives were met through six days of training.

As the unions offices were used instead of residential venues (hotels) this reduced cost considerably in overnight accommodation needs and costs of the learning facilities provided. Many volunteers, who became representatives, had expressed a wish to use new technologies in learning such as computer and internet based and here was a further wish to re-focus the work-life balance. Many representatives were expressing difficulties in taking periods of time away from the workplace and their families to attend union courses.

In introducing new methods of delivery the union needed to be sure that it was not losing anything from the process. The union is duty bound to ensure its representatives are adequately trained to deliver the role that they have volunteered for. As the person in charge of the education process for the representatives I needed to be sure that new courses were still giving us the standard of expertise and knowledge that the traditional method had done for many years. This research has used the work around confidence measures discussed in the methodology to aim to measure the confidence levels of union representatives attending one of the above three described courses. It also relies heavily on the stages of evaluation described by

Kirkpatrick & Kirkpatrick (2006) as this research questionnaire was sent out six months after the participants had attended one of these training courses.

For some time I had felt that there was insufficient time spent in evaluating the provision of training course against any particular outcomes. There was no follow up evaluation of these representatives in the form of verifying outcomes such as actual use of the skills trained or knowledge gained. There was no evidence that trainers were adapting their practice to evaluation they received. I therefore began to formulate ideas that would lend itself to a research proposal that might assist in the development of the service I was involved in delivering; there certainly were sufficient individuals/participants that had taken part in the various modes of delivery of courses. Groups could be compared to see if any one type of the training events provided better equipped representatives for their roles.

### ***3.5 Sample of the study***

It was necessary to ensure sufficient numbers of participants in the study to demonstrate any significant results. The different modes of delivery were introduced over a period of time and as this time passed newly elected union representatives would sign-up for the mode of delivery they felt most appropriate and comfortable with. In the early stages of the study the five-day residential course was available but as time moved on the other two courses were introduced and take-up increased.

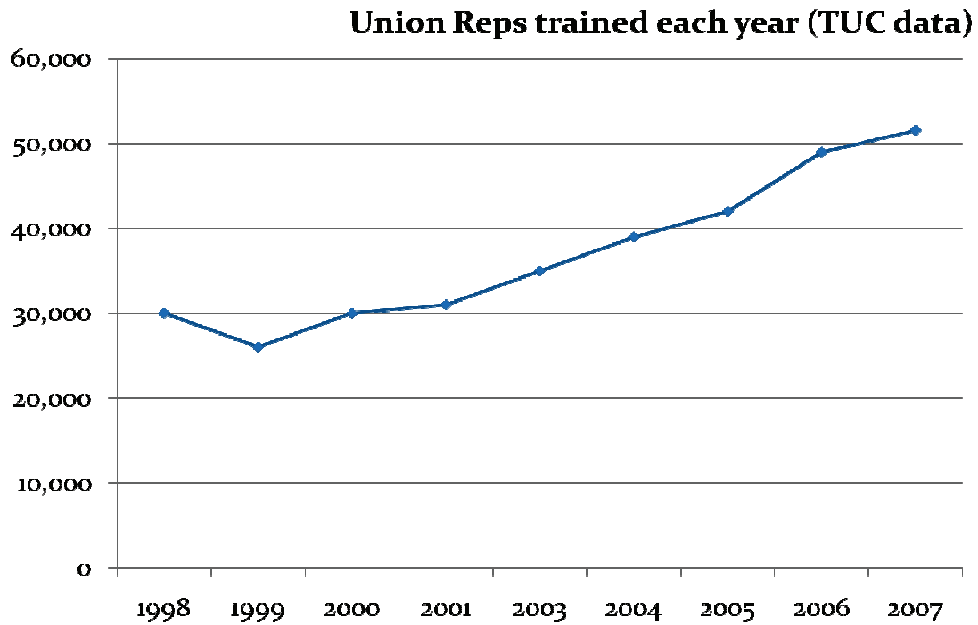
The sample used for the study therefore included all newly elected union representatives in this period of time and the results would be relevant to the whole population of union representatives. Five courses of each mode of delivery were considered. Table 3.1 highlights the numbers of participants on each of the courses throughout the period of the study.

**Table 3.1: sample of the study**

<b>Mode of Delivery</b>	<b>Numbers of participants per course</b>	<b>Number of courses</b>	<b>Total number of participants in sample</b>
Five-day residential course	16/17	5	84
Mixed mode course	25/26	5	128
2 plus 2 plus 2 course	18/19	5	93
<b>Totals</b>		<b>15</b>	<b>305</b>

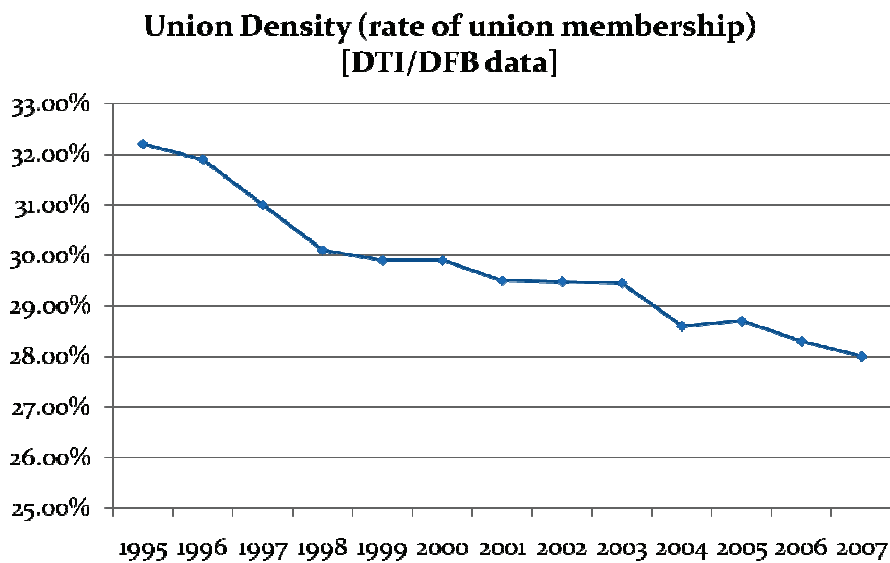
***3.6 Better Organising through better training: Raising confidence with thorough evaluation.***

At first glance one might be forgiven for thinking that trade union representative training was highly successful. Figure 1 demonstrates that in 2007 well over 51,000 union representatives attended a training course and that since 1999 there has been a year on year increase in the number of training places taken up. In fact from 1998 to 2007 the TUC suggest that well over 360,000 union representatives availed themselves of the opportunity to gain from a training course and 81% of participants agreed or strongly agreed that they had enjoyed their learning experience (T.U.C., 2008). With this type of success one could expect some really robust, dynamic, well organised trade unions delivering effective campaigns and negotiations at a local workplace level; with ever increasing memberships.



**Figure 1: Number of union representatives training courses (TUC data)**

It is worth comparing the apparent good news for trade unions shown in figure 1 with some other facts; the TUC claims 7 million members across 58 affiliated trade unions, whereas the Department for Business, Enterprise & Regulatory Reform [BERR, formerly DTI/DFB] suggest that union membership has been dropping since 1995 (B.E.R.R, 2008). During 1995 to 2007 the rate of union membership fell by 4% resulting in only 28% of the workforce being in membership of a trade union **[Fig.2]**.



**Figure 2: Union Density**

It might be assumed from these two diagrams that the more training that is provided for trade union representatives the less we seem to be recruiting people into the trade union movement; we may have a more educated union representative dealing with fewer and fewer numbers of members.

It is my belief that trade unions have not concentrated sufficiently on evaluating the training provided with enough thoroughness. We have not developed robust methods of evaluation so that we can measure impact, building effectively on delivery of positive outcomes when representatives are back in the workplace. We are therefore missing the opportunity to develop the full potential from the training provided. In order to identify this position I have discussed and communicated with trade union colleagues across the United Kingdom and within the TUC. I also organised a visit to Sweden and Germany to consider the European dimension. These two countries were recommended as the most likely to have developed any trade union evaluation methods.

### ***3.7 The Swedish Perspective***

Current unionisation rates in Sweden are considerably high around the level of 80%. A large majority of privately employed professionals belong to a union. Sweden legislates to give trade unions the right to have collective agreements with employers. These agreements are very significant and provide a powerful tool for the Swedish unions and the structure of union organisation is aimed at ensuring that these collective agreements are adhered to, to deliver to negotiated employment agreements and direct representation in the workplace.

There are three central confederation organisations of unions in the Swedish labour market; the *Swedish Trade Union Confederation* (LO – “Blue-collar” workers), the *Swedish Confederation of Professional Employees* (TCO – “White-collar” workers) and the *Swedish Confederation of Professional Associations* (SACO – academic professionals). Both TCO and LO have common interests in connected labour relations issues and close co-operation is evident between both of these organisations. I therefore visited both the education departments of these confederations.



I met with **Bjorn Arnoldhsson** (LO Department of Education and Organisation) on a number of occasions. LO has 16 union affiliates (500 regional branches) covering approximately 1.8 million members (Sweden has population of approximately 8.5 million). LO is responsible for co-ordinating wage bargaining, international labour activities, trade union education, children's and young people's education, campaigns for gender equality and social security, labour research and mobilising public opinion. LO has close links with the Swedish Social Democrat Party. 10% of the organisation's membership are elected representatives and 80% of the members can specifically name their local union representative.

The current challenges facing LO include new management strategies (Unatrist) which are counter to established traditional pluralist collective arrangements/principles grounded in workplace custom and practice, social policy and significant legislation; reductions in workforce numbers; falls in trade union training; making trade union membership attractive, acceptable and pertinent to the younger workforce; changing negotiation conditions less favourable to labour akin to the Thatcherism doctrine; recruiting new members to retain a substantial political voice and aiming to get increased organisational efficiency and effectiveness as a result of relative diminishing capital. Therefore, the cumulative effects of these factors are obviously affecting the implementation of their training strategy and hence curriculum delivery to workplace representatives in an economically challenging environment. The individual affiliates are responsible for basic training for their members and representatives and LO provides more advanced training for representatives and union officers via the national system of Swedish Folk-High Schools.

Similar trends to many British trade unions' training strategies were evident in respect to course delivery. LO is considering the use of learning supported at a distance and moving away from long residential courses to long learning processes incorporating learning as an integrated aspect of all trade union activities with an increased use of state of the art IT tools/methods/systems. The advanced training provided by LO covers a two-week course on trade union ideology and values, 40 other courses on different subjects lasting from 3 days to 7 weeks, university courses and ETUC organisation courses on different subjects.

The evaluation of trade union training courses is rudimentary but the importance of the quality assurance perspective was never-the-less evident. However, LO is

currently devising learning outcomes for all its courses covered by their curriculum in order to provide parameters of success indicators for evaluation in the future. LO has recently developed an electronic database evaluation method which will be used in future for evaluation and to provide feedback for the affiliate unions. This database system was demonstrated to me during my visit. It was apparent that the recorded data presented from this system were mainly recordings of participants' subjective reactions to their learning experience and their reported perceptions of topics they had learned on their courses. I therefore concluded from this initial examination, that it appeared from the evidence presented at this demonstration that Kirkpatrick's first two evaluation levels were only in operation in this system (Kirkpatrick, 1994). However, I felt that more in-depth detailed analysis would be necessary to explore this more fully; more valid and reliable research methods incorporated into data collection (both qualitative and quantitative) prior to reporting credible findings, making robust recommendations and making any firm conclusions regarding this methodology.

LO had organised an evaluation workshop at which evaluation techniques and methods were considered. Participants were expected to work on and present their own evaluation project. An officer from the education department of LO attended and carried out an evaluation of the training programmes for those intending to become trade union officers. This evaluation mainly relied on those data of a qualitative nature. It had collecting detailed responses from 79 participants attending courses from 1998 to 2005. Within the results of this work there were however some evidence of transfer of knowledge (Kirkpatrick, 1994). This was especially evident in respect of the topics taught on the programmes being transferred into the workplace by representatives. Evidence suggested that the future working arrangements of the individuals were affected in a positive manner with respect to their trade union role. A more sophisticated method however, would be necessary to demonstrate statistical accuracy of this evaluation system which would complement the mainly qualitative methodology used previously. For firmer conclusions to be made about the effectiveness of the training delivered in this workshop and its impact on practices in the workplace in measuring the participants' increased skills in representing members, further research would be required.

I also visited two of the three LO Folk High Schools where their education is provided: Runo and Brunnsvik. These sites had a very high standard of learning

facilities for participants in terms of outstanding facilities (accommodation and equipment) designed to create an exceptional learning environment. Brunnsvik is the labour movement's oldest residential college for adult education, established in 1906 by a local farmer on the banks of Lake Vasman, approximately 250 kilometres north west of Stockholm. The courses covered topics including negotiation skills, workplace environmental consideration, health and safety at work, equality, economic studies, workplace trade union organisation, democracy, ideological debate and culture, leadership, organisational development and change, management and the work of the board in a democratic organisation, politics and society, and international and European studies.

