

## **The Future of Work in the Public Sector: Learning and Workplace Inequality**

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## **Executive Summary**

- The relationship between qualifications, job and reward is a complex one. In this report the focus is on the changing boundaries of jobs which have traditionally been categorised as unskilled and, in particular, the relationships between learning, occupational mobility and patterns of workplace inequality. The research on which the report is based is located in the public sector where there are large concentrations of workers in this category and dramatic changes to the organisation of work provide a valuable setting in which to investigate work and learning. This is particularly timely given the Government's interest in promoting lifelong learning and employability.
- Workers who occupy jobs on the lowest grades are a heterogeneous group. They tend to be younger workers (male and female), women returners to the labour market, and older workers who are either close to retirement or above retirement age. A large proportion are part-time.
- Although they are less qualified than the workforce as a whole, the majority have higher levels of qualification than those required for their jobs. This is especially true of younger age groups.
- There is evidence of upskilling and job enrichment, although this was experienced by different workers as a positive or negative development depending on the social context in which it was occurring. There were also examples of work intensification and deskilling, while a number of people felt trapped in routine, monotonous jobs.
- The changing nature of care work is one area where significant changes are occurring, with implications for workplace learning as these jobs are professionalised. As responsibility for many of the frail elderly has shifted from the NHS to Social Service provision, care staff who in the past have been regarded as manual workers, are increasingly being required to take on tasks previously done by trained nurses. Equally, these changes transform the context of cleaning and other support work. There is considerable variation in the extent to which domestics and other non-care staff are included in training opportunities.
- A range of innovative initiatives can be identified in learning and teaching in the workplace. We highlight the significance of employee-initiated activities and the positive contribution that can be made by supervisors and managers. However, not all employees have such opportunities available to them and we also outline a range of barriers to workplace learning. Some staff may appear to be disinterested in a particular training initiative, but this should not be interpreted as meaning that they are disinterested in learning per se. There are many examples of staff involved in a range of activities, but not wishing to take part in certain management led programmes, or not wishing to be involved at this point in time.
- The findings suggest that the questions: 'who initiates?' and 'who benefits?' are significant to staff perceptions of particular learning experiences. Equally, the questions 'who pays?' and 'who benefits?' are raised by the redrawing of boundaries between the public and the private sector; between different parts of the public sector; and within large public sector organisations.
- The findings should be valuable to those concerned with promoting lifelong learning and, in particular, to inform employers', trade unionists' and other professionals' understanding of the opportunities and constraints affecting the capacity of workers on the lowest salary grades to engage in workplace learning.

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## **The Future of Work in the Public Sector: Learning and Workplace Inequality**

### **Context**

The analysis of workforce inequality has rarely focused on unskilled workers as a category, although studies of race, gender and particular forms of labour contract (for example, part-time hours, home-working) or of specific occupational groups (such as catering workers, hospital cleaners and care workers) have addressed unskilled work indirectly<sup>1</sup>. In this research project, which is part of the ESRC's 'Future of work' programme, we focus on the changing boundaries of work which is classified as unskilled and in particular, the relationships between learning, occupational mobility and workplace inequality for those who occupy such posts. The project is therefore concerned with two distinct, but related questions. The first concerns the changing nature of work which is considered to have a low skill content and a routine nature, thereby attracting low pay and status. The second concerns the workers who occupy these positions in the organisation of production. They may have low levels of initial qualification which may affect their job aspirations, though with increasing levels of participation in education, overall levels of qualification in the workforce are rising. Factors such as initial educational attainment and job aspirations interact with ascriptive characteristics such as class, gender and race, which shape their labour market experiences.

It is immediately apparent that the category 'unskilled work' is problematic and we have encountered a number of difficulties in conducting this research in describing the categories of jobs and people that we are researching. Although the work that is done is classified as unskilled and in terms of salary and status it is low paid, this does not necessarily mean that the workers themselves are unqualified or do not have a professional approach to their work. They may use their experience, skills and educational qualifications in their jobs and have a good understanding of what additional skills and knowledge would allow them to do their jobs more effectively. Indeed, the moment the assumption that wages are linked to the individual's investment in education and training which underlies human capital theory are questioned (see for example, Bowles and Gintis, 1975) a series of new questions emerge. For example, labour market segmentation theories point to employers' use of gender and race to differentiate labour force as a means of social control (for example, Wilkinson, Ed. 1981). The analysis of the social construction of work points to the ways in which groups of workers establish their bargaining position vis-à-vis the employer and other groups of workers in relation to the supposed skill content of the work they do (Cockburn, 1983). Consequently, labour market institutions and interactions have a role in establishing hierarchies in the workplace which systematically disadvantage certain categories of workers. These do not necessarily reflect either the initial qualifications of the work force nor the skills they acquire through formal training programmes and experience, but rather the worth which is attached to their work as reflected in job grades. Therefore unskilled work is defined in relation to other categories of work which are rewarded more highly and therefore deemed to have a higher skill content.

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<sup>1</sup> See, for example, Wrench and Virdee, 1996 on race; Bradley, 1997 on gender; Phizacklea, 1990 on race and gender. As far as the nature of the employment contract is concerned, Beechey and Perkins have examined part-time working which is invariably low paid and predominantly women's work (1987) and Phizacklea and Wolkowitz's study of homeworking (1995) demonstrates the intersection of cultural controls and gender to produce a particularly exploitative form of employment. Other studies have been based on specific occupational groups, for example, catering workers (Gabriel, 1988) and hospital cleaners (Hart, 1991).

Changes in the boundaries of jobs and the national policy context of lifelong learning in which all employees are now being encouraged to take responsibility for learning are the context for exploring access to learning opportunities in the workplace. Local government and hospital trusts in the public sector provide a valuable site to explore the relationship between unskilled workers, work reorganisation, and strategies towards training and development. Some of the largest concentrations of employment of unskilled and routine work can be found here, with comparative job security in a labour market which is increasingly casualised. There has been a period of dramatic change to lower grade work in the public sector. In some areas there has been a shift toward generic work organisation (multi-skilling or multi-tasking) with the removal of traditional lines of demarcation between different tasks. With a move away from national pay and grading structures, generic working is taking a myriad of different forms which are still emerging, combining manual and clerical work, combining jobs previously regarded as male or female, such as cleaning and portering in the health service, or even combining manual and semi-professional caring activities as in the case some healthcare assistants. These changes may be driven by the need for cost efficiency, changes to service demands, reduced needs for certain staff through technological change, the shortages of skilled staff, or a combination of these factors. In this context, access to training and development can take on a new significance and there may be opportunities for the development of new routes into occupational qualifications and job mobility. In addition legislation on community care, the care of the mentally ill, child protection has had a direct impact on the organisation of work, the required skill mix and the training required by staff.

There are substantial changes taking place in service delivery, with central government reforms driving a number of significant developments. These include the introduction of 'Best Value' as opposed to compulsory competitive tendering in the provision of local government services and the involvement of the private sector in investing in new buildings through the Private Finance Initiative. In the health service government requirements on mental health and care in the community are leading to major reconfigurations of trusts, while initiatives such as 'Working Together' are forcing trusts to consider how they involve staff from all levels in their decision making processes. At the same time there are a range of pressures towards professionalisation: this is particularly the case in personal social services where the distinction between nursing and social care has shifted. Change has been facilitated to some extent through the developments in industrial relations: the single status agreement in local government and the introduction of elements of local bargaining in the health sector. The public sector's support for the National Education and Training Targets is evident in many organisations' commitment to achieving the Investors in People (IIP) standard and in adopting competence-based assessment in the form of National Vocational Qualifications (NVQs). They have contributed to Human Resource strategies which emphasise the extension of development reviewing and managers' consideration of the training and development needs of staff in a wide range of occupations within organisations. In addition, the unions organising workers in the lowest grades in the lowest grades (Unison, TGWU and GMB) have taken initiatives on training and development, both as an item on the collective bargaining agenda and as a potential arena for developing approaches based on social partnership with the employer (on the latter, see Munro and Rainbird, *f/c*). Unison, in particular, has been developing partnerships with employers on employee development which have been cited as a model of good practice in official government publications. For example, the green paper 'The Learning Age' refers to them as an example of 'partnership in action' (DfEE, 1998:36) and they are quoted in the Employment Action Plan as an example of how the government is meeting its commitment to the European Union to promote employability through social partnership (Hall, 1998).

The Labour Government has been actively promoting the development of approaches to learning and development based on social partnership, for example through the provisions in the Employment Relations Act (1999) for employers to inform trade unions of their training plans where they are recognised under the new procedures for trade union recognition. Although this affects a minority of workplaces, the Department of Trade and Industry anticipates that this model will be adopted more widely as an example of 'good practice'. National and European policy debates on lifelong learning emphasise the need for all employees to engage in lifelong learning (Delors et al., 1996; DfEE, 1998). In particular, they stress the need for individuals to take responsibility for their own learning as a means of promoting adaptability in their current employment, employability in the wider labour market in the event that they need to seek employment elsewhere, and as a means of preventing social exclusion.

Given this context, we wanted to examine the extent to which patterns of access to learning opportunities in the workplace contribute to the reproduction of inequality or have the potential to challenge it. The project is well-placed to contribute to on-going debates relating to lifelong learning and to inform employers' and trade unionists' understanding of the opportunities and constraints affecting the capacity of workers on the lowest salary grades to engage in workplace learning.

### **Objectives**

The central questions addressed by this research are:

- What are the changes in manual work and routine clerical jobs which contribute to an increased emphasis on training and development?
- Is there a relationship between qualifications and work for these categories of workers?
- How do individuals learn in the workplace? How do they perceive the relationship between learning (inside and outside the workplace) and their jobs? What factors in the workplace contribute to the motivation to learn?
- If formal learning and instruction in the workplace has purposes other than the transmission of skills and knowledge, how can this be understood and interpreted?
- How does learning (inside and outside the workplace) contribute to occupational mobility and employability?
- What are the barriers and disincentives to learning in the workplace? How do these relate to the presence or absence of career structures, the organisation of the training function, management structures, service delivery objectives, payment and industrial relations systems? What measures have been effective in overcoming these disincentives?
- What is the contribution of job design and the social relations of the workplace to the creation of an environment for learning and development?
- What is the contribution of learning which is not directly work-related (employee development, trade union education, leisure education) to participation in work-related training and the ability to take on new job roles?
- What is the role of trade unions in establishing frameworks for learning opportunities and as providers and facilitators of learning?
- What are the conditions for establishing and promoting lifelong learning amongst these categories?

## **The research project**

There are two major elements to the research: case studies of three local authorities and three NHS trusts and a survey of employees' learning experiences. Unison facilitated access to all six organisations which were chosen because they have established partnership agreements with Unison on the provision of learning and development opportunities for low paid/unskilled workers. At corporate level they have a formal commitment to equal opportunities in employment and to the development of employees through the achievement of the Investors in People (IIP) Standard. Therefore they provide opportunities to examine innovative practice as far as the target group of workers are concerned. They were also chosen for differences in function and in the nature of the local labour market from which they draw their labour forces.

The case studies involved semi-structured interviews with senior and line managers, trainers, and union representatives at different levels. This has been complemented by more intensive observation of particular departments, involving face-to-face interviews with individual employees, their managers and supervisors. Overall, more than 300 face-to-face interviews have been conducted in the six case study organisations.

The survey was conducted in one local authority and one health service trust. It was a self-completion postal survey which aimed to gain a picture of the educational and competence profile of the workforce, including details of recent employment-related training and educational participation.

## **The Case Study Organisations**

### *The City Council*

This large local authority is based in the Midlands and has a workforce of over 30,000. The city is a major centre of industry and commerce which affects the nature of the labour market from which the City Council recruits. Manufacturing industry is central to its economic base, especially engineering and metalworking industries. It is also a major centre for the services sector, including banking, insurance, communications, business services and health services.

