

Name:	Merseytravel
Size:	954
Sector:	Public sector transport
Location:	North West

The organisation

Merseytravel is the operating name for the Merseyside Transport Authority and Merseyside Transport Executive. The Authority sets transport policy, the Executive delivers it. Led by a board of 18 elected counsellors, there are three operational parts, Mersey Tunnels, Mersey Ferries and the Merseyside Passenger Transport Executive. Voted the best Passenger Transport Authority twice in the last three years, it achieved Investors in People Champion status in 2006 and has signed up to the Skills Pledge.

The employee occupational and skills profile is diverse, ranging from front-line customer service staff to police officers, ferry captains and policy advisors. Over 90 per cent of staff are union members represented by four unions (UNISON, Unite, GMB and UCATT).

The history of workplace dialogue

The organisation has a well-developed framework for workplace dialogue, the centrepiece of which is the Joint Learning Forum (JLF). This framework evolved as a strategic response to a critical Audit Commission report, which suggested that levels of customer service, and workforce skills, could be improved. At the time, the three operational parts of Merseytravel each had distinct cultures, policies and practices. Workforce dialogue was under-developed, industrial relations poor and, in areas such as Mersey Tunnels, channels of communication between management and unions had broken down. The unions in the discrete businesses had no process of joint dialogue, and there were issues with sickness absence and staff retention.

A new learning and development manager was appointed by Merseytravel's Chief Executive and was charged with changing the culture of the organisation through a focus on increased investment in learning and skills development. The manager, with the support of the organisation's Directors, has played a key role in driving forward developments in workforce dialogue around training and skills. Through a deliberate policy of working in partnership with the trade unions a series of initiatives were implemented. A JLF was established, a formal learning agreement signed and a number of projects initiated, with financial support from

the Union Learning Fund, under the banner of Merseylearn. The learning agreement is a framework agreement only and sets out the key principles around working together and the role of ULRs. It is explicitly 'firewalled' from other industrial relations arrangements. Somewhat uniquely, the learning and development manager also plays the lead role in managing the ULF funded Merseylearn projects.

The success of the JLF stimulated a renewal of broader structures of workplace dialogue within the organisation. A Joint Consultation Forum of senior management and union representatives was established to look at issues of corporate policy for example, around stress at work and to implement a drive to standardise policy and practice throughout the organisation.

To ensure that individual employees are also able to discuss skills needs with their line manager, a Performance Development Review (PDR) scheme was introduced for all staff.

How are training and skills discussed?

The JLF is unique in that it drives, in partnership, all facets of training, learning and development. It is not restricted to matters of personal development, but also includes all work and job related training, organisational development, corporate training strategy, Investors in People accreditation, the PDR roll-out and specific learning initiatives. It reports directly to the Chief Executive's management team, which then reports to the Authority. The deliberations of the JLF are also fed into all other channels of workplace dialogue.

The JLF is comprised of 16 members, including four management representatives, four senior union learning representatives, finance, a couple of external representatives from the local Learning and Skills Council and local union bodies (such as the Transport and General Workers Union and TUC unionlearn) and project workers. It meets every six weeks and has a formal agenda, although anyone can table an issue for discussion. The modus operandi of the JLF is underpinned by partnership working and the rationale that learning is an issue around which mutual gains dialogue can be developed. It is not a forum for negotiation and a climate of adversarialism is absent. Healthy debate takes place and there is joint feedback, but, according to participants, it is often difficult to tell 'who is the management and who is the union'. It sets targets on, for example, the delivery of Skills for Life initiatives, the development of training plans and Investors in People accreditation visits and participants are expected to report back on progress.

Alongside the JLF, there is a separate committee of all trade union learning representatives (ULRs). This occurs two weeks' after the JLF. It is a forum where the views of individual staff can be specifically directed and general

implementation of learning matters discussed. Discussions are then fed-back into the JLF.

At an individual level, staff input is communicated via the unions through a network of around 26 ULRs and to management via the PDR process. The PDR is a formal structure of performance appraisal between individual staff and their line managers. It is conducted on an annual basis with six-monthly updates. From this, a system of competency needs analysis is elaborated on a departmental basis.

What have been the benefits from dialogue on training and skills?

A systematic and coherent learning culture has been developed, that has resulted in:

- 3 sustainable learning centres, which have been accessed by over 90 per cent of the workforce since 2004, funded by two successful Union Learning Fund grants. The Merseylearn project funded by the ULF has been matched funded by the company through staff time, the provision of physical resources for the learning centres and by making the three original temporary project workers' contracts permanent.
- Entitlement to 'time-back' in lieu for IT training and European Computer Drivers Licence courses, and interest free computer loan for enrolment on learning activity;
- 90 per cent of staff with a Level 2 qualification, a 50 per cent increase in three years, and 400 NVQs started;
- 95 per cent of staff have a PDR;
- 165 National test passes in literacy and numeracy;
- Targeted upskilling of managerial competencies;
- Improvements in the culture of industrial relations. Dialogue and partnership working has become more embedded across all aspects of the organisation, resulting in enhanced levels of communication and trust between management and staff. Grievances over minor issues are more likely to be resolved through open discussion, rather than through time-consuming formal processes;
- A two-day reduction in staff sickness absence rates and a staff turnover rate of just 4.7 per cent;
- Sixteen per cent increase in internal promotions.
- Improved industrial relations through more co-ordinated union working across the organisation

Key challenges and top tips

The key challenge of establishing dialogue was overcoming rooted perspectives on employee relations and widespread resistance to learning amongst employees, who had associated previous drives for learning with staff

retrenchment. For many, management and unions alike, there was comfort in adversarial relations. There were suspicions about the motives for partnership working, and concern amongst some staff that the greater focus on learning and training would be linked to job retrenchment and job upheaval.

These challenges were overcome through talking critics around by highlighting the potential benefits of dialogue over learning. A significant application to the Union Learning Fund acted as a spur in terms of initial momentum and demonstration of what could be achieved. If undertaken again, it was suggested that an initial joint training exercise involving management and union representatives would have helped foster a more common ethos from the start.

The biggest challenge for the future relates to sustaining levels of funding and managing the expectations of staff now committed to receiving regular learning. The recent successes will be tested by a planned programme of organisation change over the next 18 months. But much has been learnt, and the organisation is embarking on this change programme through rounds of structured workplace dialogue and staff participation from the start.