I discussed evaluation of trade union courses with the teaching staff and some participants of courses. In Sweden, they currently tend to concentrate on methods identified as level one and two evaluation (Kirkpatrick, 2006). They could see the relevance of advancing this into levels three and four in order to demonstrate the effectiveness of the courses they provide but no work had been carried out to implement this level of evaluation. I also attended and contributed to a discussion on a course for union representatives on sex and gender equality and discrimination concentrating on the similarities and differences of UK and Sweden legislation and processes. The learners reported back that this was a valuable learning experience.

I met with **Ken Bjerregaard**, Education Officer at the TCO. This confederation has 17 affiliate trade unions covering approximately 1.25 million members who are well-educated and professional employees working in most sectors of the economy; most have university degrees. The TCO is party politically independent (TCO, 2007). Members include nurses, police, journalists, engineers and civil servants to name but a few. The unions affiliated to the TCO tend to provide the members training programme and the basic and higher representatives training programme. The TCO union academy, which will become operational in 2008, will concentrate on providing courses that are of a high level and mainly delivered in partnership with identified universities.

Again, an understanding of the Swedish culture and union structures is important in understanding the very nature of the training provided. Sweden has a system of nine study organisations for the people across the country. TCO has incorporated methods used by these study groups, such as study circles, as a way of delivering union training at a local level through union clubs. Swedish people have a tendency to

celebrate and involve themselves in community approaches so this deliver method was reported to work well. Unions also provide basic level training for their members on the collective agreements, health and safety, legislation and their rights at work and information about the union. This is provided in order to raise the understanding of the union movement across all the membership and also aims to initiate further interest in members to augment recruitment of further union representatives.

Any workplace within Sweden that has over 1000 workers gives the union the right to organise union representatives working full time on union work funded for by the employer. It was reported that generally businesses in Sweden see this as a positive business concept; partnership working with the union ensures a happy workforce therefore a good or increased productivity although this concept was being challenged by the current political party in power at the time of my visit. Representatives in this situation are classed as a higher or advanced representative; the unions invest in their education and development to provide them with training in management and leadership to participate on company boards, training in providing career advice for members and mentorship of lower level representatives. Obviously with the rights described previously comes the responsibility to ensure that the 10-15% of union members that become representatives are highly trained to equip them with the necessary skills, knowledge and confidence to perform in the role effectively for the membership. TCO suggest that 10% of their membership go through union education each year.

### ***3.8 The German Perspective***

In Germany, most unions affiliate to the German equivalent of the TUC, the *DGB*. Within the workplace a dual system of union representatives and workplace council representatives (staff of a company elected by the entire workforce for a period of four years) operates. Legislation provides for employers to fund and pay for any training required by workplace council representatives. This training can be provided by the individual trade unions, who also train their own representatives, private training companies or the training arm of the *DGB*, the *DGB Bildungswerk*. During my time in Germany I visited the *DGB Bildungswerk* and two trade unions; *IG Metall* and *IG BCE*.

**Jurgen Hoffmann** of the *DGB Bildungswerk* outlined the aims of the organisation; to provide training opportunities for five topic areas;

- Migration issues;
- Political Education issues - open to any member of the public;
- Youth issues – open to all members of the public but also has a work stream concentrating on worker representatives council members;
- Training specifically for Workers Representative Councils including legislation affecting workers, health and Safety issues, the environment and communication within workers representatives councils;
- Schools – similar to those in Sweden the *DGM* has three schools offering courses across Germany. These traditionally provide the longer residential training courses but are starting to introduce other modes of delivery. There is also a non-residential day school operating from Düsseldorf.

The *DGB Bildungswerk* validated its impressive programme of courses through the International Standards Organisation and is also considering the implications of the European Credit Point System for Vocational Education and Training. They vocalised a need for the trade union movement across Europe to work much more closely together on the issues of training of representatives in the future. They were keen to consider the work of this study on evaluation of representatives training courses as they currently seemed to be focused on level one evaluation (Kirkpatrick, 1994).

The *IG BCE* union is the third largest trade union in Germany with approximately 730,000 members covering workers in the chemical, rubber, and paper and energy industries. I met with **Ines Kimmelmeier**, based in the personnel department, who outlined the training opportunities offered to the volunteer representatives and the professional staff of the organisation. This union provided an impressive programme of training courses including;

- Introductory training for representatives;

- Legislation; lone workers, temporary workers, economic and social law, tax, welfare, restructuring of enterprises, employment and anti-discrimination laws;
- Basic and specialisation courses in Economics;
- Communication and organising within the union including negotiation and strategies, conflict management, managing within organisations and media/public relations;
- The global environment health and safety in that of work;
- Data, computers and languages;
- Special topics including pay negotiations, performance related pay, working time and shifts and protection of data;
- Special union functions including training for Chairs and Vice Chairs, representatives for disabled workers, economic representatives, members on company boards and those carrying out special projects;
- Courses specifically for staff included; office management, stress management, computer courses, English language, recent changes in legislation, Economy, communication and psychology, working time, media and PR, teambuilding, committee skills and conflict and leadership;

A similar trend became apparent in respect to all the officials met during this visit in Germany and Sweden. On reviewing the evaluation methods used for courses provided it seemed that evaluation was occurring only at level one (Kirkpatrick, 1994). The evaluation methods utilised seemed to concentrate on the participants completing forms referred to as “happy sheets”. These recorded the subjective views of participants immediately following attendance on a course. Evidence was not collected in respect of Kirkpatrick’s further 3 levels so no conclusions could be made whether the programmes delivered the areas included in his model to comprehensively evaluate training. These voids obviously provide the need for further enquiry into making the evaluative methods more sophisticated.

*IG Metall* currently has 1.2 million members with a mix of both “blue and white collar” workers from the automobile, machine, engineering and IT industries. Some

of these industries have a top level collective approach to pay bargaining. It was reported that they have good levels of organising within the “blue collar” worker sector but it was reported to be more difficult to do this within “white collar” work areas. They have particularly found it difficult to organise in the former Eastern German areas which was reported to be as a result of cultural differences and the influence of the former Soviet system on attitudes and beliefs. The union currently loses about 1.5% of its membership each year as “blue collar” workers decline in numbers in Germany with the reverse trend in “white collar” workers which are increasing. It was reported that these trends were attributed to the changes apparent in manufacturing and industry across the country.

I became aware that the cost of re-unification of Germany had cost their economy a great deal. Concerns were voiced that the West skill held dominance in its social and employment prospects and the East was losing out and were also given as reasons for poorer union density in this region.

The union has seven training schools across Germany with 50 full time trainers providing 1-2 week training courses to deliver the curriculum. They also provide more local training at hotel venues nearer to members’ workplaces. Overall, the union has about 100,000 members undertaking some form of training each year.

I met with **Dr Lothar Wentzel**, a sociologist working for *IG Metall*, who outlined his research findings from a project that had been conducted approximately ten years ago. The methodology adopted for his research followed an ethnographic approach. There were two researchers involved in observing and recording classroom sessions to consider the effects of training. They observed 14 full courses and reported on issues such as how to improve the teaching methods and what are the effects of the training delivered. Six months following the training courses individuals were interviewed using a narrative approach to encourage the participants to share their experiences and feelings. Unfortunately, this large report is only available in German.

However, Dr Wentzel outlined some of the issues and difficulties in studying the effects of training that the study had demonstrated:

- So many things outside of the actual training can have an effect on the outcome of the training, e.g., external issues and forces back in workplaces may affect the training received either positively and/or negatively;

- In the seminars many participants recorded the interest and energy of the tutor having an effect on their learning;
- Participants remember very little of the course content six months later. They are more likely to report on things that energize them; the climate and environment of the classroom, the influence of the behaviour of the trainer, other participants experiences and consideration of the problems of values and behaviours such as conflict versus partnership;
- Feeling more supported and more able to deal with doubts they may have had over the future of trade unions;
- Participants report that their inner disposition is affected by the training which has an effect on their behaviour in the workplace;
- Lead representatives were asked what was important in their preparation process to get them to the lead representative position. They suggested that when they first commenced their union representative life, it was important to see the world from different eyes. Later in the representatives' career the historical context of labour and unions and political orientation became more important.

### ***3.9 Conclusions from the European visits***

I feel that these study trips were extremely useful in helping me in the process of developing this research study. In particular the following conclusions were drawn following the visits;

- Confirmation that, with the exception of IG Metall's research, there is little progress from Kirkpatrick's level one and two evaluation levels. This would support my development of this research project in this area. Moreover, there is great scope for both international and national projects in this area and comparative studies would also be of great benefit in demonstrating social and political similarities/differences across Europe as the Community expands. Dialogue from my tour indicated to me that unions want the movement to organise itself across Europe and an understanding of its differing political and social systems is essential if this is to occur;



- A mixed method approach (Tashakkori and Teddlie, 1998, Tashakkori and Teddlie, 2003) to the research proposal may be sensible as both qualitative and quantitatively methods will generate data which will complement each other;
- The effects of trade union representative education may well be different at different times in the individuals' trade union career/role. A biographical research approach may be useful in ascertaining a better understanding of this subject at different times.
- The TUC needs to organise with its associates across the EU in order to ensure effective trade union functioning for the benefit of the Community's workers. Representative education is paramount to achieve these goals.

**The findings arising from phase 1 resulted in the realisation that a more appropriate evaluation tool was needed to measure impact of training on the workplace. Phase 2 describes the creation and evaluation of the tool: Self-Efficacy and Improvement Measure.**

### ***3.10 Instrumentation and data gathering***

The need to develop simple self-efficacy confidence rating instruments that would act as a predictable variable of the effect of training on the actual behaviour of participants on courses became evident as a result of phase 1(European visits) research undertaken. These would have to be self reported by the participants and it is recognised that this can cause difficulties with the validity of the data (Saks, 1995). The intention being that these instruments could be used in future courses to demonstrate the effect of the training on the behaviour likely to be demonstrated by participants when they returned to their workplaces and carried out their representative role.

A training environment in a large professional trade union across England was used to collect data for this study. The trade union's members were all from one professional background. A whole programme of preparation for the role of the trade union representative was offered. This included representation, collective bargaining and negotiation and organising offered through a series of courses.

Traditionally these courses were provided in week long residential courses, external from the representatives' workplaces and the trade union. Over time there were a number of pressures to develop other alternative delivery methods for these courses. At the time of the research commencing the trade union was delivering courses in the traditional week long residential format alongside a reduced residential (three days) with two day distance learning workbooks format; a two day residential with distance learning materials supporting; and also a one day modular course spread across five weeks.

With this increased number of delivery options concerns were expressed over the effectiveness of the participants when returning to their respective workplaces. The trade union had no way of demonstrating the effectiveness of participants on the traditional course or the newer versions. There was also some reluctance expressed amongst the training staff that provided these courses across the country. The introduction of new modes of delivery had inevitably made some tutors feel vulnerable; they felt that the traditional delivery method was satisfactory and there was no evidence to suggest that it needed to be changed. This research study was intended to measure the effectiveness of the three courses and possibly compare their effectiveness whilst also producing a simple self-efficacy confidence scale instrument for this use in trade union representative training in the future.

This study concentrated on one part of the whole training programme; the initial introductory course around representation skills. Three types of delivering this course were considered for evaluation; five-day residential (known as the 5-day residential model), two-day distance learning plus three-day residential (known as the mixed mode model) and a two-day Introduction plus two day representation skills courses including distance learning materials as support (known as the 2 plus 2 plus 2 model).

In order to measure actual behaviour of the participants following the course a 12 point behavioural instrument was developed which collected information on the following activities that were covered as learning objectives of the introductory and representation skills courses; recruitment talk to a group, recruitment of individuals, observing a disciplinary hearing, formal representation of a union member at a disciplinary hearing, formal representation of a union member at a grievance hearing, informal representation of a union member in meetings with management, giving advice to union members, discussing their union role with their management,

attending negotiations on behalf of union members, attending their own support and mentoring sessions, discussing cases as a learning exercise and writing a statement of a case for a union member. Participants were asked if they have been active in their role and whether or not they received sufficient support from the trade union employees that are in post to provide this service.

Two self-efficacy/confidence instruments were developed to measure confidence in particular tasks that had been covered as learning objectives of the relevant courses. Both instruments used the same five point response Likert scale [Table 3.2]:

**Table 3.2: Confidence level Likert Scale**

1	Not Confident – cannot do this task at all (1)
2	Low level of confidence – not entirely sure I can do this task (2)
3	Moderately certain I can do this task (3)
4	Fairly confident I can do this task (4)
5	Highly certain and confident I can do this task (5)

The first of these instruments considered ten skills covered by learning objectives of the relevant courses and aspects that could be compared with the answers in the behavioural instrument described above. Participants were asked to describe how confident they were in:

1. Doing a recruitment presentation to a group of new student nurses.
2. Approaching an individual nurse and talking about the benefits of membership of the union.
3. Accessing relevant recruitment materials from the Union.
4. Using a union PowerPoint presentation for recruitment.