The City Council publishes an annual policy framework document. In 1999-2000 it reaffirmed its goals as improving the quality of life; securing the city's future; tackling inequality, discrimination and disadvantage; and involving local people in decisions which affect them. In implementing this agenda, three developments are particularly significant. Firstly, the extension of consultation and community involvement at the local level. Secondly, the piloting of the Labour Government's 'Best Value' approach to the delivery of public services in a number of departments. The duty to obtain 'Best Value' involves a requirement to provide value for money, to bench mark the standard of services and to be accountable to local communities. Thirdly, the development of new committee structures to meet the challenges of cross-service working and organisational change. The City Council is committed to equal opportunity in employment and to providing training and development which give staff the knowledge and skills to do their jobs well and improve the quality of services provided to the local community. All the departments studied either had or were committed to achieving the Investors in People standard, though in some cases this was being done on the basis of individual business units within departments.

At the time of the fieldwork, the local authority was organised into 13 departments: Social Services, Education, Environmental Services, Transportation, Leisure and Community Services, Housing, Planning and Architecture, Economic Development, Personnel and

Organisation, Finance, Legal, Chief Executive's Divisions and Commercial Services. Five departments were selected for study where concentrations of employees on the lowest grades are to be found. The departments and the workplaces included in the case study were as follows:

(1) Leisure and Community Services. This department was formed by the merger of Library Services, Museums and Arts, and Recreation and Community Services in 1994. It employs over 1,500 permanent staff, of whom approximately two thirds are full-time and one third are part-time. Approximately 13 per cent of the workforce are from black and minority ethnic groups; 45 per cent of the full-time permanent workforce are women, but this rises to 80 per cent amongst part-timers. In addition to the permanent workforce the Department employs some 3,000 staff on a sessional or casual basis, particularly in youth, community, community leisure, adult education and clerical work. Interviews were conducted at a leisure centre and in the museum and art gallery.

(2) Social Services. This department employs over 5,000 staff, divided almost equally between staff on the old APT&C grades and manual workers. 68 per cent of the permanent staff are full-time and 32 per are part-time. Approximately one quarter of the staff are of black and minority ethnic origin and 80 per cent are women. Interviews were conducted in three homes for the elderly and a day care centre in the Adult Services Division.

(3) Transportation. This department employs approximately 1000 staff in transport policy, highway maintenance, parking policy and management, rivers and brooks, drainage and school crossing patrols. Just over 40 per cent of staff are women and approximately 20 per cent are of black and minority ethnic origin. Interviews in this department focused on customer contact officers, clerical officers, and staff responsible for car parks and school crossing patrols.

(4) Commercial Services. This department is made up of sections dealing with wholesale and retail markets; the catering direct services organisation; a cook freeze direct service organisation; welfare catering and domestic management (services provided to homes, daycare centres and nurseries); the building cleaning services divisions; the city supplies division and business services. There are approximately 900 manual and craft employees in the department overall. Interviews were conducted in the cook-freeze centre and building cleaning services.

(5) Education Services. This is the in-house contractor providing school catering and cleaning services across the local authority. It employs approximately 3,500 manual workers across the two services along with a further 50 staff at head office. The majority are women and part-time. Interviews were conducted with clerical staff in the central office and with staff in cleaning and catering services in two schools.

In each case, contact was made with a training manager who organised or facilitated the interviews with staff, their line managers and supervisors. In addition, a number of interviews were conducted at corporate level and with union representatives. In all, over one hundred interviews were conducted, concentrated in the summer of 1999. The employees' learning experiences survey was also conducted at the City Council.

#### *Rural County Authority*

The local authority covers a large area of rural England with one large main city and a number of smaller rural towns. Like many rural areas of the UK, this authority has suffered from depopulation in the countryside and unemployment among many of those people who remain.

The main town however, is also a port and is relatively prosperous. This research took place in the Social Services department and focused on services for the elderly, residential services for children and services for the disabled and learning impaired.

As with every other local authority in England there have been a number of re-organisations within social services in recent years. Sometimes these have been across the county and sometimes focusing on one department. The latter is often related to changing legislation. The `Children Act` and `the Community Care Act` had tremendous implications for the organisation of services. These in turn, have implications for training. Social services does have its own training department and training centre.

The other changes across the county have related to organisation of management and services. These changes are often, but not always driven by budget constraints. Such restructuring has an effect on working conditions and pay, and provides the context within which training issues must be considered.

Within Social Services there are differences between the areas under study. There are also regional differences. The intention of trainers in the central training department, is that staff should be qualified for the work and that appropriate work related courses should be available and in some cases, (for example lifting and handling) should be compulsory. Inevitably different priorities predominate at different times related to changing legislation and budgets. Care workers in the more remote areas may find it more difficult to access courses. Managers are key in helping staff access training. Sometimes managers are reluctant to release staff possibly because of problems of finding cover for absences.

Residential care of the elderly has enjoyed relatively high priority recently and in this local authority great emphasis has been laid on training and developing career paths which are supported through training.

Children's residential services have been reduced in recent years as the emphasis has shifted onto foster care. Those residential homes which remain try to recruit qualified care staff and to help those unqualified staff to gain qualifications

### *Borough Council*

This local authority covers a large industrial and semi industrial area in Wales. There has been widespread unemployment among local people. The proximity of a large and relatively prosperous city highlights further some of the deprivation of this area. The countryside is beautiful and hilly but this makes communications and travel a problem within the region.

This research took place in the Housing Department, the Highways Department and Social Services. In the Social Services Department the research focussed on services for the elderly, residential services for children and services for the disabled and learning impaired. In the Housing Department, local housing offices dealing with council estates and sheltered housing were researched. The departments within the transport section which were researched were road maintenance and cleansing

Changes across the local authority have related to organisation of management and services. As in every authority changes are driven to a large extent by budget constraints. This restructuring has an effect on working conditions and pay, and training issues however urgent must be considered in this context of financial stringency.

When this local authority was formed, three regions came together. They were all relatively deprived areas but there are also regional differences which means that policy from the central departments has to be interpreted differently in the various regions. The intention of policy makers in the central department, is that staff should get appropriate training for the work and that appropriate work related courses should be available and in some cases, (for example lifting and handling) should be compulsory. Different priorities may predominate in the workplace where managers have to deal with the day to day running of the service including covering absences. Workers in the more remote areas may find it more difficult to access courses and managers are key in helping staff access training.

The three departments are very varied and it is impossible to draw comparisons between them in terms of the organisation and prioritising of training. Changing legislation affects social services to a greater extent than the other two departments.

Throughout social services NVQ's have become one of the main qualification routes. The Welsh Office has suggested that 50% of social services care staff should have achieved NVQ3 by 2002.

The cleansing and road maintenance have to prioritise safety concerns dealing with hazardous materials and dangerous machinery. The Housing Department has undergone changes in management structures, which have had a large impact on training needs. Multi-skilling has been a priority.

#### *London Community Health Trust*

At the beginning of the period of research, this community health trust covered three boroughs in the south of London, with a wide range of hospital and clinic sites throughout the area. There were four care directorates within the trust, covering child health, elderly and intermediate services, mental health, and primary and community services. There were also directorates to cover the work of human resources, planning and information, finance and medicine, making a total of eight directorates. In addition the facilities department came directly under the control of the Director of Finance. Some services such as security have been contracted out while others at the main site have remained in-house. Cleaning at some of the community sites has also gone to private contracts. At this time the trust had an overall staffing of approximately 1,400, over half of whom were nursing staff. The geographical location of the trust results in greater ethnic diversity amongst both staff and client groups than found in other parts of the country, with 27% of staff from black Caribbean and black African origin and 44% of staff white. The trust has been involved in a number of initiatives to support black staff and puts a strong emphasis on equalities training.

To date the main organisational changes have been those that resulted from the shift from institutional to community care. This new model of care has led attention to the need for new skills, more adaptability and multi-skilling, and the role of training in the overall strategy to achieve this new model of care. The Training Manager described training as a growing agenda, for which Investors in People (IIP) provides a framework, and which encourages management to consider opportunities for unskilled staff. In the past the groups of staff who are lower down the grading structure have had less access to training than the professional staff groups, yet are on the front line in terms of delivering services. It was in this context that the trusts was one of the earliest to undertake a Return to Learn course in partnership with Unison. In addition key training issues for the organisation as a whole include developing a risk management strategy, for example dealing with violence, levels of stress, lifting and back

care. Another initiative at present is around management development in the training for appraisal.

Most of the fieldwork for the project was carried out in the Elderly and Intermediate Care Directorate. Extensive interviews were conducted at two nursing homes and one hospital wing catering for the elderly mentally ill, at one community hospital and one continuing care and respite unit for the elderly. In each case a range of staff took part in the research, including managers, administrative staff, catering and cleaning staff and healthcare assistants. In addition a smaller number of interviews were conducted with staff in the facilities department at the main site of the trust, primarily cleaning and clerical staff. Each site was visited for a number of days and as many staff who were at work on those days and who were willing to be involved were invited for an interview. In addition to the individual interviews, the survey was also conducted at the trust.

During the period of the research the trust was involved in a reconfiguration process in which a number of south London community health trusts were merged to form a smaller number of new trusts. While this process has had significant implications for senior management, the immediate impact on local services has been less dramatic and has not been a major issue for the fieldwork

#### *Hospital NHS Trust*

This trust is located on the outskirts of a city in the west of England on a large site, where a hospital has existed for 250 years. As well as the main site, the trust offers services in the surrounding towns in community hospitals, health centres and GP surgeries. It has an overall staffing of 3,371, equating to a whole time equivalent of 2,157. Nursing staff account for 40% of total staffing, admin. and clerical staff 17%, ancillary staff 13% and maintenance staff just over 1% (whole time equivalent). The trust is structured into seven directorates, each headed by a General Manager and its own personnel and financial staff. In this context, the directorates have a high level of autonomy, although there is an attempt to ensure common practice through regular meetings of the personnel managers from across the trust. The directorates are general surgery, urology, pediatrics, specialist surgery (including oral surgery and eyes), facilities (including accident and emergency, and pharmacy), clinical support (including radiology, theatres, anaesthetics) and general medicine (including neurology, cardiology and oncology).

The trust is in the early stages of a huge rebuilding scheme, begun during 1998/99 with a planned completion for 2001. The main aim of the redevelopment is to bring hospital services closer together in purpose-designed buildings. As well as developments to the hospital buildings there are a range of changes aimed at improving patient services and meeting government targets. A Patient Care Development Programme has been introduced in which staff from all occupational areas are encouraged to be involved. The scheme involves staff interviewing patients about their experiences in order to identify areas in which the service can be improved.

In the area of staff development, the trust is working towards meeting government targets for all clinical care staff to have Personal Development Plans by April 2000. However, a senior personnel manager explained that the trust strategy is to ensure that development opportunities are available for any member of staff, in particular there is a concern that non-qualified staff have access to development. With this aim the trust has been involved with a number of initiatives, including being the first in the south west to enter a partnership arrangement with

Unison to provide a Return to Learn course. Such work is supported through Education and Development Services.

After discussion with the personnel staff from across the trust, it was agreed that three departments within the hospital would be included in the study: Radiology, Neurology, and the Sterilisation and Disinfectant Unit (SDU). The radiology department has a wide range of staff including qualified radiologists, qualified nurses, secretarial, reception and routine clerical staff, and the Radiography Department Assistant (RDA). In neurology, a ward was included, with a total staffing complement of approximately twenty five including qualified nurses, healthcare assistants and a new role Nursing Therapy Assistant (NTA). The SDU has a staff of 33 and is responsible for cleaning used instruments, packing the instruments and sterilising them in an autoclave. Each department was visited over a period of a week and as many staff as possible were invited to take part in an interview. In addition, staff from personnel and training functions were interviewed to gain a trust-wide perspective.

#### *Northern Community NHS Trust*

The trust was established in 1992 and is based in a northern industrial city. The trust serves a population of approximately 330,000 people. The trust is located in a region with a considerable ethnic minority community, approximately 24%. In 1998, 89.93% of staff were white and 10.67% from ethnic minorities, especially from Pakistani, black Caribbean and Indian origins.

There is a total staffing of 2,193 (September 1998). This includes over 54% nursing staff (30% qualified and 24% unqualified) and 16% administrative and clerical staff. The trust comprises eight directorates: three service (mental health services, community services and learning disabilities), and five support (finance and information, personnel and development, quality, nursing and healthcare facilities). The Community Directorate provides a wide range of services from about 30 clinics, health centres and residential and rehabilitation establishments. This is by far the largest directorate, employing over 800 staff. The Mental Health Directorate provides acute and community based services from 11 different sites, employing nearly 500 staff. The Learning Disabilities Directorate has over 60 different community based establishments, with nearly 400 staff. Each service directorate has a slightly different balance between various occupation groups; for example in Community Services there is a very high proportion of qualified nursing staff and in Learning disabilities a very high proportion of unqualified nursing staff. Staff from all directorates are involved visiting clients in their own homes. Most of the staff in the support directorates are based at the largest site, with Healthcare facilities accounting for over 300 staff.

The trust faces a number of organisational changes in the future. The development of Primary Care Groups may mean that the employment of some community staff will in the future be transferred when the groups achieve trust status. In addition national moves on the reconfiguration of mental healthcare may also bring changes whilst in Learning Disabilities there is a move towards joint commissioning with Social Services.

The trust is committed to providing opportunities for personal development to all members of staff and has a system of performance and development planning in which all staff across all of the directorates should have a meeting with their supervisor or manager to discuss their development. The process is performance driven - the discussion should cover the skills necessary to do the job effectively and the necessary training and development needs. Each directorate has a PDP co-ordinator to monitor how effectively their directorate is

implementing the process. Considerable effort had already been made within the trust to gain feedback from staff concerning their experience and views on the PDP process. A staff survey was conducted in 1997 and the Chief Executive held a series of meetings in 1998, attended by over 250, where staff were encouraged to express views on training and development. In this context where there had already been considerable staff consultation around these topics, it was agreed that a cross section of staff who had not already been involved in one of the previous exercises would be invited to take part in this research. People from a wide geographical and occupational range were therefore included: healthcare assistants, nursing auxiliaries, health visitor support workers, clerical, IT, patient transport, gardeners, maintenance, security and catering.

## **Unskilled, unqualified or just low paid? Findings from the employees' learning experiences survey**

### **Introduction**

The learning experiences survey was conducted in one local authority and one hospital trust. Four departments were chosen from each organisation for the survey on the basis of having a large proportion of 'unskilled' workers. The departments selected also provided a natural mix of age, gender, ethnicity, and hours of work to reflect the overall balance of this occupational group in the organisations.

The learning experiences survey (see Appendix 1) was designed with the intention of being used for a postal survey in order to maximise on the range of responses. The first section of the questionnaire used the same structure as that used in Helen Kennedy's (1995) study of student experiences after the Return to Learn programme to allow for data comparison. The questionnaire was piloted on a group of students on a Return to Learn programme and was modified in accordance with their responses.

A survey pack consisting of the questionnaire, a self-addressed envelope, a letter from the research team and from the institution showing its support and that of the trade unions for the project was forwarded to the eight departments. The questionnaires were colour-coded to allow the responses from individual departments to be identified and to allow feedback. The training managers from each department were enlisted to assist with their distribution to employees. Altogether 2,010 questionnaires were sent out and 323 were returned, generating a response rate of 14.6 per cent. This is a low, but not unanticipated level of response, given the occupational groups which were targeted. There was nevertheless variation between departments, for example the Transportation Department at the City Council had a response rate of 20.5 per cent.

The data from the questionnaires were coded and entered into SPSS (Statistical Package for Social Scientists) for analysis and written comments were noted. The findings are organised into five sections. The first section discusses the research methodology and the problem of a relatively low response rate. Secondly, the types of jobs that respondents do and how hours of work, pay and ascriptive characteristics such as class, gender, race and age intersect with each other are examined. Thirdly, access to formal learning opportunities in the workplace, in terms of training undertaken, the extent to which training and development needs are discussed with managers and supervisors, and employees' awareness of learning opportunities in the workplace are explored. In the fourth section findings are set against employees' own aspirations and perceived barriers to learning. Finally, some analytical themes from the data are drawn out to identify a number of key issues which are relevant to managers and trade unionists alike who are interested in promoting the workplace learning agenda.

### **What are unskilled jobs and who does them?**

At the City Council and the Healthcare Trust, the questionnaire was distributed to four departments in each institution. The largest occupational groupings were care assistants (22.3 per cent), clerical and administrative officers (21.4 per cent), crossing wardens (17.3 per cent), cleaners (8.8 per cent). The sample also included in smaller numbers: healthcare assistants, auxiliary nurses, laboratory assistants, librarians, classroom assistants, dinner supervisors, site supervisors, reprographics assistants, play leaders, finance assistants, catering assistants, street cleaners and customer contact officers. Although it might be questioned whether all of these

jobs are unskilled (and one respondent did question why she had been included in the survey), 56.7 per cent of those responding to the question about their grade reported being on the lowest two job grades and 89.7 per cent on the lowest four grades of the local government and health service salary structures.

Class, gender, age, race and disability are characteristics which may be associated with labour market disadvantage compared to skilled and professional workers. If educational attainment is taken as a proxy for class, a number of interesting features emerge. Two thirds of respondents reported leaving school by the age of 16, and nearly 40 per cent by the age of 15. When changes in the school leaving age are controlled for (the age of compulsory schooling was increased from 15 to 16 in September 1972) it is interesting to note that an identical proportion (56 per cent) left school at the minimum age in both age groups (ie the under 42 age group who were affected by the increase and the over 42s for whom 15 was the minimum age). Perhaps more interestingly, overall 8.3 per cent of the sample reported leaving school when they were younger than 15 - in other words, before the official school leaving age. Giving the limited response from the survey and the possibility that literacy problems may in part account for this, these figures may *understate* the extent of school leaving before the end of compulsory schooling.

To what extent is working in a job on a low salary grade also associated with an absence of formal qualification? In response to a question about qualifications over one third reported having none; over 40 per cent reported having school leaving qualifications such as RSA, CSE, 'O' level and GCSE; 7.8 per cent A/AS level, 5 per cent degrees and 6.1 per cent with other qualifications. When this is compared with qualifications required for the job, the workforce appears to be overqualified in relation to job entry requirements.

Over 60 per cent of respondents reported that no qualifications had been required for their jobs; 11.3 per cent required school leaving qualifications; and 27 per cent another qualification. Amongst those reporting that no qualifications were required for their jobs, nearly half 49.1 per cent had no qualifications, and 50.9 per cent had qualifications even though the job did not require any<sup>2</sup>. Among these were people with school leaving qualifications (32 per cent) and 15 per cent had other qualifications including A/AS levels and university degrees<sup>3</sup>. This would appear to support the view that a proportion of individuals may find themselves jobs which are on the lowest salary grades for reasons other than their academic attainments.

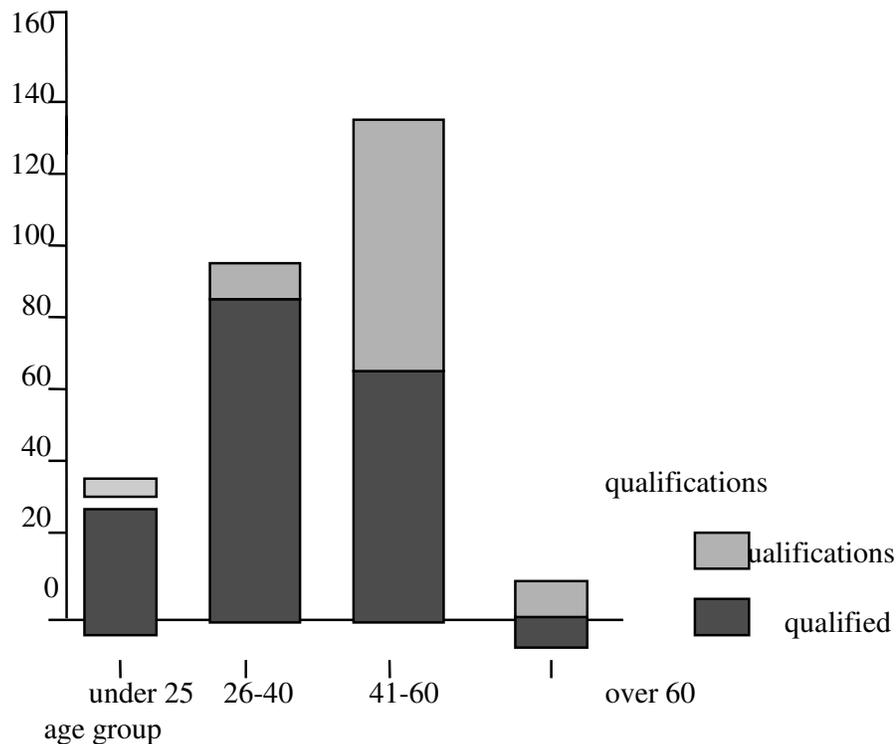
Gender, age and race interact in complex ways in defining labour market disadvantage. Not surprisingly, the oldest age groups reported the lowest level of formal qualification: nearly 60 per cent of the over 60 age group reported having no qualifications, compared to just over 50 per cent of the 41-60 year olds. This falls to 12.5 per cent in the 26-40 age group and 7.7 per cent in the under 25s. Thus, the older you are the more likely you are to have no qualifications (see figure 1).

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<sup>2</sup> This compares to the 32 per cent, a much lower proportion, of Skills Survey respondents who reported that their current job required no qualifications on entry, which is to be expected from a representative sample of occupations (Ashton et al., 1999:63).

<sup>3</sup> This pattern was also found amongst Skills Survey respondents: only one fifth had no qualifications. This leads Ashton et al., to argue that the overall supply of qualifications outstrips demand and that this is consistent with a view that skills deficiencies may be attributable to low levels of demand (1999:63).

**Figure 1**



This compares with 85 per cent of the over 60s reporting no qualifications required for their current employment compared to 60 per cent of over the 41-60 year olds, but 50 and 47 per cent for the two younger age groups respectively. These findings challenge some of the central assumptions about the changing nature of work and employers' demand for educated labour. (We would expect to find older workers with a lower level of qualification in jobs which required no formal qualifications and that younger workers, who, by and large have had a longer period of formal education and have achieved higher levels of qualification, to be in jobs which also require higher entry requirements. What we have found is that both older and younger workers have more formal qualifications than those required by the job, but the divergence is much greater amongst younger workers. This would suggest that changes in the nature of labour supply are outpacing changes in employer demand).

There may, of course, be other factors behind these patterns, reflecting the age, gender and contractual composition of particular segments of the workforce. Overall 29.1 per cent of respondents were men and 70.9 per cent women but when age and gender are controlled for, some interesting patterns emerge. Amongst the youngest age group, there is a 40:60 gender ratio but in the 26-40 age group men form just over a quarter (27.7%) and women just under three quarters (72.3%) of the cohort. The proportion of women increases to over three quarters (76.1%) of the 41-60 age group, but this imbalance is redressed in the over 60 age group, where men constitute 53.3 per cent and women make up 46.7 of the cohort. There are a number of possible explanations of these changing patterns: the impact of equal opportunities policies affecting recruitment amongst younger age groups. As far as the middle age bands are concerned, it could be hypothesised that at this stage of their careers men in these occupations are moving into work deemed more skilled or into supervisory roles. This coincides with women's breaks in their job histories for childrearing, often followed by

downward occupational mobility as they take part-time work to fit in with childcare responsibilities. The greater representation of men in the oldest age group reflects women's earlier age of retirement of 60. Though 65 is the normal retirement age for men, 15 respondents are aged 65 or more, including five who are over 70. Therefore jobs which are classified as unskilled are typically held by young people, both male and female; a disproportionate number of women in the 26-60 age groups; and men over the age of 60.