5. Persuading a member of another union to consider switching and joining the union.
6. Describe the key elements of the Union Steward's role.
7. Talking to colleagues about the benefits of becoming a union representative.
8. Developing a recruitment strategy within their workplace.
9. Advising members on diversity and equal opportunity issues.

The second self-efficacy instrument considered 14 skills needed to deal with a case scenario of Judy the registered nurse who made a drugs error:

*“Judy returned from Annual leave on a late shift. She took handover and was the registered nurse in charge of a 25 bedded medical ward. She carried out the drugs round at 2 pm and failed to realise that there were two patients with similar names. Consequently she gave each of these patients the wrong drugs. Once realising her mistake, 30 minutes later, she reported the matter to the doctor and the senior nurse. Both patients were informed of the mistake and neither of them suffered any ill effects”.*

To ensure the validity of this instrument (that it was measuring what it was expected to measure) the scenario was agreed with a group of expert representatives as a case description that they would expect a newly trained representative to manage. Three case scenarios were developed with differing degrees of difficulty; straight forward, moderate, complex. The experts were given definitions of the categories and criteria to apply when judging the three scenarios [Appendix 4]. The expert panel of representatives was made up of regional representatives on a national committee who had been representatives sometime and had, as a minimum, five years experience each. In ranking the scenarios for difficulty they agreed that the case study used in this research questionnaire was classified as a reasonably simple level case that a newly trained representative should feel capable of dealing with if given the required training.

To further support the content validity of the instrument, all items were examined and matched to the learning objectives of the training courses. Thus, the 14 items that appeared in the instrument were the equivalent to 14 learning outcomes expected from the training course.

Usability tests were completed on the instruments to make sure the items were defined similarly and the vocabulary level was appropriate and understandable. These tests were given to ten members of the union's staff with involvement with the union representatives and their training. They were asked to read out the instruments out loud and explain to the researcher what each item meant. There was widespread understanding and agreement.

The participants were asked to rank their confidence level using the five point Likert scale described above against the following statements:

1. Interview Judy in order to complete a statement of case for her.
2. Complete/write/document a chronological statement of events relating to Judy's case.
3. Prepare your presentation for a disciplinary hearing, representing Judy regarding the above scenario.
4. Prepare questions for Judy that you will ask during the disciplinary hearing.
5. Prepare questions to ask management at the disciplinary hearing.
6. Presenting Judy's case during the disciplinary hearing.
7. Questioning and cross questioning Judy, management and the witnesses during the disciplinary hearing.
8. Summing up Judy's case during the disciplinary hearing.
9. Making notes during the disciplinary hearing.
10. Supporting Judy with the decision at the disciplinary hearing.
11. Referring to the procedure to ensure a fair disciplinary hearing.
12. Referring to relevant employment law during the employment hearing.
13. Referring to relevant evidence during the disciplinary.
14. Advising Judy on her options following the disciplinary hearing.

All data was collected from training participants via self report through a questionnaire sent six months after attendance on the relevant training course. A Self-efficacy/confidence instrument for a number of the skills objectives covered on the courses was used alongside a self-efficacy/confidence measure for the individual components of a representation scenario to predict behavioural intentions. Actual reported behaviours were also recorded. The covering letter and questionnaire are attached as appendix two and appendix three.

435 participants were sent questionnaires; 310 (71%) returned their feedback, of which 84 (27%) attended the 5 day residential model, 128 (41%) attended the mixed mode model and 93 (30%) attended the 2 plus 2 plus 2 model.

**The research carried out in this second phase aims to test out the null Hypothesis ( $H_0$ ), using chi-square analysis, on the following statement:**

**There is no relationship between the modes of training course delivery and whether or not the participant is more confident in their role as a trade union representative. The alternative hypothesis being that there is a relationship between the modes of the training course delivery and whether or not the participant is more confident in their role as a trade union representative.**

The Chi-square test was used to determine whether there is a significant difference between the expected frequencies and the observed frequencies. This test is used to determine whether an association or relationship between variables in a sample is likely to reflect a real association between these variables in the population. The Chi-square test is one of the most widely used tests in social statistics which can be used with attributes that have more than two categories (Rowntree, 2004) and is used to compare the frequency with which we would expect observations to occur if chance were operating with the frequency that actually occurred.

The proposed study was submitted to the University of Greenwich Research ethics Committee and was approved in February 2009.

### ***3.11 Procedures***

During the research period the researcher sent out questionnaires to participants on 20 basic first level union representatives training courses. 435 questionnaires were sent out at the point of six months timescale post the attended course. Over the course of six months the data was returned and entered into the SPSS computer software programme. The researcher ensured that each questionnaire was sent out with relevant information informing the participants on the reasons for the research (see appendix 2 and 3). The researcher sent out one extra request for questionnaires to be returned to non-returnees one month after the original questionnaire was sent. This resulted in a 71% return rate.

The data were statistically analysed and the results are presented within the next chapter.

### ***3.12 Summary***

In this chapter I have described the methodology used in the study to collect the data that will be reported and analysed in the following chapters. Initially, it was the intention to consider a mixed-mode research method. However, due to personal circumstances, this specific study has concentrated on a quantitative approach with a small amount of qualitative data from another small scale study already carried out. I have suggested recommendations for further research in this area in the conclusions and recommendations chapter; these include qualitative methods that may assist in supporting and adding to the results of this particular study.

## **4. FINDINGS, ANALYSIS AND DISCUSSION**

### ***4.1 Introduction***

In the previous chapters the reasons for the study were discussed. This included a description of the supporting literature that describes the context of the methods used to collect the data for the study. In this chapter the results will be introduced with reference to the data in Tables A5.1 – A5.43 outlined in appendix five. This includes the descriptive details of the tool and data set; the statistical results around the tasks participants had become involved in since attending a training course; and finally the statistical results of the confidence scale measurements around the role of the trade union representative. This chapter will also include the analysis of the statistical data and discuss its relevance in relation to the five key research questions:

1. Do the confidence levels of trade union representatives differ depending on the type and delivery method of the course that they attend?
2. Will the mode of training impact on the post-course behaviour of participants?
3. Can the confidence levels of trade union representatives, as course participants, predict the transfer of the knowledge and skills learned on a course into the local workplace to demonstrate their effectiveness to deliver in their trade union role?
4. Are those representatives with higher confidence levels more likely to carry out the specific activity they express confidence over than those with low levels of confidence?
5. Can confidence levels in trade union training act as a marker for the transfer of skills from training to practical local use?

During the course of this analysis and discussion I expect to make recommendation and reach some conclusions and these will be brought together in the following section of this thesis.



## ***4.2 Background***

The union had decided to introduce different modes of delivery of courses to prepare trade union representatives for their role. When introducing new delivery methods for courses it was important to be able to ensure the quality of the course remained (or improved) and guarantee that outcomes were not diminished. By the time the research for this study was carried out two new types of course had been developed; all three courses had the same aims and objectives and were designed to equip members of the union who volunteered to carry out a role as a union steward, representing the union's members in local workplaces. It is worth reminding ourselves of the three courses and their mode of delivery: firstly, the commonly used traditional five-day residential course following a one-day introduction to the role of the union. This format of course will feel familiar to many in the trade union movement; secondly, the mixed mode course, blending distance learning with a shorter three-day residential element, and finally; the 2 plus 2 plus 2 course, a further mixing and blending incorporating new technologies through the use of on-line modules to give the smaller 2-day length inputs as described in the title of the course.

The union needed to ensure that changing courses in this way did not result in its representatives being less able to perform their role. This would result in members of the union being dissatisfied with the union's service to them and could ultimately lead people to decide to cancel their membership.

In some respects this might be better measured by research focused on the end user, e.g. the union member receiving a service from the local representative; or the full time employee of the union monitoring the work of the local union representatives. In this instance this was not possible at the current time, due to time constraints, and as the person in charge of the education process for the representatives I needed to be sure that new courses were still giving us the standard of expertise and knowledge that the traditional method had done for many years.

This research, therefore, has used the work around confidence measures discussed in the literature review to aim to measure the confidence levels of union representatives attending one of the above three described courses. It also relies heavily on the stages of evaluation described by Kirkpatrick (1994) as this research questionnaire was sent out six months after the participant had attended one of these training courses.

In total 310 participants returned a completed questionnaire. Five participants had attended a fourth type of course delivered; one day each week spread over five consecutive weeks in a local office. The course materials were delivered as per the five day residential course but spread over a longer period of time. Due to the small number of returns for this type of course it was removed from the analysis as the numbers were not large enough to demonstrate any significance. Therefore 305 completed questionnaires were entered into the SPSS database package for statistical analysis.

A code book was developed and a thorough checking of the variables took place before analysis of the data. In social science research it is common that the attributes we want to measure are not normally distributed; therefore, we may choose to use a non-parametric statistic that has less stringent assumptions (Kinnear and Gray, 2006, Pallant, 2007). It is useful to distinguish between two types of variable, qualitative (categorical) and quantitative (Armitage et al., 2002). Categorical are those not characterised by a numerical quantity but possible values consist of a number of categories which an individual recorded as belonging to just one of these categories.

#### ***4.3 Gender of participants***

The union's membership by gender is approximately 91% female and 9% male as it represents workers in a female dominated career (nursing). However, the gender of those who volunteer for the role of a union representative (steward in particular) is often seen as more attractive to men. Therefore the gender spread of one man for every three women would not be seen as out of the ordinary on these courses [Table 4.1]. If we examine the spread of the gender of participants according to course attended we can see that the five day residential course was attended by 16.67% men and 83.33% women; the mixed mode course, 28.12% men and 71.88% women and the 2+2+2 course 23.65% men and 76.35% women.

**Table 4.1: Gender of participants (n=305)**

	Frequency	Percent
Male	72	23.6
Female	233	76.4
Total	305	100.0

#### ***4.4 Age of participants***

The age spread of the participants [Table A5.3] reflects the age spread of the union concerned. The union represents a professional group of personnel and it would be likely that from the ages of 18 to 25 years the membership is likely to be studying their profession and are less likely to become involved in trade union activity whilst ensuring they gain the qualifications needed to practice. During this time they would also be at university and not within an employer organisation and therefore unable to be ratified as a trade union representative for a workplace. There is a normal spread across the age ranges 26 to 55 years which is where we would expect the membership to be. Again lower numbers in the older age range (56 years plus) would mirror the makeup of the nursing workforce as the physical demands of the profession mean most nurses are considering retirement during this period of time.

#### ***4.5 Ethnic Background of sample***

Unions are keen to ensure that they represent the different ethnic backgrounds of their membership effectively. Unfortunately the data collected by the union at the time of the research was not complete as it collected data from members giving a wide number of ethnic origins to consider but over 25% of members failed to complete the data. It is estimated that the union's membership is approximately 80% white and the research sample recorded 79%. It is approximated that all categories of black ethnic origin within the union membership make up around 6% of the

membership and the research sample recorded 6.9% in these groupings. Table A5.4 outlines the ethnic background of the participants of this study.

The data reflecting the ages of the participants and their ethnic origin show nothing remarkable. The spread of ages reflects the membership of the organisation. The ethnic background of the sample reflects the ethnic background of the membership of the organisation. The research data also contains adequate numbers of participants from each of the three types of courses concerned.

#### ***4.6 Attendance on the three different types of courses***

As this research is mainly about three different delivery methods of one type of trade union representative course we needed to ensure we had adequate significant numbers of participants attending each of the three courses. At the time that the research questionnaires were sent out to participants there had been a shift in delivery over a number of years. The traditional five day residential courses were still being offered but in smaller numbers and the mixed mode method was taking over the shortfall of course places. Latterly the even newer 2+2+2 course had come on-stream and take-up was increasing. Therefore a larger number of participants attended the mixed mode method with the five day residential reducing and the newer course starting to increase as people became confident about expectations and understanding of what was on offer. 305 questionnaires were returned which would provide sufficient data to suggest some statistical significance in some of the matters concerned.

#### ***4.7 Participants recorded activities since attending a training course***

The first part of the research questionnaire (questions 1-14) considered the type of course participants had attended and their activity as a trade union representative since attending. Participants were asked if they had been active as a union steward (representative) since attending the course six months earlier and their responses are shown in Table 4.2.

**Table 4.2: Active as a representative since attending the training (n=305)**

Mode	Yes	No
5 day residential	36 (42.9%)	48 (57.1%)
Mixed mode 2/3	110 (85.9%)	18 (14.1%)
2 + 2 + 2	90 (96.8%)	3 (3.2%)

The Chi-square test yielded  $\chi^2= 82.529$ ,  $df=2$  and  $p\approx 0.000$ . The value of  $p < .5$  demonstrated that there was a statistically significant difference between the mode of training and whether or not the participants had been active as a representative since attending the course. **Participants from the five day residential course and the mixed mode 2/3 course were less likely than participants from the 2 + 2 + 2 course to have been active. There seems to be a firm suggestion that the 2 + 2 + 2 course has an important outcome not shared by the other two courses.**

In relation to the research questions “Do the confidence levels of trade union representatives differ depending on the type and delivery method of the course that they attend?” and “Will the mode of training impact on the post-course behaviour of participants?”, the data demonstrated the superiority of the 2 + 2 + 2 course over the mixed mode 2/3 course and likewise the mixed mode 2/3 course over the five day residential course in relation to the likelihood that course participants would be active as a union representative within a reasonable time after course participation. The importance of this finding lies in the fact that those attending the mixed mode 2/3 course are doubly likely to be active than those on the five day residential and those attending the 2 + 2 + 2 are even more likely to be active.