Part-time hours are typically associated with women's work, usually on the lowest pay grades (Beechey and Perkins, 1987). Overall, 56.5 per cent of our sample work part-time and predictably, this is distributed unevenly between the sexes. Nearly two thirds (60.4%) of women work part-time, with a further 4.4% per cent job-sharing (see Tables 1 and 2).

**Table 1: Time Employed by Gender**

Time Employed	Male	Female
Full time	60 (63.2%)	80 (35.2%)
Part time	33 (34.7%)	137 (60.4%)
Job share	2 (2.1%)	10 (4.4%)

**Table 2: Time Employed by Age Groups**

Time Employed	Under 25	26-40	41-60	Over 60
Full time	18 (69.2%)	56 (55.4%)	61 (38.6%)	4 (13.3%)
Part time	7 (26.9%)	41 (40.6%)	91 (57.6%)	26 (86.7%)
Job Share	1 (3.8%)	4 (4.0%)	6 (3.8%)	0

However, nearly a quarter 21.50% of the part-time workers are men but they are clustered in the older age groups. Nearly 90 per cent of the over 60s work part-time hours and some worked very short hours, with one respondent reporting working 2 hours 5 minutes precisely a week. Part-time, male employment is a feature of particular occupations which recruit retired workers. These older workers were concentrated in the Transportation Department in the City Council and were primarily crossing wardens.

In studies of labour market segregation, race is a major factor contributing to disadvantage. In the City Council and the Healthcare Trust over 79.4 per cent of respondents were white, 3.8 per cent Irish, 2.2 per cent black African, 6.3 per cent black Caribbean, 5.6 per cent Indian and Pakistani, with 2.8 per cent falling into the categories 'other black' and 'other'. At this stage we have not been able to check the extent to which this reflects the overall composition of the workforce in these grades against personnel records. However, it is interesting to note that amongst the eighteen respondents who left school under the age of fifteen, nearly half (8) classified themselves as Irish, black African or black Caribbean. From the data, it is impossible to tell if this is because they failed to attend school until the age of compulsory leaving in Britain or whether it reflects a different school leaving age elsewhere. Moreover,

the proportions of very early leavers were distributed equally between the sexes, so the cultural and social reasons for this could be quite different.

Disability is a further factor associated with labour market inequality and 5.9 per cent of the respondents reported having a disability. Their disabilities included learning difficulties, a heart transplant, club feet, epilepsy, registered blind, arthritis, asthma and hearing loss. The very small numbers involved make it difficult to analyse this in any depth, but it is likely that if learning difficulties are more widespread in the workforce in these grades in general, this may be reflected in the poor response rate to the questionnaire.

We have already discussed the extent to which employees are concentrated in the lowest pay bands in their respective salary structures. What we had not been aware of before conducting the survey was the extent of multiple job-holding. Short hours of work, combined with a low income could result in individuals seeking an additional job in order to increase income. In fact, 14.8 per cent of the sample reported holding more than one job; two respondents held three and one had four. Whilst 13 per cent of those holding two jobs had jobs which could also be classified as on a low grade, the sample also uncovered two social workers, a supply teacher, a peripatetic music teacher, a clerk to governors and car bench trimmer. In this instance, the job with the City Council or the Healthcare Trust might have represented a second job to maintain income levels, given the nature of the employment contract or variability of hours worked. A further three respondents were engaged in voluntary work.

When hours of work in this employment together with second jobs and salary grade are translated into pay, we find that 24.6 per cent of respondents have an annual income of between £1,000 and £5,000; 35.1 per cent between £5,000 and £10,000; and overall 85.3 per cent of the sample earned less than £15,000 per annum. If we examine the relationship between pay and age, we find that 3.9 per cent of under 25s have an annual gross income of less than £5,000; this is also true of 17.1 per cent of the 26-40 age group; 59.2 per cent of the 41-60 age group and 19.7 per cent of the over 60s. The reasons for working for such low gross incomes may vary according to age and may not necessarily indicate similar problems in accessing learning opportunities and potential job mobility. For example, amongst the under 25s part-time work may be associated either with childcare responsibilities or with full-time or part-time study. For those who are studying, a period working part-time in an unskilled job at an early age will not affect later job mobility. In contrast, for other younger and older women, part-time unskilled work may lead to few opportunities for career progression and the workplace is potentially much more significant as a channel through which learning opportunities are accessed. Less than full-time hours of work, accompanied by low pay are defining characteristics of these workers.

### **Access to formal learning opportunities in the workplace and outside**

When recruiting new members of staff, qualification requirements are one of the most powerful indicators available to employers to indicate the skill demands of particular jobs and to signal to employees whether there are job progression opportunities. We have already discussed the qualifications required for the job in the section above and in this section we turn to a range of different learning experiences in the workplace. These are significant in a number of ways: if young workers have access to structured training, their initial disadvantage may be counterbalanced as they acquire more skills. As far as older workers are concerned, they may have limited expectations of workplace learning, which may be reinforced by the attitudes of their peers and supervisors at work. In this section, we examine employees'

experiences of learning opportunities at work. There were much lower responses to the questions in this section of the survey, which suggests that to many respondents the questions may not have been relevant or that they may not have been familiar with the terminology used.

In this section of the questionnaire, questions were asked about particular types of training and whether it had been undertaken on the respondent's own initiative or on the initiative of others. With respect to training at work, 50 per cent of respondents answered the question on on-the-job training and more than 95 per cent of these said that they had receiving on-the-job training. This included First Aid, NVQ, Autocad (though this is probably the car bench trimmer reporting training received in his other occupation), HNC, City and Guilds, book-keeping, finance CLAIT, social work and the category 'other'. Interestingly, amongst those who responded to the question on who had provided the initiative for this, over 40 per cent said it had been on their own initiative. A similar proportion answered the question on whether they had been on a course and amongst these, over 90 per cent of them had. These included health and safety, child protection, TOPS, HND, First Aid, British Sign Language, BTEC, RSA, information technology, City and Guilds, counselling, typing and the category 'other'. Again over 50 per cent reported doing this on their own initiative.

Outside on job-related and work-related courses, 26.9 per cent of the sample reported attending a course leading to a qualification, including PGCE, information technology, NNEB, 'A' level, HNC, BTEC National, a degree, RSA, NVQ and the category 'other'. Four per cent of the sample reported attending trade union education courses; 28.5 per cent health and safety; 4 per cent courses for recreation and leisure; 3.7 per cent an access course. Eighteen per cent said that their families had encouraged them to learn, 27.6 per cent their employer, 1 per cent their trade union and 8 per cent someone else. Fourteen of those surveyed had undertaken a Return to Learn course and forty a communications skills course.

From the evidence provided here, the workplace is clearly an important source of access to on-the-job training and to formal courses. Nevertheless, it is interesting to note that a high proportion of those reporting undertaking these formal learning opportunities at work claimed to have done so on their own initiative. For learning both inside and outside the workplace, encouragement from the family and the employer are clearly very important, as well as encouragement from other sources.

Many organisations now require supervisors and line managers to discuss employees' training and development needs at work, though the extent to which this is integral or separate from performance assessment may influence its effectiveness (Hansen, f/c). Over half the sample reported discussing their training and development needs with their supervisors and 44 per cent reported being aware of education and training opportunities in the workplace. Some respondents made positive comments on these interactions, for example, that literature or a magazine was distributed, that these issues were addressed in appraisal or supervisory sessions, whilst others listed the courses they were undertaking, including NVQs and day release courses. Other individuals commented that managers were not interested in them, that the answer was always 'no' if the course did not relate to the work in hand and that it was discouraging when courses were refused or cancelled.

Although the reported findings do not suggest a strong role for the trade union as a source of encouragement to learn, there is an association between trade union membership and involvement in particular types of learning activity. Amongst the 139 respondents (43 per cent) who reported being trade union members, a slightly higher proportions (more than 50 per cent as opposed to under 50 per cent) than in the sample as a whole reported receiving on-

the-job training and having been on a course. The association was particularly high amongst those who had returned to education: six out of the eleven respondents who had undertaken an access course were union members; nine out of the fourteen who had undertaken a Return to Learn programme and twenty-three out of forty who had undertaken a Communications Skills Course.

### **Learning aspirations and learning undertaken**

So far we have dealt with opportunities available to employees in the workplace and activities undertaken on their own initiative outside work. In this section we turn to the employees' own aspirations in relation to learning, to their jobs and to other areas of achievement. We also highlight learning experiences which they found particularly memorable as well as barriers and incentives to learning. Again, there was a relatively low response to the questions in this section of the questionnaire, which suggests that these questions were perceived as irrelevant or used terminology which was not easily understood.

The single most important goal of learning reported by respondents was to improve their general education (49.7 per cent), followed by computer and IT awareness (10.8 per cent). However, this must be set against the 48.3 per cent who did not respond to the question and a further 6.6 per cent who said they had no desired learning achievements. Amongst the remainder who did respond, there were a diverse range of objectives, including increasing self-esteem, speaking foreign languages, keeping pace with developments, improving reading, doing sign language, First Aid and 'other' (20.8 per cent all together). However 3.5 per cent were more ambitious, with two respondents wanting to achieve 'A' levels, seven wanting degrees and one a post-graduate qualification. There was some variation by age: relatively few of the over 60s responded to these questions and an interest in IT was greatest amongst the over 40s who would not have encountered it in their own school-based education.

As far as ambitions concerning work were concerned, 44.3 per cent of the sample did not respond and a further 3.9 per cent reported having none. The work-related motivations ranged from getting promotion (28.9 per cent), staying employed (4.4 per cent) doing one's job better (28.9 per cent) and satisfaction (7.2 per cent). Two respondents wanted to get a full-time post, three wanted to keep up-to-date and the remaining respondents were in the 'other' category.

Desired achievements outside work included enjoyment, relaxation, physical fitness and to become a leader. This must be set against the fact that nearly 80 per cent of the sample failed to respond to this question and a further 2.5 per cent said they had no desired achievements in this area. An open-ended question about other desired achievements in life spontaneously evoked 'happiness' as a response from 23 respondents. Success, having a baby, self-fulfilment, travel, fitness and health were reported by a further 22.5 per cent of the sample, whilst only 4.1 per cent gave money as a desired achievement. However 69.7 per cent did not respond to this question.

The questionnaire also asked about memorable learning experiences, both in the workplace and in general. Again, a high proportion (57.6 per cent) of the sample failed to respond and a further 11.7 per cent reported no memorable learning experiences. Amongst those reporting positive experiences at work, examples given included using new equipment, working with special needs children, on the job experiences with children, doing courses (BTEC and First Aid were mentioned specifically), learning teamwork skills and going on a residential course. It is worth noting that these include both formal off-the-job courses as well as learning experiences which are acquired on-the-job and derive from the work environment itself. Unfortunately, nearly two thirds of the sample either did not answer the question or reported

no memorable learning experiences outside work. Amongst the positive experiences were outward bound courses, family related life experience, computing, first success at night school, do-it-yourself and trade union college (a total of 8.7 per cent) but studying for qualifications (31 per cent) outweighs all other experiences and reinforces the fact that people's aspirations to learn are high.

There were a number of very positive comments about opportunities for formal and informal learning at work.

'I previously worked in business and there were no training opportunities. Now with the City Council there are many opportunities which increase my own sense of value and worth to the employer.'

'The Council will help you achieve any qualification you wish - within reason.'

'I enjoyed six months in charge between caretakers - I think I did well and I think others did so too.'

Finally, we asked about perceived barriers to learning (see Table 3).

**Table 3: Barriers to Learning**

Number of Barriers	Frequency	Valid Percent
0	66	31.6
1	37	17.7
2	35	16.7
3	71	34.0
Missing data	114	
Total	323	

Over 60 per cent of the sample responded to these questions. Of those responding 31.6 per cent reported no barriers; 17.7 per cent reported one barrier; 16.7 per cent two and an overwhelming 34 per cent three. Cost was reported as a barrier by one third of respondents but a third said that it was not. Time was reported as a barrier to learning by just over one third but just under one third said it was not. Respondents were asked whether encouragement was a factor creating barriers to learning: 31.4 per cent said it was but 68.6 per cent said it was not. This suggests that although about a third of the sample experience no barriers to learning, the remainder who were sufficiently motivated to answer these questions often experience multiple barriers to learning: of time, money and motivation.

These issues surrounding barriers to learning can be explored further through responses to the open-ended question at the end of the questionnaire. A number of respondents reported factors which had discouraged them from learning. These included:

'The school shows no interest in manual staff and trains only the teaching staff.'

'There is didactic style of training and out-of-date computer systems.'

'We are told nothing about courses so have no chance to enhance our learning.'

'After six years I have only just been informed that there is a policy to train people. So far, I've had twenty minutes on my first evening!'

'Training given at work is always on the "cheap" and done only to benefit the employer.'

'Not many women progress beyond clerical tasks.'

'Because I left school without qualifications, it is assumed that you have no training and no wish to learn anything.'

'The trust doesn't always recognise achievements of staff who have taken courses. Therefore they lose very good staff who look for better rewards financially and job satisfaction.'

'The Assessors' Award I took I believed would lead to higher status or improved pay/conditions, but the hierarchy implemented short-term contracts so that when the task was completed you would revert to the original position.... I will not be taking part in any other work-related training within the department unless I am forced to do so.'

'In Home Care I feel that, as we cannot do NVQs and not being able to have "taster days" with other departments, it is totally negative. WE HAVE NO WAY TO GO FORWARD without learning. "Investors in People" is just false unless you are in management.'

'I have brought up a family of 7. All are employed and the youngest is at university doing a law degree. I feel I have had my working life decided for me!'

(From a 70 year old) 'Age is barrier. I did one course, but everyone else was young and I felt out of place.'

A number of respondents commented on multiple barriers to learning:

'I want to take BTEC or an NVQ but can't get time off. The only way would be to give up work which as a single parent supporting three children is impossible.'

'As a single parent of teenage children, there is little time or money for education. What I've achieved in education I did while unemployed and so only paid admin charges.'

'I don't seem to have enough time for work and study. There isn't enough encouragement to train from management.'

'When I wanted to return to work (after children) I found I would have to give up my small job and income to train for nothing. I didn't have the opportunity to learn and earn. I feel I'm now too old to go into a career.'

'As a catering assistant there isn't a great deal of time or money for me to take courses for my benefit. I feel alone with the problem and a bit discouraged. Management needs to inform all staff of training opportunities not just those on main sites.'

Nevertheless, a number of respondents reported very positive attitudes to learning and commented on ways in which access could be improved.

'Self-motivation is important to self-improvement.'

'Qualifications give you a choice. When I left school you got a job not a career. After various jobs, children and a divorce, I went to college to retrain. This gave me more confidence.'

One reported completing a part-time M.Sc and two others expressed an interest in distance learning degrees.

'As domestics we are limited to courses which are suitable for us. Before, I worked in a restaurant at a social services training centre. A sign language course would have been beneficial there.'

'There should be an annual check on training to pressurise those in charge. Senior staff at the school appear to have plenty of time to attend courses. The lower down you are the less you get and at the bottom you get none.'

'More information should be available to encourage people to recognise their full potential.'

'More apprenticeship schemes are needed because school is only the beginning.'

'Everyone should have the chance to progress inside and outside the working environment.'

'I'd like to learn about computers for my own interest - though I haven't much confidence in myself.'

'We are not all given the chance to do courses. I have a strong desire to do a communications skills course.'

'Due to chronic health problems as a child I never achieved much at school. I have since developed my skills at work and trade union college.'

'Glad I did the NVQ. It was interesting, stimulating and challenging.'

'It would be lovely to find a course which (a) I could afford and (b) which dealt with Psychology and Sociology as both these caught my attention and interest while doing an in-service course on "social care". Counselling also interests me.'

'I am very pleased with the help and encouragement I've received during my employment with Social Services.'

'You can never learn too much; even at my age I'm still willing to have a go.'

'Having worked for 5 years as a school technician (food tech and art & design) I would like to be classed as qualified, perhaps by workplace assessment.'

From these findings it is clear that although a minority of workers in these occupations (51.7 per cent) express learning aspirations, those that do have a wide range of ambitions and experience different types of barriers to achieving their ambitions. The relationship between learning aspirations, age of leaving school and initial educational qualifications will be explored in another paper. Nevertheless, one feature that is quite striking, is the fact that very early school leaving is not necessarily barrier to learning later in life. Amongst those who left school before the official school leaving age of 15, sixty per cent still have no qualifications, but 40 per cent have subsequently achieved some.

### **Conclusion**

The Employees' Learning Experiences survey shows that workers in unskilled jobs are a heterogeneous group. Overall, compared to the labour force as a whole (as in the more representative sample in the Skills Survey - see notes i) and ii) they have lower levels of educational qualifications and lower levels of qualification are required for the jobs they do. More than half left school at the minimum school leaving age and a minority reported leaving school before the official school leaving age. Despite this, a small number amongst them hold higher level qualifications and degrees. This must be set against the low response rate to the survey: those who responded to the questionnaire may be more interested in learning and more qualified than those that did not. Employees with literacy problems are least likely to respond to the questionnaire.

In the introduction we indicated that there are two separate questions: the nature of work which is considered unskilled and the characteristics of employees who occupy these jobs. These jobs are unskilled in relation to other jobs in the hierarchy of occupations and the workers who perform them do not have formally recognised skills, although they do have tacit skills (and we will be exploring these through the qualitative data generated by the research project). The status of the job as unskilled is therefore significant to employees' and managers' expectations of the availability of formal learning opportunities in the workplace and employees' interest in pursuing them. Insofar as there are often no formal entry requirements for these jobs, they are unqualified. However, the survey findings demonstrate that employees have more qualifications, and in a minority of cases considerably higher qualifications, than those required for the job. For a proportion of these employees, their lack of qualifications or recent formal learning experiences may affect their confidence and willingness to engage in learning linked to changes in the work environment. Nevertheless, a substantial minority do have learning aspirations. In contrast, the characteristic all respondents share is the fact that they are on the lowest pay grades and, even taking into account multiple job-holding, most have low incomes which will affect their ability to access formal learning opportunities outside the workplace.

The workplace is a significant source for accessing learning opportunities: both through informal learning on the job which some respondents reported and formal learning opportunities. Nevertheless, they reported considerable variation in access to information

about learning opportunities in the workplace and in the extent to which training and development issues are discussed constructively with supervisors. Although the majority reported having no learning aspirations, the motivations of those that do have them are predominantly linked to work or to improving general education. Amongst this group, there are some who are self-motivated, enjoy the support of their families and perceive no barriers to learning. This is evident in the numbers reporting positive experiences at work and in learning outcomes. However, the majority who have learning ambitions report one or more barriers to learning which include time, cost and encouragement. Some of these barriers derive from the nature of the work that they do. They can be overcome by employers and trade unions working together to find creative solutions to the problems of combining work and study that individuals on their own find difficult to resolve. This broader framework is also necessary to overcome the isolation that some employees feel. Even in a large workforce, as in the City Council, there are employees who are in small workplaces, or who are shift or night workers. Moreover, older workers may have particular needs because their experiences of formal education are in the more distant past and their lack of ease when in classes of younger people.

Finally, the low response rate to the survey underlines the weakness of written forms of communication in relation to an occupational group of this nature. It is impossible to tell whether low levels of literacy are behind the poor response rate or the extent to which 'learning experiences' were seen as irrelevant because of job and personal expectations. This would indicate that direct forms of communication, combined with advocacy and encouragement from others within the immediate work group are central to creating an environment which is more supportive towards learning.

## **Upskilling, deskilling, work intensification and routine work: changes to the nature of work**

### **Introduction**

There have been considerable discussions over recent years concerning conflicting predictions and interpretations of generalised trends in the labour market towards either reskilling or deskilling. Gallie et al. have summarised the debate, identifying an optimistic view in which computer technologies 'would transform the traditional character of manual work by upskilling the work task' (1998:3). In contrast the pessimistic view sees such technologies as removing worker autonomy, making work less skilled and giving fewer opportunities for self-development. The evidence on the transformations affecting unskilled work points in a number of different directions. On the basis of survey material Gallie has suggested that while the employer response to competition has been upskilling and job enrichment, there are fewer opportunities open to semi-skilled and unskilled workers (1996). However, Gallie also notes that upskilling has ambiguous implications for workers' experience of work - while there may be some improvements to work, upskilling is also associated with work intensification (1996:156). This theme is developed by Waddington and Whitston who argue that work intensification lies at the core of workplace relations rather than empowerment (1996). McLaughlin also points out that while many unskilled manufacturing jobs have disappeared through restructuring and new technologies, there are nevertheless many jobs in the service sector where the demand for skills will continue to be low and where some employers may be actively deskilling segments of their workforce (1985). Meanwhile national policy debates have often assumed that the answers to achieving organisational competitiveness or efficiency lie in widening the skill base of workers. The 'problem' has been seen as one of skill shortage, and the answer more training. The objective of this section of the report is firstly to investigate the nature of changes to lower grade manual work and routine clerical work in the public sector focussing on changing skill requirements, and secondly to examine how changes to work organisation create opportunities or barriers for learning and development.

It should firstly be noted that the concept of skill is deeply problematic. If it is accepted that skill definitions have traditionally been socially defined, reflecting not only competencies involved in work tasks, but also status and control over the labour process, examining changes to skill levels becomes particularly problematic. Indeed one of the first methodological issues facing the research team during the fieldwork was the unacceptability of the term 'unskilled' in relation to any groups of workers. Most of the jobs covered in this research would in the past have been classed as unskilled, although obviously they have always involved an enormous range of abilities, knowledge and 'know how'. In recognition of these issues, the approach in the research has been to ask managers, workers and trade union officers how they would describe the changes to work tasks, changes to levels of responsibility and how they perceive skill requirements to be changing.

### **Upskilling and job expansion**

The study of work design has primarily focused on the manufacturing sector and developed within management literature seeking a remedy to the alienation and the resultant absenteeism and poor performance found in much routinised work designed along Taylorist principles. In this context, it is necessary to distinguish between concepts such as job enrichment, job enlargement, intensification and upskilling. Buchanan (1994) describes job rotation as an early antidote to scientific management methods, involving no change to job content or methods. Job enlargement was used to describe the process of putting back together some of the tasks separated through scientific management techniques. This is contrasted with more complex

attempts at job enrichment such as vertical loading outlined by Herzberg which involves, 'increasing accountability and discretion, giving employees complete or natural units of work and additional authority, providing direct feedback on performance, introducing new and more difficult tasks' (Buchanan,1994:98).

These definitions are based on an assumption of management direction, whereas we found that such changes may be initiated by staff themselves, either formally or informally. The aim here is to apply some of these concepts to public sector employment, and mainly service work rather than production work. Furthermore, we are suggesting that work design has important implications for workplace learning and workers' attitudes to opportunities for learning. We are using broader definitions in which job enlargement involves additional tasks of a similar level of competence and may or may not be associated with intensification of work; job enrichment involves changes to the nature of the job which the worker perceives as more interesting/rewarding; upskilling involves the addition of more difficult technical tasks alongside greater status and work autonomy. In their study Waddington and Whitston (1996) describe a marked growth of task flexibility in the public sector, especially in the NHS role of healthcare assistant. Yet the implication of our argument is that this could be an indication of work intensification or job enrichment depending on the particular context of that work.