This has two important factors for my professional work: firstly, the data suggests that the 2 + 2 + 2 course produces a higher percentage of representatives that have been actively engaged as a representative since attending the course. If one was judging the success of the course to turn out active representatives then the wastage rate in the 2 + 2 + 2 course is only 3% whereas it is 57% for the five day residential course. Secondly, in the economically difficult times that we are in, when organisations have to consider their budgets carefully it can be argued that the 2 + 2

+ 2 course is better value for money as it has better results and is cheaper to deliver than five days resident in a hotel.

There are a number of comments from participants who were involved in the study by Macleod and Daley (2007) that support the effect of the 2 + 2 + 2 on their activity levels as a representative:

*'An excellent two days with small informal group. I feel motivated to get out there into my work area and promote the RCN.'*

*"I am thoroughly looking forward to attending the workplace: Enabling me to 'make a difference'. I'm full of ideas!!!"*

*"I am feeling a bit more assertive and feel now that I've got the knowledge to do things."*

*'The 2 days were well structured and I feel I have gained knowledge and now feel that I have more confidence to volunteer to take part in other meetings. I am looking forward to applying new knowledge in practice'*

The overall aim of the training courses is to prepare the representatives to be active in their role in their workplace. The wastage/failure rate [percentage of participants not performing activities six months post course] of the 2+2+2 was considerably less than that of the five-day residential course; whereas under half of those attending the five-day residential course expressed activity following the course, a high 96.8% expressed activity following the 2+2+2 course. To a lesser extent the mixed mode course participants also recorded a higher percentage (85.9%) of being active following the course.

These data suggests the mode of the delivery has a relationship with the positive reporting of activity. The traditional five-day residential course aims to impart the knowledge and skills during attendance whereas the mixed mode and 2+2+2 courses are designed so that participants are responsible for much of the learning of knowledge before they attend the taught element of the course. Participants attend the group-taught element of these two courses following completion of workbooks, reading materials, on-line research and exercises and telephone/email feedback on progress from tutors. They bring this prior knowledge to the shorter group sessions to develop the skills elements of the course. On the five-day residential course participants are taught the background theory and knowledge in addition to the skills-development in group work sessions.

It would seem that this prior learning assists in the confidence building process of participants. They have the opportunity of building their knowledge over time rather than in one (longer) burst in a classroom setting and thus perceive a 'positive capability for task performance' (Stevens and Gist, 1997).

Noe (2005) suggests that one way of increasing self efficacy is to inform participants they control the learning and they have the ability and responsibility to overcome any learning difficulties they experience. The participants on the 2+2+2 and mixed mode courses have much more control over their individual learning. Those attending the five-day residential course have much less control as they are expected to sit through directly taught sessions within an extremely structured programme to ensure that all content of the course is covered within the residential setting.

The analysis of the training course for RCN union representatives identifies twelve points of learning that participants should be able to carry out following their attendance:

1. Deliver a recruitment talk to a group of prospective members.
2. Recruit individuals to become members of the union.
3. Observe a disciplinary or grievance meeting.
4. Formally represent a member of the union at a disciplinary meeting.
5. Formally represent a member of the union at a grievance meeting.
6. Informally represent a member of the union in a meeting with their management.
7. Give advice to members of the union.
8. Discuss their union role with their manager.
9. Attend negotiation meetings on behalf of union members.
10. Attend their own mentoring and support sessions.
11. Discuss cases they are handling to assist their own learning.
12. Write a statement of case on behalf of a member of the union.

Through this study it is possible to identify whether or not participants had carried out these activities since attending the training course. As we had participants from three types of course it would be possible for us to consider whether there was any significant differences in the ability to have carried out these tasks and the actual type of course they had attended. The following section will look at some of these individually and others as groups to demonstrate the results.

#### **4.8 Giving a recruitment talk to a group**

Participants were asked if they had carried out a recruitment talk to a group since they had attended their training course: their responses are shown in Table 4.3.

**Table 4.3: Delivered a Recruitment talk to a group (n=305)**

Mode	Yes	No
5 day residential	10 (11.9%)	74 (88.1%)
Mixed mode 2/3	29 (22.7%)	99 (77.3%)
2 + 2 + 2	73 (78.5%)	20 (21.5%)

The chi-square test yielded  $\chi^2 = 103.001$ ,  $df=2$  and  $p \approx .000$ . The value of  $p < .05$  demonstrated that there was a statistically significant difference between the mode of training and whether or not the participants had carried out a recruitment talk to a group. **Participants from the five day residential course and the mixed mode 2/3 course were less likely than participants from the 2+2+2 course to have presented a recruitment course. There seems to be a firm suggestion that the 2+2+2 course has an important outcome not shared by the first two courses.**

In relation to the research question “will the mode of training impact on the post-course behaviour of participants”, this data demonstrated the superiority of the 2+2+2 course over the five day residential course and the mixed mode 2/3 course in relation to the likelihood that course participants would present a recruitment talk within a reasonable time after course participation. The importance of this finding lies in the fact that recruitment is one of the fundamentally important roles a union representative can be involved in. The future and survival of a trade union relies on



the continuous process of recruiting new members. The majority of workplaces in which the participants would be performing their role would provide a facility for the union representative to present at a recruitment opportunity with other trade unions. The individual would need to feel confident about their knowledge of the benefits of the union and be able to handle difficult questions and statements from prospective members in relation to their union compared to other unions available for them to join. 78.5% of participants attending the 2+2+2 course reported that they had delivered a recruitment talk to a group. This was vastly reduced to only 22.7% in the mixed mode course and a staggeringly low level of 11.9% in the five-day residential course. In reality this means that the union training course provided through the five-day and mixed mode arrangements were not as effective at preparing representatives to take on this crucially important function. For the union this would mean large numbers of workplaces where its representatives were not taking part in recruitment talks and opportunities to recruit new members were lost or diminished resulting in a lower power base for negotiation and a lower income stream.

**The data suggests that participants on the 2 + 2 + 2 course are over six times more likely to have delivered a recruitment talk to a group than the five day residential course participants.** These results are so striking and important on their own and demonstrate the importance of including the concept of self efficacy and confidence in the training of union representatives. It is such an important role for the union to have local representatives carrying out local workplace recruitment exercises. Peterson and Royalyn (2005) suggest that human performance is a critical resource to an organisation and trainers will find it wise to include these measurements in performance evaluation.

#### ***4.9 Participants' responses to other activities***

Table 4.4 shows the responses from the participants to selected items from the questionnaire in relation to whether or not they had been active in the particular task listed, by mode of training course.

**Table 4.4: Participants responses to selected items, by mode of training (n=305)**

Item	Five Day	Mixed mode	2 + 2 + 2	$\chi^2$
Recruitment of individuals	Y 30 N 54	74 54	85 8	59.682*
Observing a hearing	Y 13 N 71	21 107	75 18	117.509*
Represented at a disciplinary	Y 7 N 77	19 109	74 19	133.858*
Represented at a grievance	Y 10 N 74	13 115	74 19	140.825*
Informal representation	Y 26 N 58	61 67	80 13	58.512*
Giving advice	Y 37 N 47	101 27	91 2	70.011*
Discussed their role	Y 28 N 56	63 65	82 11	59.126*
Attended negotiations	Y 23 N 61	56 72	80 13	67.067*
Attended mentor sessions	Y 14 N 70	21 107	76 17	118.752*
Discussed cases for learning	Y 21 N 63	49 79	81 12	79.203*
Written a statement	Y 7 N 77	20 108	76 17	138.747*

Y = Yes, N = No. \* Indicates  $p < .05$ , so there was a statistically significant difference

It was noted that 26 participants from the five day residential course had undertaken informal representation with management (yes=26), but 58 had not (no=58). Taking a second example, 80 participants from the 2+2+2 course had attended negotiations on behalf of a member (yes=80), but 13 had not (no=13). For each item in the table, the Chi Squared value indicated a statistically significant difference between the response to an item and the mode of training. In all 11 of the key tasks of the representatives' role larger proportions of the participants recorded a positive involvement in the task when they had attended the 2 + 2 + 2 course in relation to the five day residential or mixed mode courses.

Macleod and Daley (2007) reported the following comments in their research that support some of the items here:

*'I'm giving a lot more **advice** when staff have got say a complaint or anything, to say well you could go down this line, or this has happened because of such and such.'*

*'I've had lots of people coming to me before the course and given them **advice** and hoped that's right but after the course I felt a lot more confident. I've been elected to Vice staff side chair yesterday so I've been putting it all into practice.'*

In relation to the research questions "Do the confidence levels of trade union representatives differ depending on the type and delivery method of the course they attend" and "will the mode of training impact on the post-course behaviour of participants", these data demonstrated the differences in outcomes between the five day residential course where No's were more common than Yes's, the mixed mode 2/3 course where the number of Yes's and No's were more equal, and the 2+2+2 course where Yes's were more common than No's, almost the opposite outcome to the five day residential course. These differences between mode of training and participant response were statistically significant. That is, these differences were associated with the different modes of training, and not just a result of chance.

It is of particular note to consider the results around representing members of the union at disciplinary and grievance hearings. These are important areas of work for a trade union and one of the main reasons individuals site for joining. In the past they have often been the one area of a representative's work that is not taken up by individuals even after attending training. This data demonstrates that in relation to both of these tasks participants who attended the traditional five day residential course only 8.3% had represented members at disciplinary and grievance hearings.

Over 90% of participants on this type of course had not done so. In comparison participants who attended the 2 + 2 + 2 course show a surprisingly different result. In this instance 79.6% of participants have carried out representation at a disciplinary and grievance.

One interpretation of these differences is that the different delivery method of the courses does have an impact on the post course behaviour of the participants. It would appear that those participants who attend the 2 + 2 + 2 course are more likely to have performed these tasks six months post the course than those from the five day residential and mixed mode courses. It would seem that the process of re-designing the exercises and incorporating web based materials and distance learning resources has resulted in participants reporting higher numbers in the fulfilling of the tasks. It is also possible that having smaller 'bite-sized' training spread over a period of time gives the participants time to consolidate the learning and gain a fuller understanding before adding further learning at the next session. To be able to tease out the exact reasons for the differences further research would need to be carried out with an emphasis on finding out why and what actually made them report higher numbers.

This is extremely significant from a professional point of view. If local union representatives do not carry out these tasks the paid union officers have to fill the gap. If the union is able to increase the number of local union representatives who will carry out these tasks then the paid employees of the union can concentrate on the more difficult issues or ultimately the union may not need to employ so many paid employees.

#### ***4.10 Confidence levels of key tasks of a union representative***

The second part of the research questionnaire considered the participants' type of course that they had attended and the confidence levels they recorded for specific aspects of their role as a trade union representative since they had attended the training course. They were asked to mark their confidence level as not confident to carry out the role, or having a low level of confidence, or moderately certain they could carry out the role, fairly confident or highly confident that they could carry out the specific task.

Due to the numbers of participants (305) in this research in most questions the original 5 x 3 table violated the assumption that individual cell frequencies should not be less than 5. Consequently cells were amalgamated to form a 3 x 3 table which amalgamated participant's responses as follows:

- i) None or little confidence = not confident
- ii) Moderately confident and fairly confident = reasonably confident
- iii) Highly confident = highly confident

Using these recoded results the following results were found and are recorded on the following pages.

The following results relate to the confidence levels that participants expressed about completing particular activities that would be common tasks for a union representative after completing the training course.

Table 4.5 shows the confidence levels expressed by participants when asked about tasks around recruitment of members to the union.

It is noted that 31 participants from the five day residential course indicated that they were not confident in accessing recruitment materials and 40 said they were reasonably confident and 13 reported a high level of confidence. Taking a second example, 6 participants from the 2+2+2 course indicated that they were not confident in using the unions PowerPoint presentation, 40 reported reasonable confidence and 47 were highly confident. For each item in the table, the Chi Squared value indicated a statistically significant difference between the response to an item and the mode of training.