There were in the research a number of significant examples of job enlargement and enrichment, particularly in the Healthcare Assistant (HCA) role. There were also cases of new routes of job progression crossing job boundaries which have traditionally been major barriers. A particularly interesting example of what could be described as job enrichment was at General Hospital where assistant or helper roles were being developed to include aspects of professional work. In the radiology department, the qualified radiographers had traditionally been assisted by 'helpers', back room staff with almost no patient contact, who carried out technical support mainly on the development of x-rays. As new technology has to a large extent removed this function, there has a move to develop the role of the assistant rather than remove it. The new Radiographic Assistant (RA) role is focused on patient contact, explaining to the patient or relatives what is happening, reassuring them if necessary, in some areas dealing with telephone appointments and assisting radiologists, radiographers and nurses. In the job description essential attributes include 'effective communication skills' and 'empathetic and professional manner'. While some staff have come into the job since the role has been developed, some have worked here for many years and have had to move from the old dark room role, yet all commented on the patient contact aspects of the work as being most rewarding. RAs may be asked to assist with biopsy in ultrasound or the CT Department and this was one of the grayer areas, some assistants expressing concern about being involved in this level of work. The National Vocational Qualification (NVQ) programme is the main training route for RAs who can follow NVQ Level 3 in Care. There are moves to develop a specific NVQ for Radiography which would cover some more specialist areas such as cleaning and maintaining radiography equipment.

There are still no direct career paths from being a RA to the qualified role which requires a degree, although one young woman who already had an A Level in biology was planning to use NVQ Level 3 to gain entry to university. However, most people did regard the job as becoming more interesting but felt some unease about the additional responsibilities that they were taking on. The trust was investigating the possibility of a new pay structure which could recognise qualifications amongst this level of staff which was in part an acknowledgment that while work may be more interesting, as people take on additional responsibilities they also may feel exploited.

Another example from the same hospital is that of the new role of Nursing Therapy Assistants (NTA) being developed in Neurology as a pilot scheme. The ward is staffed by a team made up of qualified nurses and HCAs. Occupational Therapists and Physiotherapists, who work Monday to Friday, come to the ward to treat patients. The new NTA combines the three roles of HCA, Occupational Therapy helper and Physiotherapy helper, a horizontal expansion of the role - it could be seen as job enlargement and/or job enrichment. The NTA can continue therapy work after the qualified member of staff has gone and during the evenings and weekends. Management stressed that this involved an expansion of the therapy side, but not taking on work traditionally done by qualified nurses. Two people were appointed to the new NTA role and they completed five NVQ Level 3 units in therapy areas. One of these is completing further units to gain Level 3 in Care and was considering entering nurse training. There was however, some frustration that Level 3 was only an entry qualification and does not allow for any exemptions in nurse training. Again some staff expressed the view that the more training they do, the more work they take on without adequate financial recognition. The other problem in this pilot exercise was that as time and resources were devoted to two members of staff, the other HCAs felt that their training and development was being neglected. When staff had been recruited as HCAs they had been told that they would have opportunity to complete NVQ Level 2 in Care, but because of a shortage of assessors and no study time, this had not been possible (cf. Fearfull 1997). The HCAs felt that the NTAs were being trained at their expense. Completing NVQ Level 2 would mean a more money, a transferable qualification and enormously raised status, which is publicly reflected in the different colour uniforms that NVQ qualified staff get to wear. In this case the failure to deliver NVQ training was resulting in severe staff disaffection.

The attitude of other groups of workers and their trade unions is of considerable significance in contexts in which the job roles of lower skilled operatives are being extended (cf. Cockburn 1983; Rainbird 1988). Although the attitude of nurses varied enormously in the fieldwork, it appeared that it was this divide between qualified and unqualified nurses that was the most sensitive to encroachment. At Northern Community Trust a senior manager described the difficulty of recruiting qualified nurses, and the void created by the removal of the old enrolled nurse grade (SEN). She described the trust as increasingly relying on support workers who needed to be better trained but in a context in which they had to 'cut across professional divisions', where no one wants to part with skills at the bottom range of their job. This trust is linking into a national government scheme which provides secondment for staff to enter the three year nurse training. The Government will fund 80% of the trainee's salary and the trust will provide the other 20%. There will be a requirement to return to the trust to work for a period of time. Many managers felt there was potentially a tension between providing training opportunities which contribute towards the general 'greater good' and the interests of the trust or the department. In this city, care staff could earn considerably more at the local authority and there was a fear that they come to the trust to complete their NVQs and then go to social services.

The opening up of progression routes into qualified work raises a different set of issues, although these routes are not yet well established. One Nursing Auxiliary who works on the district nursing team has recently completed her NVQ Level 3, has been accepted on to the nursing course and has applied for one of the secondments to do nurse training. Having worked more than fifteen years in the private care sector, she now has two part-time jobs in district nursing, one day time job and one evening job which together make the equivalent hours of a full-time job. She has combined working this split shift pattern with looking after a family and completing her NVQ. When she started the NVQ she was given no time off work for study and at one point there were no NVQ assessors. Against all the odds, one supportive

district nurse took on a group of auxiliaries/HCAs doing the NVQ and all but one completed in about three years. The nursing auxiliary explained 'when I finished it I felt wonderful and when I was accepted for nurse training, I cried'.

A number of managers claimed that they had established career progression between domestic service and care assistant roles, although there was no specific evidence to support this. In theory it is possible for someone to move from cleaning through to becoming a qualified nurse, yet such career mobility is likely to be a reality for very few people. There is also some debate about what is appropriate training for particular staff groups. At one Community Hospital the reception staff had attended a course on communicating with various client groups, which they found extremely helpful yet it was a course primarily aimed at care staff. A domestic from a home for the elderly in the local authority felt that cleaners needed much more extensive training about how to relate to the client group and how to deal with violent clients. For these cleaners the context of their work included hazards for which they did not feel fully prepared. Similar sentiments were expressed by a wide range of staff from the health and local authority sectors, including porters, security, reception and catering staff, all of whom have considerable patient/client contact.

Changes in the nature of services, in combination with the changing characteristics of staff recruited into certain jobs have resulted, in some cases in a new mixture of tasks. In some instances, job enlargement is encouraged by management. This had been the case at the museum and art gallery where the staff had been involved in a number of initiatives to enrich their jobs. This was partly a reflection of the changing nature of the work but also a response to the recruitment of younger workers to security posts. There is now more outreach work with local communities and a greater sensitivity to the needs of the blind and partially sighted as well as access for wheelchair users. A dedicated teaching section has been created along with initiatives to catch the imagination of children: there is more 'hands on work' for school parties in the galleries, along with activities organised over the summer holidays and plans to allow children's parties to have 'sleepovers'. Ten years ago the museum assistant's job had been 90 per cent security and 10 per cent answering queries from the public. It had been an old person's job and often people were employed for a few years after they had been made redundant until they retired. As one member of staff said 'they used to be seen not heard'. In recent years, recruitment policy has changed; younger people are recruited who are more articulate and managers are aware that they have more ambition and need to keep their minds occupied rather than just 'sit on the post'. The jobs have become more oriented to front of house activities, involving greater customer contact. The image of the staff was 'softened' with a change from blue security uniforms to some which were perceived to be more user friendly. Staff undertook 'Welcome Host' training following the introduction of the new orientation towards customer service. The museum has had the Investors in People award for three years and the Chartermark award for one year, which involved getting more feedback from the public on the service provided.

There are three ways in which staff have been encouraged to learn about the work of the museum and to expand their jobs: through a greater emphasis on customer service, through acting up in preparation for promotion and through involvement in working groups which are a form of quality circle. Museum assistants often have no formal training in the content of the collections but will pick this up through the need to respond to questions from the public, or through team briefings, which include details of forthcoming exhibitions, given by the curators. There is no formal requirement in the job description to know about the exhibits, but it often makes their jobs easier if they can respond to the most commonly asked questions from the public, rather than referring them to reception or a curator. Managers recognise that

the staff do have knowledge about the paintings and exhibits, but there are limitations to the extent to which this role could be developed further because staff can not move away from their posts for security reasons. The staff themselves reported that they felt it would be nice to do more in relation to customer contact and knowledge of the collections, but finance and cover for training were an issue and that the primary responsibility was to keep the galleries open. Opportunities for job shadowing had been made available for some staff who were seeking promotion into supervisory positions, including opportunities to visit branch museums and other galleries.

In the Museum and Art Gallery there had also been a programme of employee involvement, promoted by the Investors in People process, which had resulted in a number of improvements to the service provided to the public and the identification of areas where savings could be made. The working groups had examined customer service, the service for customers with disabilities and first aid. One member of staff who was involved in the customer service working group pointed out that facilities had improved as a result of the recommendations. Whilst there had been positive feedback from the public on this, he also felt that these developments were allowing him to 'create his own job' by expanding into some aspects of maintenance work. He argued, 'I dislike the boredom, you don't have a lot to do sitting in a gallery with lots of paintings .....People these days don't want a boring job, they're more demanding. You have to do what you can to make the job more varied and interesting'.

These examples illustrate that there are real opportunities for job progression and opportunities for education and/or professional development. Where staff have had positive experiences of learning in the workplace they may have very positive attitudes towards management and the organisation and feel that training opportunities are a recognition by management of the value of staff. However, where there is a feeling of unequal access to training opportunities or a feeling of barriers to education and training staff expressed fairly negative feelings.

### **Job expansion as a negative experience**

There are instances where job enlargement and the associated training can act as a demotivator, where it is used to increase responsibilities without increasing reward. One member of a maintenance team described how he had been 'forced' to go on a training course on fire extinguishers. On returning to work he was given the responsibility of maintenance of the extinguishers throughout the trust, which he felt to be an extremely heavy responsibility, yet his wages had not been increased at all. He had more work to do, much more responsibility for no more money but could not get across to management why he was so unhappy about the situation. He said, 'training - that's for their [management's] benefit not for ours'. When asked about future courses that he might attend, he responded, 'I certainly won't go on another one as long as I live'.

An example from one of the local authorities illustrates how a potential future development - a centralised call centre for dealing with the public in related areas across departmental boundaries - has the potential to undermine some workers' job enrichment strategies whilst boosting others. This customer service officer who was dealing with complaints was developing a career strategy which he hoped would eventually allow him to move into the technical side of his department. Although he was clearly highly skilled and good humoured in dealing with members of the public who were 'going ballistic', a shift to a multi-purpose call centre would be a case of job enlargement into areas which would not support his move into technical work.

In other instances, attempts to foster a work environment supportive of training and development may be undermined by changes in other aspects of the employment relationship. In the health trusts, changes in the form of the employment contract, involving a deterioration in conditions were reducing the incentives to staff to change jobs within the organisation. Most health service trusts are moving away from the older type employment contract which allows for extra payments for evenings, weekends and holidays towards contracts in which flexible working hours are expected with no extra payments. All new staff are appointed onto the newer type contracts, but established staff see little point for training and development since any job change would move them onto new contracts and reduced wages. This was raised by the whole range of staff, from gardeners to healthcare staff.

### **Work intensification**

A cleaner who had been working in the same school for twenty-four years explained how her job had changed. She cleans for two hours daily, five days a week and has a unit made up of a corridor, a gym, changing rooms and showers, a classroom in which she has to move the desks, two rooms used by teachers, a leisure centre and also does the laundry. Since she started, the areas each cleaner has to cover have been enlarged. She pointed to a block of three class rooms, two laboratories, two cookery rooms and a classroom. It used to be done in 25 hours and it is now done by one lady in 10 hours. These reductions were made possible partly through improved techniques: they have switched from using brooms, mops and buckets to using buffing machines, spray clean and a kex mop. However, a bonus scheme was introduced at the same time as an incentive, though the cleaners lost it when the contract was let to subcontractors who kept the existing staff on. The contract has since reverted to the local authority.

The school meals service is one area where the pace of work has been speeded up. A catering manager explained how the pressure had partly come from changes in service requirements. Since the children can go out of the school at lunch time, the school meals service is in competition with local fish and chip shops. The children do not like queuing, so they introduced a cash cafeteria. In addition to the meals which are served the children can help themselves to burgers and other prepared snacks at a hot counter. This had speeded the service up. However, there were other time pressures. The head had reduced the lunch break to 40 minutes in order to finish classes earlier in the afternoon. As a result, in the main dining room they now had to serve 400 children in 40 minutes. She commented 'the way work is organised, everything has to be down to a tee, especially if we are short-staffed which we frequently are. If someone is ill I can 'phone around schools to see if someone can cover. I can give overtime, but it's pairs of hands that are needed'. Part of the problem in staffing levels lies in the short hours of staff contracts which is making recruitment increasingly difficult. Recent changes in the tax and benefit system mean that most women want to work 16 hours a week so that they can get Family Credit, but new workers (who are recruited centrally) are only offered 10 hour contracts and the hours that catering supervisors have at their disposal are calculated on the basis of income and sales in the kitchen. Some staff will combine school meals work with cleaning in order to work sufficient hours.

A general assistant in a kitchen described how she felt her job had deteriorated. When she had started work ten years previously, the job had been hard, the people were nice and 'the girls treated each other as friends'. She felt that the attitude of the employer was now 'we will get as much out of you in the shortest possible time for the same pay'. She felt there was more interest in having fancy chairs and tables in the dining area and that the attitude to staff was evident in the poor quality of overalls, which fall apart. There had been cuts in overtime and the kitchen staff never had more than fifteen minutes for their own lunch, even though they were supposed to get half an hour. She said that she liked to do her job properly, otherwise she got worked up. She felt they were skimping because there was no time and they were short staffed. Whereas she had felt pride in her job, she now felt unable to do it properly.

In some areas of work staffing levels are very low. A cleaning supervisor reported that there were supposed to be eighteen part-time staff on her site, but they were several staff short. She was supposed to work 30 hours a week and wear a suit rather than overalls, but she was not able to do this as she had to cover the cleaning work as well. Part of her role was to provide training for new members of staff - for the first five weeks she would see them frequently and check their work and would write a report on the completion of their 13 week probationary period. Despite people's perception that cleaning only involves being able to use a vacuum

and broom, health and safety has to be taught, as well as hygiene and the most effective techniques for cleaning different areas. Low levels of staffing also meant she was unable to take time off to undertake training herself. Similar problems were identified in other cleaning services. A cleaner in a home for the elderly felt the ratio of care staff to the number of clientele was very low and that some staff were off sick with stress because of the low levels of staffing. Two members of staff who had recently retired had not been replaced. She argued 'there are thousands of people desperate for jobs and they need them here. They get as much as possible from each worker .....caring has gone out of the window'. In many cleaning jobs, there is an expectation that workers will flexibly provide cover in other parts of the building or the service. She felt that the term 'flexible' in her contract had been stretched to the limit.

The intensity of work also has consequences for new employees' ability to learn from more experienced workers. A woman who combined a general assistant job in a school kitchen with another part-time job reported how she had learnt her job by watching other workers when she started. She had been put at a station and the person she had been teamed up with showed her what to do. She felt that this co-worker had been too rushed to teach because the kitchen was never fully staffed and she had experienced similar problems when starting her cleaning job.

### **Deskilling**

As argued earlier, not all the changes in work organisation currently taking place result in a demand for higher levels of skill and there can be losers and winners in regrading exercises. There were cases where staff perceived themselves to have been deskilled and as a result had lost the motivation for additional training and development. At London Community Trust, when the SEN grade of nurses was removed the existing SENs were offered the job of care assistant, with the possibility of taking a conversion course to become a fully qualified nurse. The result for those who became care assistants was that they could no longer perform many of the routine nursing activities which they had been doing for many years, for example change a dressing. Many felt demoted and degraded, 'I feel very bad, I am like a domestic, I am very cross...I don't think I will ever forgive them.....it has made my life so miserable'. The trust has a wing in one of the London hospitals and a HCA there who had previously been an enrolled nurse, described how her friends on the ward below, employed by a different trust, still had enrolled nurse status and higher pay. She described how difficult it was for her when they regularly did tasks which she was no longer allowed to do.

The sub-contracting of specific elements of jobs as a cost-saving measure can equally result in the degradation of the skill content of work. Maintenance staff from Northern Community trust described how they had previously been classed as skilled workers, as carpenters or electricians, but how work had been reorganised so that they only dealt with basic routine activities and private contractors were called in to deal with any more complicated task. As their pride and dignity in work had been removed, it was almost like an insult to them to discuss what training they might 'need', 'basically any skills I had they've taken off me'.

In a similar case a group of gardeners described how their work had changed over the years. In the past there were greenhouses and a head gardener who taught the junior staff about growing plants. Now the job is less about plants and more about machinery and routine maintenance of the grounds. As well as being deskilled, the gardeners also considered themselves to be under pressure for work intensification, as one said, 'what they're [management] trying to do is shove more work on to the few of us'. In this context any discussion of training and development was regarded with extreme suspicion, 'you can go on these courses which will benefit the trust, because then they'll have you doing these jobs - you see I'm cheap if you know what I mean - but do they give you any money?.....No!' However,

this same group of staff had been interested in joining a computer course. They claimed that they had been excluded and the course limited to the clerical staff, 'they are denying your rights to go on to improve yourself basically'.

Many workers in jobs which are relatively routine are able to extend their areas of activity into contiguous areas of work (this is discussed in more detail in the section on strategies of self-development and job enrichment) Examples of this would be a driver/care, a domestic/care or a maintenance operative/care in a daycare centre or a home. These staff will come into contact with the clients through their non-care role, but may find that they enjoy working with people and want to make more of it. The formalisation of this role allows them to develop a more professional approach to dealing with the clients, including opportunities for learning on-the-job and for attendance at formal courses. It may also create opportunities to move into a full-time care job and even career progression.

Some of the changes which have taken place in local government have undermined these informal job enrichment strategies. For example, one domestic in a care home expressed her dejection at losing her care responsibilities, as her job had been redefined as being wholly cleaning. With compulsory competitive tendering her line manager shifted from being the manager of the home to an area manager responsible for cleaning services. Not only had she lost part of the job that she enjoyed, but she was no longer able to attend courses run by the Social Services Department for care workers. She said: 'my job is boring and monotonous and there is not a great deal of satisfaction. It's a repetitive domestic job and five years ago the care part of it was taken away. The job is a drudgery. I get through it with the banter with workmates and residents. There is no development and the only perks are the days off. .... Previously, I knew more about the clients, but I'm not allowed to have the input that I had before ....the emotional side of caring, for example, comforting residents if someone's wife or husband is in hospital ....I put my mop and broom away to sit down with a client if they are crying. I'm not supposed to take them to the toilet, but I do if they are wet. I'm not supposed to, but they get verbal and resentful if you don't.'

### **Routine work**

What has become apparent during the research is that there continues to be a large number of people working in low paid, routinised and repetitive work based on scientific management techniques in the public sector. One example is that of the Sterilisation and Disinfection Unit (SDU) at Hospital Trust where the main work is to receive, sort and sterilise the appropriate trays of instruments for theater and community services. Over the last couple of years there has been a major effort to improve the operation of the department as a response to more stringent hygiene standards. The department has recently achieved ISO9002, which means they are able to service other trusts as well as their own hospital. The various work areas had been separated off, staff now wearing gowns in the sorting room, and there was some job rotation between the different tasks. The trays may vary from one or two complex instruments to those with hundreds of similar looking instruments, each of which must be examined and checked for working order. The instrumentation changes frequently, so the specific packs alter which staff have to keep learning. However, procedures for each process is detailed in the staff duties book. One member of staff described her initial reaction to the number of different instruments as 'mind boggling'.

There are no specific training programmes for staff in SDU, all training is on-the-job, although there has been a move to formalise the process through staff records. One supervisor estimated that it might take nine months to learn all the areas in the department, yet once learnt many staff found the work boring and repetitive. Most staff spoke positively about the

changes to the organisation of the department, yet the reality of work in the SDU is that there is no opportunity for career progression, except for the few to become supervisors. One man said, 'I've hit a brick wall, there's nowhere to go'. A couple of men mentioned wanting to move into a care assistant role, although a major problem was getting relevant experience.

Throughout the case study organisations there were employees who described their work as boring or monotonous. For example, a leisure assistant at a swimming pool said of lifeguarding work 'it can be a bit monotonous looking at the same bit of water all the time'. A general assistant said "“general” just about sums it up..... when I first came I was doing the same task over and over again. I couldn't motivate myself to do it, so I had to have a change'. Another general assistant said 'my supervisor asked why I was so slow and I said the work was boring'. Similarly, a maintenance operative said 'in my opinion it's a misleading title, I'm more of a handyman or labourer ...it's anything no one else wants to do'. This was echoed by some managers, for example, the catering manager who said: 'it's repetitive, boring and low skilled, in my opinion. With this type of work we can't retain people with City and Guilds qualifications because they want to go on and do more interesting work. We can't retain them and we can't offer more interesting work'. Another area of routinised clerical work is the film library in the radiography department. Here staff locate files for clients and send them to the consultants or clinics and file them again when they return. Staff use computer terminals although they do not have their own work area and also deal with telephone queries. Handling the files which contain large x-rays is physically demanding work and monotonous, although one member of staff described the atmosphere as supportive which made the work more attractive.

There were a range of reasons why people were prepared to remain in low paid, boring and repetitive work. For some the hours made it possible to work. In the SDU at Hospital Trust two women who had recently had children described how the manager had offered them flexible hours which fitted in childcare responsibilities. Another woman who had been a qualified chef worked full-time but described it as much better than the split shift she would have to work in a kitchen.

### **Concluding comments**

The findings from this research project indicate that the reality of skill change is much more complex and contradictory than suggested in much of the literature. In the case study organisations there was some evidence of upskilling and job enrichment, although this was experienced by different workers as a positive development or a negative one depending on the social context in which it was occurring. Equally there were some jobs where skills were being removed and staff described themselves as being deskilled. A range of routinised jobs continues to be in evidence. Workers' attitudes to opportunities for learning and development were particularly influenced by how they perceived their jobs to be changing and whether they could see potential opportunities for promotion or career development. Employers in all of the case study organisations were committed to providing learning opportunities for all staff, although staff identified a range of barriers to their involvement. In certain cases workers had evolved their own strategies for job expansion or career development while some people expressed a purely instrumental attitude to work claiming not to be interested in development. These issues are addressed later in the report.

## **The Professionalisation of Care Work**

### **Introduction**

Care staff working in residential homes for the elderly and care in the community represent a group of workers whose jobs are undergoing a process of professionalisation. With changes in legislation in the early 1990s the whole approach to both local authority responsibilities for care of children and for the elderly shifted in emphasis. Because of the changes in caring, underpinned by the Community Care Act, a range of new and varied demands were made of carers in residential homes for the elderly and of home carers. Supporting elderly people and the disabled in their own homes for as long as possible became the preferred strategy. This has had an effect on the number of people living in local authority homes and has meant that the nature of work has changed, both in the home care service and in residential homes. The emphasis on keeping people in their own homes means that people are frailer when they go into residential homes. Care work has been extended to include skills that used to be considered as nursing.

The corollary of this is that the home care service has also changed. It is some time since the home help service became a home care service. Now with the elderly in their own homes until they can no longer manage by themselves even with support, the home carers have also needed training in a wide range of skills. These changes were underpinned by a new attitude to residents in local authority homes. 'Choice' for clients and residents was the new philosophy. Combined with the changing skill base the work of caring has become more demanding and the concept of the professionalisation of care work has gained widespread acceptance.

### **Caring for the elderly. The views of local authority trainers.**

Training managers perceive that the impetus for changes in residential homes and homecare services have come from three sources; the legislation, the recognition by managers of the increasing breadth of the workload and from listening to the demands of carers themselves. The idea of the professional carer has emerged from these developments with new requirements for the training of staff. This has been reflected in changes in pay and conditions. A senior training officer commented, 'It was very much that care staff used to be considered manual workers; now they have come onto our pay and conditions. It is seen as a professional role now. It is a role that they can develop, become acting team leader and team leader. The philosophy behind it has changed. It's not pin money any more'.

This concept of 'the professional carer' was a recognition that the job had changed. Caring for the elderly had become a more complex task with the passing of the Community Care Act. At the heart of the legislative changes was the shift of responsibility for many of the frail elderly from the NHS into social service provision. The training implications were unexamined in the legislation, which left a skills gap by default. One trainer explained that whilst the district nurse is highly trained, it was assumed that a care assistant could do some of the same tasks without any formal training.