**Table 4.5: Participants responses to recruitment items and their confidence, by mode of training delivery (n=305)**

Item	Five day	Mixed mode	2 + 2 + 2	$\chi^2$
Doing a recruitment presentation	NC 37	17	4	115.028*
	RC 41	76	21	
	HC 6	35	68	
Talking about union membership benefits	NC 43	3	0	142.095*
	RC 26	65	23	
	HC 15	60	70	
Accessing recruitment materials	NC 31	8	0	76.012*
	RC 40	73	41	
	HC 13	47	52	
Using the Union powerpoint presentation	NC 46	35	6	74.413*
	RC 31	69	40	
	HC 7	24	47	
Persuading a nurse in another union to join up	NC 52	16	2	128.379*
	RC 25	80	38	
	HC 7	32	53	

NC=not confident; RC= reasonably confident; HC= highly confident

\* Indicates  $p < .05$ , so there was a statistically significant difference

In relation to the research question “Do the confidence levels of trade union representatives differ depending on the type and delivery method of the course they attend?” these data demonstrated the differences in outcomes reported based on mode of training. These differences between mode of training and participant response were statistically significant. That is, these differences were real differences as a result of the different modes of training, and not just a result of chance. Typically the five day residential course participants reported lower levels of confidence than reported by participants in the mixed mode 2/3 course, but the participants in the 2+2+2 course reported the highest level of confidence. For

example, in the item “Persuading a nurse in another union to join” fewer than 10% of the five day residential course reported high confidence, fewer than 30% for the mixed mode course, but more than 55% of participants in the 2+2+2 course reported a high level of confidence: here  $\chi^2 = 128.379$  (df = 4,  $p \leq .000$ ).

Trying to persuade someone who is a member of one union to change and join another is felt to be an extremely difficult task and between some unions, unethical. The persuader could face rejection and even ridicule and anger from the person targeted for persuading. 62% of the participants who attended the five day residential course did not feel confident in carrying out this task. Table A5.8 shows that over 60% of participants attending the five day residential course report not having recruited individuals. These two statistics appear to support each other in that it may well be concern they feel about how they will be received, affects their confidence level to perform these functions. Likewise, from table A5.8, we can see that over 90% of participants attending the 2 + 2 + 2 course reported that they had carried out recruitment activities of individuals. Also participants from the same type of course demonstrate over 95% feeling reasonably confident or highly confident to persuade a nurse in another union to join (table 4.5). This suggests that one could infer a positive response to the research questions “Will the mode of training impact on the post-course behaviour of participants”, “Can the confidence levels of trade union representatives, as course participants, predict the transfer of knowledge and skills learned on a course into the local workplace to demonstrate their effectiveness to deliver in their trade union role” and “Are those representatives with higher confidence levels more likely to carry out the specific activity they express confidence over than those with low levels of confidence?”

Table 4.6 builds on table 4.5 and covers roles of representatives that could be seen as strategic rather than operational. For example, over 60% of participants on a five day residential course reported that they were not confident to develop a recruitment strategy but only 4% of participants are not confident in this area, if they attended a 2 + 2 + 2 course.

**Table 4.6: Participants responses to strategic items and their confidence, by mode of training delivery (n=305)**

Item	Five day	Mixed mode	2 + 2 + 2	$\chi^2$
Describing key role of steward	NC 48	7	0	182.581*
	RC 28	97	31	
	HC 8	24	62	
Talking about the benefits of being a union representative	NC 44	9	1	130.641*
	RC 29	83	32	
	HC 11	36	60	
Developing a recruitment strategy	NC 53	27	3	165.247*
	RC 26	87	28	
	HC 5	14	62	
Networking in the workplace	NC 44	19	2	123.598*
	RC 34	77	27	
	HC 6	32	64	

NC=not confident; RC= reasonably confident; HC= highly confident

\* Indicates  $p < .05$ , so there was a statistically significant difference

In fact in all of these items there are larger percentages of high confidence expressed in participants from the 2 + 2 + 2 courses that the five day residential or mixed mode courses. Again, in relation to the research questions we can see demonstrated that the mode of training does impact positively on the reported confidence levels; participants report higher levels of reasonable or highly confident when they have attended a mixed mode course in relation to a five day residential course. Participants record even higher levels of reasonable and highly confident levels when they have attended a 2 + 2 + 2 course compared to the other two types of courses.

The following comment, that supports the items around recruitment, was expressed in the work of Macleod and Daley (2007):

*'I think one of the things that I hadn't been very active in doing was raising the profile locally of the RCN. Coming out of this I'm active now in Gateshead. Heavily involved in all of the agenda for*



*change, job matching, profiling. I haven't had any comparable role to do but **even just raising the profile locally**, points of contact, that has helped in both cases that has been as a consequence'*

#### **4.11 Diversity and Equal Opportunities**

During the past five years diversity and equal opportunities have been important and key issues for trade unions. In fact they have been important issues for the country with a number of changes to the way in which these matters are dealt with and the supportive organisations (such as the equal opportunity commission) are organised and structured. Trade unions in the healthcare sector have focused on this area of work during these years in an attempt to improve how they deal with the issues and in order to make the organisation more attractive to a wider range of people from differing ethnic backgrounds. I therefore felt it was important to include a specific question in this study around this area of work. Table A5.4 shows that the majority of the sample (around 80%), in line with the overall membership figures of the organisation, was from a white British ethnic background. Historically the organisation's representatives do not appear to have felt equipped to deal with diversity and equal opportunity issues. Table 4.7 outlines the results of the confidence levels participants recorded in relation to advising members on diversity and equal opportunity matters. This is supported in the results from the traditional five day residential training course results: Nearly 65% of participants feel not confident about advising members on these matters, nearly 30% feel reasonably confident but only 6% feel highly confident about giving advice in this important area of work for a union representative. However, those that attended the 2 + 2 + 2 course show a different result: 54% and 44% report reasonable levels of confidence and high levels of confidence respectively. These results are statistically significant [ $\chi^2 = 116.909$ ,  $df=4$ ,  $p \leq .05$ ].

**Table 4.7: Confidence levels around Diversity matters, by mode of training course (n=305)**

Course attended	Not confident	Reasonably confident	Highly confident
5 Day residential	54	25	5
Mixed mode	25	85	18
2 + 2 + 2	2	50	41

In relation to the main research question it would appear that the training mode does indeed affect the level of confidence reported by participants on different courses. The union was keen to improve the service to members in this area and it could be assumed that the representatives with the higher confidence levels will be more aware of racial issues and more likely to take on the task of giving advice to members on these matters.

#### ***4.12 Confidence levels when dealing with a disciplinary case***

In this part of the questionnaire a case scenario was described. This scenario had been validated by a group of experienced representatives as a simple case that a representative should be able to deal with having attended the training course. The whole task of representing a member at a disciplinary hearing was broken down into 14 sub tasks that make up the whole. These tasks can be grouped together into three main areas of work: Table 4.8 shows the group of tasks related to preparation before the disciplinary hearing event; Table 4.9 groups the tasks that are required during the disciplinary event; and table 4.10 considers the tasks required as background to be able to deal appropriately with the disciplinary hearing.

It is of interest to note that the traditional five day residential course has the lowest level of ‘highly confident’ reports, than the other two courses. On this course a half day of the course is spent on preparing for a role-play disciplinary hearing. This study demonstrates that this mode of training has a range of 56-66% of participants reporting feeling not confident in relation to these items. The range of reported not confident in these items for the mixed mode course is 7-26%; whereas the range for

the 2 + 2 + 2 course is down to a range of 1-6% of participants reporting no confidence in the tasks.

**Table 4.8: Confidence levels for preparation of a disciplinary tasks, by mode of training course (n=305)**

Item	Confidence	Five day	Mixed mode	2 + 2 + 2	$\chi^2$
Interviewing member	NC	50	11	1	162.885*
	RC	27	88	30	
	HC	7	29	62	
Completing statement	NC	47	10	1	147.564*
	RC	32	83	31	
	HC	5	35	61	
Preparing case for hearing	NC	55	26	4	184.564*
	RC	26	91	27	
	HC	3	11	62	
Preparing questions for member	NC	52	23	5	168.659*
	RC	29	90	26	
	HC	3	15	62	
Preparing questions for management	NC	54	33	5	167.194*
	RC	28	85	28	
	HC	2	10	60	

NC=not confident; RC= reasonably confident; HC= highly confident

\* Indicates  $p < .05$ , so there was a statistically significant difference

If there is an assumption that participants will be more likely to carry out a task if they express confidence in being able to carry out that task, then these results are of significance. The results show that those participants attending the 2 + 2 + 2 course report between 94-99% reasonable or highly confident in relation to these tasks. The mixed mode course shows a range of 74-92% with a higher number of reports within the reasonable confidence category as opposed to the higher confidence category. The five day residential course reports a range of 35-44% of participants being

reasonably or highly confident, however the highest percentage in the high confidence category is only around 8%.

In relation to the research question “Do the confidence levels of trade union representatives differ depending on the type and delivery method of the course they attended?” these data demonstrated the differences in outcomes based on the mode of training and these were real differences and were statistically significant; they were a third better due to the mode of training and not just a result of chance.

In relation to the research question “Will the mode of training impact on the post-course behaviour of participants?” we can view these data alongside the data provided in table A5.10 which considered whether participants had actually represented a member in a disciplinary hearing. Nearly 80% of those on the 2 + 2 + 2 course reported that they had carried out a representation at a disciplinary whereas only 8% reported this from those participants on the five day residential course.

It would appear that these data, alongside the data on actual behaviour would support a positive response in relation to the research questions: “Can the confidence levels of trade union representatives, as course participants, predict the transfer of the knowledge and skills learned on a course into the local workplace to demonstrate their effectiveness to deliver in their trade union role?”, “Are those representatives with higher confidence levels more likely to carry out the specific activity they express confidence over than those with low levels of confidence?” and “Can confidence levels in trade union training act as a marker for the transfer of skills from training to practical local use?”.

Further, if we look at the item regarding confidence levels in completing a statement of events, we see that 37 (44.1%) of participants from the five day residential course indicate that they are reasonably or highly confident whereas 92 (98.9%) indicate the same from the 2 + 2 + 2 course. Comparing this with the data of those that had written a statement for a member it can be seen that only 7 (8.3%) of participants from the five day residential course and 76 (81.7%) of participants from the 2 + 2 + 2 course indicate that they have written a statement of case for a member. This would suggest that the higher confidence levels recorded for the item above do indicate that the participants have been more likely carry out the task thus enabling it to be said

that confidence levels in trade union training may act as a marker for the transfer of skills from training to the practical use.

Table 4.9 shows participants' responses to selected items from the questionnaire in relation to tasks actually performed during a disciplinary hearing, by the mode of training course. For example, 58 (69%) participants from the five day residential course indicated that they were not confident to represent a member at a disciplinary hearing, 24 (28.6%) said they were reasonably confident and only 2 (2.4%) reported a high level of confidence. Table A5.10 demonstrated that only 7 (8.3%) of this group had carried out a representation at a disciplinary hearing. In considering the 2 + 2 + 2 course we can see that only 6 (6.5%) report being not confident in representing a member in a disciplinary hearing, 26 (28%) indicate they are reasonably confident and 61 (65.6%) indicate a high confidence level. Table A5.10 shows that 74 (79.6%) of this group had carried out a representation at a disciplinary hearing. Therefore, in relation to the research question "Are those representatives with higher confidence levels more likely to carry out the specific activity they express confidence over than those with low levels of confidence?" these data demonstrated the differences in outcomes based on the mode of training and the participants' responses were statistically significant therefore suggesting a relationship between the mode of delivery of the training course, the participants confidence levels and their implementation of the task following training.

Further support for this position can be found in the responses of Macleod and Daley's (2007) research:

*'...and he also got us very much into role-plays which I think really helped because when you were actually faced with real issues you thought 'yes' I've already done that in a role-play and it wasn't that terrible and I thought 'I can do it'.'*

*'Eventually with this person in the end there was some consequence of their action which was quite sad really but I don't think if we hadn't have done the role play, because in my head I was going through all the bits that we did in the role-play that I would have just panicked with that and I would have been wrong and been absolutely useless to this person but I felt, you know that just being with them that I was offering correct support that I was able to tell the Regional rep and let them know everything that was happening and kept them up to speed and they in turn had a little bit of work to do instead of having to do it all themselves.'*

**Table 4.9: Confidence levels for tasks during a disciplinary hearing, by mode of training course (n=305)**

Item	Five day	Mixed mode	2 + 2 + 2	$\chi^2$
Presenting case at disciplinary	NC 58	38	6	170.722*
	RC 24	80	26	
	HC 2	10	61	
Questioning/cross examining of management/witnesses	NC 61	43	8	170.206*
	RC 21	78	27	
	HC 2	7	58	
Summing up a case	NC 56	33	5	160.818*
	RC 25	84	30	
	HC 3	11	58	
Making notes during a disciplinary	NC 47	15	1	124.722*
	RC 31	94	47	
	HC 6	19	45	
Supporting member with decision	NC 50	15	1	164.747*
	RC 29	93	33	
	HC 5	20	59	

NC=not confident; RC= reasonably confident; HC= highly confident

\* Indicates  $p < .05$ , so there was a statistically significant difference

Another important part of the actual representing of a member in a disciplinary is being able to question and cross examine the management. This is often difficult for a local union representative because the manager presenting the case is often the union representative's manager also. The data for this item suggests that participants on the five day residential course find this difficult and report low levels of high confidence, 2 (2.4%), 21 (25%) of reasonable confidence and high levels of not being confident at 61 (72.6%) of participants. In comparison 58 (62.4%) participants from the 2 + 2 + 2 course indicated that they were highly confident, 27 (29%) reasonably confident and only 8 (8.6%) not confident. The following quote from

Macleod and Daley's (2007) research of a participant on one of the new courses sums this up:

*'I feel more able to challenge management and I think they contact staff side more often, when they know they should be as they realise I am more empowered and will question them.'*

If union representatives feel confident to question and cross examine managers, we should be able to see this reported positively in table 14 which considered whether or not participants had represented members in an informal meeting with management. The data shows that 80 (86%) of participants from the 2 + 2 + 2 course had carried out an informal representation compared to only 26 (31%) of those participants from the five day residential course. Therefore in relation to the research question "Are those representatives with higher confidence levels more likely to carry out the specific activity they express confidence over than those with low levels of confidence?" and "Can the confidence levels of trade union representatives, as course participants, predict the transfer of the knowledge and skills learned on a course into the local workplace to demonstrate their effectiveness to deliver in their trade union role?" these data would suggest that the outcomes based on the mode of training are significant and do have a relationship in support of this proposition.

Macleod and Daley's (2007) small scale qualitative research with some of the 2 + 2 + 2 courses support further other items in this group. If we consider the matter of making notes during a disciplinary hearing one respondent remarked:

*'I think it has again given me confidence and made me make a point of saying to people or I have kept my own minutes if people haven't formally kept minutes, say the working party, I've kept my own personal minutes, which is a bit more than I used to do.'*

The data from this study shows that, in relation to this item, 37 (44%) participants from the five day residential course indicate they were reasonably or highly confident to carry out this task. 92 (98.9%) participants from the 2 + 2 + 2 course indicate that they are reasonably or highly confident to carry out the task. This demonstrates that the confidence levels of trade union representatives do differ depending on the type and delivery method of the course they intended. There is, at

the very least, a doubling of the result of the reasonable and high confidence reporting in this instance.

**Table 4.10: Confidence levels for background tasks for a disciplinary hearing, by mode of training course (n=305)**

Item	Five day	Mixed mode	2 + 2 + 2	$\chi^2$
Referring to disciplinary procedure	NC 54	17	2	161.598*
	RC 25	94	38	
	HC 5	17	53	
Referring to relevant employment law	NC 60	31	4	145.326*
	RC 19	88	45	
	HC 5	9	44	
Referring to relevant evidence	NC 54	25	5	188.580*
	RC 28	94	27	
	HC 2	9	61	
Advising on options	NC 51	28	4	172.027*
	RC 29	92	29	
	HC 4	8	60	

NC=not confident; RC= reasonably confident; HC= highly confident

\* Indicates  $p < .05$ , so there was a statistically significant difference

Again, the items in this table demonstrate much the same as the previous tables; participants who attended the 2 + 2 + 2 course are more likely to express a higher confidence level than those who attended the five day residential course. Again some comments from Macleod and Daley's (2007) work support:

*'The 2 days were well structured and I feel I have gained knowledge and now feel that I have more confidence to volunteer to take part in other meetings. I am looking forward to applying new knowledge in practice'*

*' a bit more confidence, but basically just gaining the knowledge of how things are going, because I have been in a fairly senior post and understand the politics, so its background knowledge, employment laws and that kind of thing.'*



It is noted, 44 (47.3%) participants from the 2 + 2 + 2 course indicated that they were highly confident in referring to relevant employment law whereas only 5 (6%) participants from the five day residential felt highly confident in this task.

Again, in all of these items, the differences between mode of training and participant response were statistically significant. That is, these results were real differences correlated with the different modes of training, and not just a result of chance.

#### ***4.13 Discussion***

In the previous sections of this chapter we have considered the results of specific elements of the research tool and analysed these to demonstrate the positive bearing these suggest for this work in the area of trade union representatives training.

The first part of the research tool concentrated on the participants type of course that they had attended and what, if any, activity they had been involved on six months after the course. Overall the results demonstrate that 96.8% of those that had attended the 2+2+2 course had been active in the six months following the course. This was reduced to 85.9% for the mixed mode course and reduced drastically to only 42.9% for those attending the five-day residential course. In all the other 13 elements of this section of the research tool participants reported higher positive answers of being active in a range of union tasks. These results alone are compelling evidence for the tutor in the trade union setting to use in demonstrating the effectiveness of one course over another. The main aim of union representatives training is to prepare them to be able to carry out these tasks in their own workplaces. In reminding ourselves of Kirkpatrick's (1994) levels of evaluation [Table 2.1] these results demonstrate evaluation at level three and four. Participants who have attended the 2+2+2 course were more likely to have changed their behaviour and taken their learning into the workplace, putting it into direct practice. They have been more likely to carry out their union role in the workplace which could be judged as a final result that has occurred because the participant attended that particular training programme.

The second and third parts of the research tool concentrated on the confidence levels of participants attending the three courses focusing on 24 specific tasks that a trade union representative may be expected to do in their role.

In all 24 role aspects the percentage of participants expressing high confidence in the task was considerably higher in the 2+2+2 course than the mixed mode and five-day residential courses. Much higher levels of participants expressed themselves as not confident from the five-day residential course; In the 24 elements covered these percentages ranged from 37% to 73%, an average overall of well over 50% of those attending this type of course not being confident at the roles expected of them. Whereas, those participants attending the 2+2+2 course, only an average of 3.5% expressed not being confident in the roles.

These are striking results and well worth the professional tutor in the trade union taking notice of when planning the mode delivery of course in the future. Bandura (1997) refers to methods that can strengthen confidence levels; Paulsen and Betz (2004) made useful suggestions of methods to strengthen self-efficacy beliefs; and Fortune et al (2005) found that self-efficacy may be enhanced by considering the sources of information people used. All these may well be important and all maybe more present in the 2+2+2 course mode delivery than the five-day residential course resulting in the higher confidence results being expressed. I am also drawn back to the comments made to me during the phase one part of this research in Europe and acknowledge that elements outside of the actual training can have an effect on the outcome of the training. In summary the results of this study would lead one to believe that, aspects of the mode of delivery of the course, does have an effect on the confidence levels participants express six months after the course. In this study larger numbers of participants expressed higher confidence levels having completed the 2+2+2 course than the other two courses. These same participants demonstrated that they had also been more likely to be active in a number of roles of a trade union role following the course.

Alvarez et al (2004) suggests two key areas affecting the transfer performance from training to the workplace; Self-efficacy and a positive transfer environment. This study has focused on the confidence levels of participants that pertains to self-efficacy but the second point is worthy of comment. The workplace in which trade union representatives operate is not controlled by the union or the union's training department. The results of this study thus could be affected by the workplace environment. However, this would have required a large part of the sample set of the 84 participants attending the five-day residential course to have been recruited from workplace environments that were not conducive to them taking up their roles on

returning from the course. Likewise it would mean that a very large proportion of those attending the 2+2+2 course came from workplace environments that had some form of positive impact on the participants to encourage them to take part in trade union activities and express more positive confidence levels. As the union has no control in this matter it is more likely that participants come from a spread of employment type situations. Due to the numbers involved, the numbers of participants and the limited number of employment units they could have come from the samples are more likely to include representatives from a the full range of employment units. It is likely that there were participants on each of the three types of courses from the same employment units and have ruled out any effect of transfer environment on the results of this study.

During the literature review chapter I have described the developments of training evaluation since the time that Donald Kirkpatrick developed his four stage model. Although the model has served the training domain well a number have expanded and developed it further. Kraiger et al (1993) expanded the model with the purpose of linking learning outcomes to training evaluation. Bowers et al (2009) modified the Kirkpatrick model for application to clinical settings basing the stages on the effects seen from clients and patients perspectives.

Pineda (2010) suggests that the manner in which organisations evaluate their training is far from what would be desirable in order for evaluation to really serve as a tool for optimising training quality. They suggest the need for several strategies and requirements:

- Evaluation means comparing results with a previously defined reference. This should be the situation expected to be achieved due to the training, often expressed in the form of objectives.
- Evaluation plan should be based on a detailed analysis of the existing material and functional possibilities for its implantation.
- Evaluation plan must be accepted by everyone involved in the evaluation, and be fair and realistic.
- Ensure that training is the main cause of the results obtained, and isolate the possible effects of other factors in the organisation.

- Evaluate training that is strategic for the organisation or that plays an important role.
- Distribute the evaluation results in order to optimise the training and enhance its contribution towards obtaining the organisations goals (Pineda, 2010).

However, this study demonstrates that the use of the Kirkpatrick model still holds good for the evaluation of trade union representatives training. Much of this study incorporates the strategies suggested by Pineda. The three modes of delivery reference were described in the form of objectives and a measurement tool was devised; a feasible and realistic evaluation was carried out; the organisation accepted the plan as they have continued to implement change based on the findings; there is strong support for agreeing that a relationship exists between the positive results and the type of training course and the evaluation focused on one manageable part of the whole system. Through the concepts of self assessed confidence measures it can be demonstrated that there is a strong relationship between the mode of delivery of a training course and the stage three behaviour and the stage four results for the organisation. Thus, the conclusion of the study would suggest that confidence levels of trade union representatives do differ depending on the type and delivery method of the course that they attend. It would also conclude with a positive affirmative response to the supplementary questions of the study:

- The mode of training does impact on the post-course behaviour of participants with those attending the 2+2+2 courses having a more likely positive response than those from the other two courses and resulting in more of these representatives actually performing some of the key roles of a union representative in the workplace;
- There appears to be a strong relationship between the confidence levels of participants and the transfer of knowledge and skills into behaviour and actions in the workplace in delivering in their trade union role with those expressing higher confidence levels appearing to also be involved in delivery six months post course.

#### ***4.14 Relation to other research work***

It is difficult to relate this research to similar research in the field of trade union representatives training courses. as this is the area of originality of this research; in aiming to expand the evaluation of trade union representatives training into levels three and four from the usual areas of level one and two of the Kirkpatrick model Kirkpatrick (1994). I have used concepts commonly used in other fields of work and applied them here.

Having carried out this analysis the results suggest a close relationship of expressed confidence levels and the prediction of actual behaviour. That is, if participants have expressed a high confidence level around a particular task then they have, more often than not, also expressed a positive response to a behaviour associated with that task. It is also clear that participants' confidence scale response is related to the mode of the training course they have attended.

These data and this interpretation is consistent with the findings reported by Lannigan (2001); she developed seven instruments used in evaluating a training programme for new Tellers in a Bank. One of these instruments was a self-efficacy tool designed to measure the trainees' perceived confidence in carrying out Bank Teller behaviours. Another instrument recorded behavioural intentions and a further measured actual behaviour once the trainees had returned from the training course. The conclusion of the study clearly highlights that self-efficacy (confidence levels) can predict actual behaviour and can also provide evaluators with information as to what areas of the training programme are effective and ineffective. In the context of this professional doctorate study this is extremely important as this study will be used to further develop and implement evaluation processes for trade union representatives training in order to ensure that courses provided are both value for money, a good return on investment but above all providing competent, capable and confident representatives that are likely to put learning into practice on their return to their workplaces.

Alpay and Walsh (2008) suggest that it is the small incremental changes in self-belief and confidence that motivate many students towards further skills development, and inevitably greater situation and task specific self-efficacy (Alpay and Walsh, 2008) and Rottinghaus et al. (2003) clearly outline that two decades of work around these concepts have enhanced our understanding of educational and career behaviours of

individuals by noting the powerful influence of perceived self-efficacy, or one's self-belief in successfully completing a specific task (Rottinghaus et al., 2003). Beech (2003) used a rigorous longitudinal research design and demonstrated changes in confidence levels reported by participants on a course on 'management of aggression unit for student nurses'; it was demonstrated that these confidence levels were associated with behaviour change immediately post course that were still apparent three months later in the clinical setting (Beech, 2003).

Bandura (1982) interestingly discusses the issue of collective Efficacy; a subject that would interest those in the trade union world in which this study is located. Trade unions, by their very nature, are often involved in social activism and collective action. Bandura suggests that the strength of groups and organisations lie partly in people's sense of collective efficacy that they can solve their problems and improve things through concerted effort. However, collective efficacy is rooted in self-efficacy and those with little self-belief will not become part of a collective movement for change.

As mentioned in the literature review of this study there are a number of meta-analyses across different areas of interest that confirm the influential role of a perceived self-efficacy on actual behaviour (Holden, 1991, Holden et al., 1990, Moritz et al., 2000, Multon et al., 1991, Sadri and Robertson, 1993a, Stajkovic and Luthans, 1998). None of these relate to the area of training for trade union representatives so this work builds on these and expands the concept into other areas where it should apply satisfactorily.

Finally, it is also worth noting that the very fact that those studied have attended a course recently (within the six months prior to completing the questionnaire) may also have a positive effect on their self-efficacy and confidence levels. The course in itself is designed to develop the skills of the participants and it is likely that confidence in these skills is closely related to the specific training programme. Borgen and Betz suggest that "one does not normally become a skilled musician without music lessons, nor a productive scientist without a degree in science" (Borgen and Betz, 2008), and Carmicheal and Taylor (2005) noted that confidence levels were affected by the period of time since studies had taken place with individuals recording lower levels of confidence than those that had studied more recently (Carmichael and Taylor, 2005).

#### ***4.15 Summary***

In this chapter I have analysed some aspects of the findings of the research in support of the four research questions:

1. Do the confidence levels of trade union representatives differ depending on the type and delivery method of the course that they attend?
2. Will the mode of training impact on the post-course behaviour of participants?
3. Can the confidence levels of trade union representatives, as course participants, predict the transfer of the knowledge and skills learned on a course into the local workplace to demonstrate their effectiveness to deliver in their trade union role?
4. Are those representatives with higher confidence levels more likely to carry out the specific activity they express confidence over than those with low levels of confidence?
5. Can confidence levels in trade union training act as a marker for the transfer of skills from training to practical local use?

Based on the data, I believe that this study has demonstrated that confidence levels of trade union representatives do differ depending on the type and delivery method of the course they were a participant. In most of the items used in this research it can be seen that a higher level of confidence has been recorded by participants who had attended the 2 + 2 + 2 course than the mixed mode or 5 day residential courses.

This study has also recorded significantly higher numbers of participants from the 2 + 2 + 2 course reporting positive responses in relation to actual activity that they have carried out as a trade union representative following the course and on their return to their workplace, than from the mixed mode and 5 day residential courses. Some of these activities relate directly to some of the items measured for confidence levels; in these instances both confidence levels and activity levels are higher in participants who attended the 2 + 2 + 2 course than the other two courses and therefore we can assert, with confidence, that the participants expressed confidence level can predict the transfer of the knowledge and skills learned on a course into the local workplace to demonstrate their effectiveness to deliver in their trade union role. In activities that do not relate to confidence items used in the research it would be necessary to perform further research in this area but from these results it does

appear to be a positive result. From this result it would appear that those participants that record higher confidence levels are more likely to carry out the specific activity than those recording lower levels of confidence.

In overall conclusion I believe that confidence levels in trade union training can act as a marker for the transfer of skills from training to practical local use and that this will be a useful tool for use in this area in the future. This will assist trade union representative training tutors to demonstrate the value of their work and the return on investment for the union. It will also assist in highlighting individuals weak points and enable more focused guidance and attention on those areas. This will help individuals to avoid any further loss to the organisation in terms of representatives trained to be able to perform in a capable manner, competently and confidently.



## **5. CONCLUSIONS AND RECOMMENDATIONS**

### ***5.1 Introduction***

This chapter describes the culmination of one journey and the commencement of another. The completing journey has included my description of this study and the professional importance to me personally and my interests in my working life. Unfortunately, due to a culmination of a reorganisation in the organisation and a long period of ill health I departed from my position from the organisation and had to take a year out of the process of writing this thesis. The work reported in this report was intended to be one part of a wider and larger study. I would have wanted to follow through the quantitative study with some further qualitative study. However, the quantitative data has been supported by some qualitative material from another small-scale study by MacCleod and Daley (2007).

I have described the concepts and ideas that have provided the background to this study and the paradigm I have worked within to present the findings and discuss an analysis of this data. It is important to remember the reason for the journey (study); working in the area of trade union representatives' training I needed to identify ways of demonstrating the importance of that work to the organisation. When many organisations, both commercial and public, find themselves in difficult and tight financial times it is often the training department and its services that first feel the threat of reduction or even complete closure to save money for the organisation at large. My belief is that this is short sighted; however, other departments of organisations often seem more able to argue the importance of themselves to the wider future of the organisation and overall value for money (return on investment).

Global competition and investors increasingly demand accountability for results and government departments see the same pressure to contain budgets and achieve greater results from expenditure (Phillips and Stone, 2002). These writers build on the four stages outlined by Kirkpatrick (1994); Reaction, Learning, Behaviour and Results, and expand the stages into six key indicators. This study has used the basis of the four stages as background; the aim being to increase the evaluation of trade union training through more of the stages to guarantee an ability to show the importance of the training to the organisation as a whole, in the future. In order to develop this idea I developed some quantitative research using confidence scales to compare the impact of a number of different types of course being delivered. In

addition, some qualitative research, with a very small sample, carried out by MacCleod and Daley (2007), has also been included where it appears to support the main research findings.

This is an original piece of research in having visited two European countries, I have developed conversations with Trade Union educators across the TUC and carried out a literature search I came to the conclusion that there was little research into evaluation of trade union representatives training and none at all that considered work around confidence or the Kirkpatrick (1994) stages of evaluation. Whilst there is a body of research around confidence scales for other areas these have not been used to measure the area of trade union representative training; this study has applied that research to this area of work and demonstrated it can be usefully used to articulate evaluation at various stages.

## ***5.2 The Research Questions***

- 1. Do the confidence levels of trade union representatives differ depending on the type and delivery method of the course that they attend?**
- 2. Will the mode of training impact on the post-course behaviour of participants?**
- 3. Can the confidence levels of trade union representatives, as course participants, predict the transfer of the knowledge and skills learned on a course into the local workplace to demonstrate their effectiveness to deliver in their trade union role?**
- 4. Are those representatives with higher confidence levels more likely to carry out the specific activity they express confidence over than those with low levels of confidence?**
- 5. Can confidence levels in trade union training act as a marker for the transfer of skills from training to practical local use?**

Taking into consideration the research questions I will now pull together my conclusions of this journey in this chapter. Then make recommendations for the future journey.

### **5.3 *The Conclusions of this study***

Being a creature of habit, when I embarked on this study, I was sceptical that I would be able to demonstrate anything significant. Alongside the small group of colleagues I worked with I believed that the traditional five day residential course as a delivery method worked well; participants appeared to learn a lot of information; enjoy their experience on the course and leave with a renewed enthusiasm for taking forward their role as a trade union representative. The evaluation carried out at level one and two (Kirkpatrick, 1994) demonstrated good levels of customer satisfaction and a positive response when participants were asked what they had learnt in relation to course objectives.

Prior to this study, evaluation was not carried out at Kirkpatrick's (1994) level three and four; participants on courses were not followed up after returning to their workplaces so the organisation was unaware of the nature of any behaviour change following the training and its effect on the organisation overall such as the return (financial and other) or intangible benefits, as Phillips and Stone (2002) key indicators. This study resulted in the development of a much improved and robust system for measurement of the effectiveness of trade union training across the four levels of evaluation. The development of specific confidence scales matched against the course objectives and the application of these enabled a much thorough and insightful evaluation of the participants' right through the levels of evaluation.

In one part of the research tool (questionnaire) ten tasks of being a trade union representative were identified. The three differently delivered courses covered all ten of these tasks under the objectives of the courses. In all ten examples participants recorded higher confidence levels around these tasks when they attended the mixed mode delivery method and the 2 + 2 + 2 course delivery method. In all ten examples confidence recordings were lowest in the five day residential courses and highest in the 2 + 2 + 2 course. In all ten examples the results were shown to be statistically significant. The research tool (questionnaire) also examined the confidence levels of participants in 14 tasks that altogether made up the process of representing a union member at a disciplinary hearing described in a scenario that was judged to be a type of case that a fairly new union representative should be able to manage. Similarly, the results demonstrated that participants recorded higher confidence levels that were statistically significant after they had attended the 2 + 2 + 2 course compared to the other two course delivery methods. From this evidence I conclude that this study has

demonstrated that the confidence levels of trade union representatives do differ depending on the type and delivery method of the course they attend.

Participants in the study were asked an overall question about whether or not they had been active as a union representative following attendance on the training course. Below half (42.9%) of those who attended the five day residential course recorded that they had been active whereas a high 85.9% had been active from those that attended the mixed mode delivered course. However, a massive 96.8% of those who attended the 2 + 2 + 2 course had been active as a trade union representative since attending the course. The research tool (questionnaire) highlighted 12 tasks of a union representative and simply asked participants to indicate whether or not they had performed the activity. In the majority of these tasks higher percentages of the participants who attended the mixed mode course compared to the five day residential course had performed these tasks since attending the training. The percentages of those positively being active in these activities were extremely and statistically significantly higher in the 2 + 2 + 2 course. In two areas of these tasks; recruitment of individuals and giving advice to members over 90% of participants recorded a positive involvement. In the other 10 tasks four reported over 70% of participants and six reported over 80% of participants being actively involved in the activity. From this evidence I conclude that this study demonstrates that the mode of training does impact on the post-course behaviour of participants.

In considering the information above, it can be demonstrated that those participants who attended the 2 + 2 + 2 course, and to a smaller extent, the mixed mode course, expressed higher levels of confidence than those attending the five day residential course. They were also more likely to have been involved in the tasks of trade union representatives and been active locally in their workplace. In view of this evidence I conclude that those participants with higher levels of confidence are more likely to carry out specific activities of trade union representatives, that the confidence levels do act as markers in demonstrating the transfer of skills from the training courses to practical local use and they do predict the transfer of the knowledge and skills gained on the training course into the local workplace, thus demonstrating their effectiveness to deliver their trade union role.

#### **5.4 Recommendations from this study**

It would seem that the process of re-designing the exercises and incorporating web based materials and distance learning resources has resulted in participants reporting higher numbers in the fulfilling of the tasks. It is also possible that having smaller ‘bite-sized’ training spread over a period of time gives the participants’ time to consolidate the learning and gain a fuller understanding before adding further learning at the next session. To be able to tease out the exact reasons for the differences further research would need to be carried out with an emphasis on finding out why and what actually made them report higher numbers.

From the results of this study it would appear that the work on equal opportunities and diversity was not as strong as other task areas of the role. The confidence level results around giving advice on equal opportunities and diversity matters were not as strong as other tasks. This highlights another benefit from this type of study; it assists the trainers to look for areas of study that need further work and input.

A number of the TUC trade union representative trainers made encouraging and supportive comments regarding the focus of this study; they were interested in my questions around competence in the workplace and confidence following training as they felt this was the key test of the worth of the job/role that they were performing. This would suggest a need for further study and research and discussion amongst those involved in this work to include the following ideas:

- The setting of tasks and activities to carry out in the workplace during and after the courses or between blocks or sessions. This would give participants the chance to try out some of the things learned on the course. Their experiences are then fed back, both good and bad, at the next session and a discussion is generated. This ensures that representatives engage with their membership on returning to the workplace, even at a minimal level, and reinforces the practical nature of the course they are attending.
- Representatives should set themselves realistic goals around what is possible in their particular workplace; setting objectives that would work in a large employer with a high union density and a number of supportive representatives around will probably not work in a much smaller employment situation with low membership and no other representatives with an unsupportive management environment. They should consider their own experience, the support structures and facilities

they have available. Often sharing experiences with a more experienced colleague will help an individual develop in the role.

- Developing post-course networks to avoid ‘burn-out’ following the attendance on a course.

In order to fully evaluate at level four of the Kirkpatrick model (1994), results on the organisation, further research and study would be required with involvement of others. For example it would be possible to compare this studies result alongside research with the full time union officials who would be able to report on the effects of individual local representatives on the work of the organisation. Taffe and Knipe (2005) compared self-efficacy results with interview data and experience reports and this type of study would further strengthen the evidence presented here (Taffe and Knipe, 2005).

This area of research is of a particular professional interest to me and I hope to others. There are limitless suggestions that could be made regarding future studies and re4search in this area that would support this research in some way. When I was commencing my research journey I considered other methods and ideas of research but now put them forward for others to consider:

- Ethnographical studies of representatives in their local workplaces to elucidate the factors that make a good and effective representative;
- Biographical studies of trade union representatives to tell their full development stories from first involvement moments and major impacts on their development;
- Phenomenological approaches could be used to interview those members of unions who have had cause to need a good representative and capture the essence that makes up the effective representative, interviews of managers in workplaces regarding their experiences of working closely with effective representatives and the full till time union officials who support the local representatives to ascertain what they believe makes up an effective representative.
- Longitudinal studies with a mixed method focus on specific courses and follow participants through their learning journeys.

## 5.5 *Summary*

Throughout this study and my work around confidence levels, I have often been reminded of a simple quote from my days as a health visitor:

*“Perhaps a child who is fussed over gets a feeling of destiny; he thinks he is in the world for something important and it gives him drive and confidence.”*

Dr Benjamin Spock (1903-1998) American Paediatrician and author

Perhaps this is the essence of the process we go through when we try and help people to become more confident through learning. Overall I feel a sense of satisfaction in completing this study. As this is a study connected to my professional work I am particularly pleased that in some small way I will have contributed to the improvement of the training of trade union representatives. A doctorate in education needs to focus on practical problems or issues that have a direct effect on the professional practice of education or teaching rather than an area of pure academic interest alone (Neuramann, 2005).

If I have been able to improve the ability and delivery of the very people described in the anonymous poem at the beginning of this thesis paper, it will have all been worth it. I believe that I have done that in one small way; demonstrating that it is possible to continue to ensure a trade union has competent, capable and confident local representatives through training courses delivered in different modes of delivery other than the traditional five day residential model. This should encourage wider participation in the trade union representative role in the future.

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Using the following scale please tick the box that most matches how you feel about carrying out the task described:

1	Not Confident – can not do this task at all (1)
2	Low level of confidence – not entirely sure I can do this task (2)
3	Moderately certain I can do this task (3)
4	Fairly confident I can do this task (4)
5	Highly certain and confident I can do this task (5)

		1	2	3	4	5
1.	Interview an RCN member in order to complete a statement of their case.					
2.	Complete/write/document a chronological statement of events for an RCN member.					
3.	Prepare an RCN member for a disciplinary hearing.					
4.	Prepare your presentation for a disciplinary hearing.					
5.	Prepare questions for an RCN member during a disciplinary hearing.					
6.	Prepare questions for management and witnesses during a disciplinary hearing.					
7.	Presenting an RCN members case during a disciplinary hearing.					
8.	Questioning and cross questioning an RCN member, management and witnesses during a disciplinary hearing.					
9.	Summing up an RCN members case during a disciplinary hearing.					
10.	Making notes during a disciplinary hearing.					
11.	Supporting an RCN member with a decision at a disciplinary hearing.					
12.	Referring to the procedure to ensure a fair disciplinary hearing.					
13.	Referring to relevant employment law and evidence during a disciplinary hearing.					
14.	Advising an RCN member on their options following a disciplinary hearing.					



## **APPENDIX 2: COVERING LETTER SENT OUT WITH QUESTIONNAIRE**



*the*  
**UNIVERSITY**  
*of*  
**GREENWICH**

**Andrew I Barton**

**Edd Research Student**

**C/O School of Education and Training**

**Avery Hill Campus**

**Email: [ba661@greenwich.ac.uk](mailto:ba661@greenwich.ac.uk)**

**To: Union Representatives following**

**Foundation Skills Course attendance**

**Evaluation of stewards training – six months post course**

Please find enclosed a questionnaire that is aimed at evaluating the training you have completed in the past year to help you in your voluntary role as a union representative. I am a student researcher on the Doctorate in Education programme at the University and the purpose of this research is part of my thesis for this award. The results will be written up within my thesis and may feed into the debate around the future provision of training courses for union representatives. The responses you make will be kept for the duration of the research project. On completion of the thesis the responses will be shredded (this is expected to be no later than September 2011).

This questionnaire will be sent out to a large number of participants. They can be completed and returned anonymously. However, if you do want to seek further help or guidance or require feedback then you will need to complete your name in the relevant section of the questionnaire.

Following analysis of the returned questionnaires it is the intention to seek follow-up interviews with a number of participants. You will be contacted separately if it is the intention to follow-up your response with an interview.

It is extremely important that we aim to receive honest and open evaluation from you. If anything regarding this letter or questionnaire is of a concern to you or you wish to discuss this research further please contact me via the email address above.

Thank you for your time.

Yours sincerely

Andrew I Barton

**APPENDIX 3: QUESTIONNAIRE**

**RCN STEWARDS FOUNDATION SKILLS COURSE: 6 MONTH  
EVALUATION**

Please complete the following in as much detail as possible. Your views are important to us. Where applicable please tick  the appropriate box that meets your answer to the question.

1. *Name*.....

2. *What is your Gender?*

	Male	Female
	<input type="checkbox"/> (1)	<input type="checkbox"/> (2)

3. *What is your Age?*

18-25 yrs	<input type="checkbox"/>	(1)
26-35 yrs	<input type="checkbox"/>	(2)
36-45 yrs	<input type="checkbox"/>	(3)
46-55 yrs	<input type="checkbox"/>	(4)
56 yrs plus	<input type="checkbox"/>	(5)

4. *What is your ethnic background?:*

Black British	<input type="checkbox"/>	(1)
White British	<input type="checkbox"/>	(2)
Asian British	<input type="checkbox"/>	(3)
Irish	<input type="checkbox"/>	(4)
Black Caribbean/Africa	<input type="checkbox"/>	(5)
Asian	<input type="checkbox"/>	(6)
Mixed	<input type="checkbox"/>	(7)
Other	<input type="checkbox"/>	(8) Please state: .....

**5. Which RCN Region are you a Steward in?:**

South West	<input type="checkbox"/>	(1)
South East	<input type="checkbox"/>	(2)
London	<input type="checkbox"/>	(3)
Eastern	<input type="checkbox"/>	(4)
East Midlands	<input type="checkbox"/>	(5)
West Midlands	<input type="checkbox"/>	(6)
North West	<input type="checkbox"/>	(7)
Yorkshire and Humber	<input type="checkbox"/>	(8)
Northern	<input type="checkbox"/>	(9)

**6. Which type of Steward Training course did you attend?:**

5 Day residential	<input type="checkbox"/>	(1)
2 Day distance Learning Plus	<input type="checkbox"/>	(2)
3 Day Residential		
2 Day Introduction plus 2 Day Representatives skills course (including 2 Day Distance Learning)	<input type="checkbox"/>	(3)
1 Day Module Course spread Across 5 weeks	<input type="checkbox"/>	(4)
Other model/Pattern	<input type="checkbox"/>	(5)

7. *Since your Training Course, have you been active as a Steward?*

Yes  (1)  
 No  (2)

8. *If yes, please indicate which of the following activities you have carried out:*

		Yes	(1)	No	(2)
(a)	<i>Recruitment talk to a group</i>				
(b)	<i>Recruitment of individuals</i>				
(c)	<i>Observing a disciplinary or grievance hearing</i>				
(d)	<i>Represented a member at a disciplinary hearing (formal)</i>				
(e)	<i>Represented a member of a grievance hearing (formal)</i>				
(f)	<i>Represented a member in meetings with Management (informal)</i>				
(g)	<i>Given advice to members</i>				
(h)	<i>Discussed your role with Management</i>				
(i)	<i>Attended negotiations on behalf of members</i>				
(j)	<i>Attended mentor/support session</i>				
(k)	<i>Discussed cases to assist your learning</i>				
(l)	<i>Written a statement of case for a member</i>				

9. *Do you receive sufficient support//mentoring from the RCN for your role as a Steward?*

Yes  (1)

No  (2)

Please indicate your response to the following statements by ticking the relevant box number using the following scale:

1	Not Confident – cannot do this task at all (1)
2	Low level of confidence – not entirely sure I can do this task (2)
3	Moderately certain I can do this task (3)
4	Fairly confident I can do this task (4)
5	Highly certain and confident I can do this task (5)

		1	2	3	4	5
<b>10.</b>	<b><i>Doing a recruitment presentation to a group of new Student Nurses</i></b>					
<b>11.</b>	<b><i>Approaching an individual nurse and talking about the benefits of RCN Membership</i></b>					
<b>12.</b>	<b><i>Accessing relevant recruitment materials from the RCN</i></b>					
<b>13.</b>	<b><i>Using an RCN Powerpoint Recruitment presentation</i></b>					
<b>14.</b>	<b><i>Persuading a nurse in another trade union to consider joining the RCN</i></b>					
<b>15.</b>	<b><i>Describing the key elements of the Stewards' role</i></b>					
<b>16.</b>	<b><i>Talking to colleagues about the benefits of becoming an RCN Representative</i></b>					
<b>17.</b>	<b><i>Developing a recruitment strategy within your workplace</i></b>					
<b>18.</b>	<b><i>Networking on behalf of the RCN in your workplace</i></b>					
<b>19.</b>	<b><i>Advising members on Diversity and equal opportunity matters</i></b>					

**PLEASE READ THE FOLLOWING SCENARIO:**

Judy returned from Annual leave on a late shift. She took handover and was the registered nurse in charge of the 25 bedded medical ward. She carried out the drugs round at 2 pm and failed to realise that there were two patients with similar names. Consequently she gave each of these patients the wrong drugs. Once realising her mistake, 30 minutes later, she reported the matter to the doctor and the senior nurse. Both patients were informed of the mistake and neither of them suffered any ill effects.

Referring to this scenario, please indicate your response to the following statements by ticking the relevant box number using the following scale:

1	Not Confident – can not do this task at all (1)
2	Low level of confidence – not entirely sure I can do this task (2)
3	Moderately certain I can do this task (3)
4	Fairly confident I can do this task (4)
5	Highly certain and confident I can do this task (5)

		1	2	3	4	5
20.	<i>Interview Judy in order to complete a statement of case for her.</i>					
21.	<i>Complete/write/document a chronological statement of events relating to Judy's case.</i>					
22.	<i>Prepare your presentation for a disciplinary hearing, representing Judy regarding the above scenario.</i>					
23.	<i>Prepare questions for Judy that you will ask during the disciplinary hearing.</i>					
24.	<i>Prepare questions to ask management and at the disciplinary hearing.</i>					
25.	<i>Presenting Judy's case during the disciplinary hearing.</i>					
26.	<i>Questioning and cross questioning Judy, management and witnesses during the disciplinary hearing.</i>					
27.	<i>Summing up Judy's case during the disciplinary hearing.</i>					
28.	<i>Making notes during the disciplinary hearing.</i>					
29.	<i>Supporting Judy with the decision at the disciplinary hearing.</i>					
30.	<i>Referring to the procedure to ensure a fair disciplinary hearing.</i>					
31.	<i>Referring to relevant employment law during the disciplinary hearing.</i>					
32.	<i>Referring to relevant evidence during the disciplinary.</i>					
33.	<i>Advising Judy on her options following the disciplinary hearing.</i>					

THANK YOU FOR COMPLETING THIS QUESTIONNAIRE. PLEASE RETURN TO ANDREW BARTON AT THE ROYAL COLLEGE OF NURSING USING THE STAMPED ADDRESSED ENVELOPE ENCLOSED.

**APPENDIX 4: VALIDATING THE CASE SCENARIOS USED IN THE  
RESEARCH TOOL**

In order to better measure training events in the future we need to consider developing a tool that will help us capture the learning and applied outcomes of training, six months after a course was attended. Please follow these instructions:

1. Please read the attached scenarios one at a time. Consider each one from the suitability of a representative being able to manage the case six months after their initial training.
2. Apply the criteria to help you grade each of the cases into complex cases, moderate cases and straight forward cases and mark your result in the table.

<b>Category of case</b>	<b>Criteria applying to this category of case</b>
<b>Straight Forward case</b>	<ul style="list-style-type: none"> <li>• Would take up to five hours of preparation</li> <li>• Would be a single/simple issue</li> <li>• None or few witnesses</li> <li>• Result might be verbal/written warnings</li> </ul>
<b>Moderate case</b>	<ul style="list-style-type: none"> <li>• Would take 1-2 days preparation</li> <li>• Might be one serious issue or multiple issues</li> <li>• May have more than one witness</li> <li>• Result might be written/final written warnings</li> </ul>
<b>Complex case</b>	<ul style="list-style-type: none"> <li>• Would take over three days preparation</li> <li>• Might be one very serious issue or many allegations</li> <li>• Would have a multitude of witnesses</li> <li>• Result in dismissal/ET/referral to NMC</li> </ul>

<b>Case scenario</b>	<b>Category of case</b> (complex, moderate or straight forward)
<p>1. David worked in the intensive care unit as a senior staff nurse. He was also responsible for developing learning packages for the junior staff on the unit. He decided to test a junior staff nurse's knowledge and skills around the use of the ventilator and changed the language setting on a patient's ventilator. During the course of the shift a number of staff looked after this patient and did not recognise the changes to the ventilator. At one point the ventilator alarmed and the nurse looking after the patient was confused by the readings as they were not in English. This nurse cared for the patient correctly and dealt with the discomfort the patient had suffered. Afterwards she found out that David had changed the settings as a teaching method and complained that this was inappropriate and had put the patient at risk unnecessarily. David's response was to treat the whole episode as a joke and suggested the staff should not take this so seriously as he was trying to improve care through teaching.</p>	
<p>2. Judy returned from annual leave on a late shift. She took handover and was the registered nurse in charge of the 25 bed medical ward. She carried out the drugs round at 2pm and failed to realise that there were two patients with similar names. Consequently she gave each of these patients the wrong drugs. Once realising her mistake, 30 minutes later, she reported the matter to the doctor and the senior nurse. Both patients were informed of the mistake and neither of them suffered any ill effects.</p>	
<p>3. Mathew was working in charge of a medical ward on night duty. He was on his fourth night in a row and had not been sleeping well during the day-time. At approximately 1am he had to deal with one of the patients who became very confused and disorientated. This was witnessed by two members of staff; one reported that Mathew was firm and raised his voice because the patient was hard of hearing; the other suggested he shouted at the patient and was rude to her.</p>	



## GLOSSARY

B.E.R.R	Department for Business, Enterprise and Regulatory Reform [now BIS]
B.I.S	Department for Business, Innovation and Skills
D.F.B	Department for Business [now BIS]
D.G.B	German Trade Union Confederation
D.T.I	Department for Trade and Industry [now BIS]
E.T.U.C	European Trade Union Confederation
IG BCE	Mining, Chemical and Energy Industrial Union [Germany]
IG Metall	Industrial Union of Metalworkers' [Germany]
L.O	Swedish Trade Union Confederation
S.A.C.O	Swedish Confederation of Professional Associations
T.C.O	Swedish Confederation for Professional Employees
T.U.C	Trade Union Congress