The changes in policy and practice had to be reflected in training. Services had to change rapidly to get abreast of the work required of them and the demand for changing skills. Care staff in homes for the elderly and carers in the community took over a considerable amount of work, which would previously have been done by trained nurses, drawing the line at medical intervention. A trainer, in one of the local authorities, expressed anxiety about the training gap for care staff. Social workers were retrained as a priority because they were seen as professionals who would implement the changes. However the care workers, who would deal

with the clients were not initially included in training. They had to take on personal care skills and they had to work with a tremendous range of people with a wide range of disabilities, but were not initially given the opportunity to have retraining.

The delay in training carers was partly due to the large number of carers involved, which made it a daunting task and yet the changing demands of the work made such re-training essential. A trainer explained 'It was basically assumed that they would pick it up or their managers could help them; that information would cascade down...I think we ask too much of people. (In the past) they were called unskilled and it was assumed that anyone could do it. And yet they need tremendous skills to be a professional carer'.

It was these concerns which drove the changes in training provision<sup>4</sup>. Within both local authorities, training for new carers now involves an induction course, working through a good practice pack and then attending other courses. The induction course is also open to long serving members of staff, where there are places. There is also training for the changing role of the carer. There has been a recognition that carers need some nursing skills. In one authority a district nurse who is a training officer, who comes and teaches basic skills 'to change catheter bags, to change colostomy bags, to put on artificial limbs. All these things carers need the skills to do'.

Training is one of the lynch pins of the changing philosophy of professional care. Access to training is therefore of vital importance. Discussion with care staff from five residential homes for the elderly revealed that access to training was well developed in three of the homes. It was rather patchy in the other two. One senior trainer was aware that there had been communication issues concerning training courses, but she hoped that these were being overcome. Both local authorities cover large rural and semi rural areas and the intentions of the central training centre may suffer communication difficulties. One trainer explained that some problems may lie with some managers who do not always pass the information on. This is becoming rarer, but in the past there had been a great disparity across the local authority in terms of information flow. Theoretically staff should have equal access and equal opportunity to do training. Any blockages in the flow of information, do raise issues of equality of opportunity across the authorities especially given the pressure towards professionalisation.

In one of the local authorities, courses have been set up for managers telling them what their responsibilities are and how to work through training packs with the staff they manage. Therefore one of the key issues in ensuring staff are well informed about training courses and get release from work to attend them concerns the role of managers in delivering centrally formulated training strategies.

### **Managers' attitudes to training and professionalism in the care of the elderly.**

The five managers of the homes were interviewed for this section of the report. Managers are of great importance in generating a positive ethos towards staff development. This ethos, in part comes out of an explicit atmosphere of valuing both staff and residents, which some managers seem to be able to generate. In some residential homes there seems to be very little

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<sup>4</sup> The bulk of the field research which is reported here was carried out in Rural County Authority and Borough Council, in five residential homes for the elderly where all the managers and forty care staff were interviewed plus twenty cleaning staff. Twenty interviews with home carers for different client groups were conducted. This section of the report also includes research material from all the other research sites where appropriate.

dissent from the philosophy of professionalisation of carers, which underpins the training agenda. As the different residential homes have different contexts and different histories, some managers have a tougher job than others to develop the ethos of professionalisation.

Partly because of the different contexts in which residential homes operate, managers have differing ideas about the importance of training for different staff groups and what kinds of training are important. There may have been a time when a wide range of staff could access a course. Across both local authorities, the training budgets are becoming more constrained. Carers continue to be targeted for training, but other groups, such as domestic staff may be a lower priority unless the training relates directly to their work. One manager explained that budget cuts had resulted in target groups being specified for courses on training lists, commenting 'It is all resource-led'.

This manager of a residential home for the elderly prefers to get as many staff as possible on training courses. The home includes a special needs unit for people with dementia and there is a commitment to training for all staff, including domestic staff and the handy person. This is because, as the manager points out, everyone contributes to the atmosphere in the home. 'I'm keen on it, very much so. Even for the handy person, I would like them all to do as much training as possible. I send them on everything I can get them on, especially disability awareness and equal opportunities courses. What is the point of trying to get an equal opportunities climate and a climate of respect and choice, if some staff have not had a chance to think through these issues? They need space outside the work place. Everybody is important in creating the right climate'.

In another residential home for frail elderly which includes a unit for severely affected Alzheimers patients, training for carers has had a different focus from other homes because the staff includes a greater number of nurses. There is potential conflict because of different kinds of training for nurses and carers. There are also issues about status and whose methods of working should prevail. Recently the manager has asked for the nurses to be included on social services training courses on the assumption that if carers and nurses are trained together, when they work together there will be less conflict. In this home, training in the care of residents with Alzheimers has been prioritised and the manager's intention is that all care staff will attend a study day on the subject over an eighteen month period.

This manager also points out that the close involvement of carers with residents means that bereavement training is an important aspect of the work. 'The bereavement training, everybody wants to do this. You can't blame them. The residents we have here come in walking but they die here. There is no discharge procedure. This is the last post. We need to induct our staff and introduce them to the idea that the residents will die here'.

Even where opportunities exist and the climate is supportive, not all staff are interested or can take advantage of training. Some carers resist going on training courses, despite the commitment to training of Social Services and the home itself. Courses are advertised on a board in the staff room and people sign up. Decisions about attending a course are made through supervision. This manager suggests that a disinclination to undertake training does not fit with the changing ethos of professionalisation. 'Previously they were just carers. Now the title is Professional Carer. To be professional they need to be inclined to do training'.

In a third home for the elderly the new manager has inherited a system where she needed to develop 'flexibility'. There had been a number of management changes in the two years prior to her appointment and this had left the staff rather wary and territorial. They had become very

rigid as a result. 'We do this on our patch and we don't do anything else. I have been trying to make people a bit more flexible'. Training could have had an important role to play in the process. Unfortunately logistical and organisational problems often intervene. Waiting lists for courses led to long delays for certain carers trying to get on the induction course. By the time some carers had got a place on the induction course they had already been in post six months or even a year. There were problems about cover in this home for the five day standard course. It is in a rather isolated rural area and there is not a large local population from which to draw staff, even if the budget were there, which usually it is not. 'The five day course is wonderful, but covering someone to take a whole week out is very difficult on our rotas'.

In this residential home, as in some other homes, there are the concerns about the care staff who do not have the confidence to go on training courses, or do not see themselves in need of training. There are the difficulties about encouraging certain long serving staff. The manager believes that where staff are daunted by the thought of training, allowing them to attend courses in pairs can provide support. This intensifies problems of cover because then two people are off the rota. 'We have to get the balance between encouragement and actually forcing them'. The reluctance of some staff to attend courses was raised frequently by trainers and managers and this issue will be discussed in the next section.

Among managers interviewed for this research, there was a commitment to training and a recognition that this was a key to self reflexive practice and a 'client centred approach'. The managers varied in the kinds of weighting they gave to different kinds of training. This may partly relate to the history and present context of the home. It may also relate to the values of the managers themselves. Only one manager mentioned equal opportunities training as being vital to the atmosphere of the home. The values and management priorities of managers themselves, also contribute to the ethos of professionalisation which policy initiatives are trying to promote.

### **Becoming Professional Carers**

The carers interviewed in this part of the fieldwork were all women who had come into care work from a range of backgrounds. A surprising number of respondents had started on nursing training but had dropped out when they had children. Going into care work was often seen as related to earlier training in nursing. Many said that they preferred caring to nursing because it was more personalised and less institutionalised. The residents were people first and not just 'cases'. Others had moved from the private care sector into local authority caring. All reported that they had made a change for the better. Pay and conditions, access to training and the experience of working with residents were said to be much superior to their experiences in the private sector.

Other carers came from a range of previous work. Some had worked in shops and factories. Some had worked as child minders. Many had been bringing up children at home until they came into care work. Some of the younger women came straight from school with a range of qualifications. Because of this wide range of backgrounds, training assumes great importance. Caring is no longer work which anyone can do, if it ever was. A range of skills are required, from lifting and handling, to dealing with dementia patients. Most carers are willing to go to training sessions. The dissenters are increasingly in the minority as the ethos of professionalism becomes established. It certainly was not the case that the majority of longer service carers resisted training. Many carers who had been in post for a number of years, had completed a wide range of training. They mentioned courses such as First Aid and Dementia which are part of upgrading caring skills, as well as newer courses such as Sexuality as well as NVQ's.

Not all carers had gained the necessary skills through training courses. Some longer serving carers had been employed before training became a priority. One carer in a large city residential home has worked in a special needs unit for eight years. She started work before induction courses were introduced. She has gradually gained qualifications although initially she gathered experience by working alongside established carers. She has just finished a week's course for older carers who had not done the initial induction training.

Three of the Residential homes had very good records of getting staff onto training courses, and most thought they were useful and appropriate. A relatively new carer explained how she had been sent away for five days on an induction course there which had covered a tremendous amount. 'You get your manual handling checked and renewed, communication, food hygiene'. This carer explained that in her residential home there always seem to be courses available.

Carers in these homes thought of themselves as professionals. One respondent summed this up. 'We are on a level with some kinds of nursing'. It does appear that the emphasis on 'professionalisation' is working. Carers from homes, which are more isolated, sometimes found it difficult to get onto courses. Residential homes in rather remote areas of local authorities are where carers have suggested that getting on courses is more a struggle because of lack of publicity. One carer explained 'I've done a couple of courses. I've been lucky to find out they are on and get on them. Not enough people know about what is going on. I think there is a lack in that respect'. This is not an isolated case and communication remains a problem. The carers point to 'luck' as being an important component of finding out about courses and of being selected to attend. Carers say they raise the issue in supervision. This point, about lack of success in relation to getting staff on courses in some areas, was raised earlier by one of the managers. She pointed out that the courses were often full before her staff could get onto the course. This manager is keen for staff to go on courses, despite problems with cover. It would appear, from the interviews, that other managers are not publicising courses effectively, so staff do not even know about courses.

Some carers have to deal with aggression in their work and carers who work with Alzheimers patients were vociferous in wanting a course on dealing with violent residents. Not many Alzheimers residents are violent, but the minority do give carers anxiety. Two new residents have recently arrived in one home. Carers have found them a challenge. 'We have got two new gentlemen in and all hell has broken loose. One is quite aggressive and if you don't answer him he thumps you. You have to be careful'. Carers have to find strategies for dealing with aggressive residents with Alzheimers. They have to negotiate even such basic aspects of caring such as the morning wash. Another carer reported being threatened by a violent resident with a heavy object. "I am going to smack you round the face with this." He said. I just walked away. Ten minutes later I said "I'd love to prop the door open with that." "Certainly" he said. If I had tried to take it from him earlier he would have hit me'. Carers do report that it is not uncommon to be 'knocked, pinched' or even...`go home with a split lip'.

A course in restraining violent residents would help them to deal more effectively with incidents that do occur and help them to feel safer generally. At the moment the Alzheimers course does not include advice about restraint. This demand for such a course is interesting from a number of perspectives. Firstly the carers continue to work with, and feel compassion for Alzheimers residents even when they have suffered some violence. Secondly, their response is a desire for more training.

### **Resistance to training**

Despite the new language of professionalisation, sometimes there was resistance from the experienced carers who did not understand why they needed to attend a course. The trainers and managers had to overcome this opposition by pointing out that it was not because they thought the carers could not do their job, but they still needed to learn about the legislation and learn new skills. A trainer gave some examples. 'Why they do it, how they do it, is there a better way of doing it? Are they within the law? Are they thinking health and safety? What is the feedback from the resident or the service user?'

Another manager suggested a threefold explanation of why staff do not always want to take advantage of opportunities which are offered. '(One Group) cannot do it because of their education. They feel threatened by the whole thing. (Another group have) family commitments. There is no backup and they find themselves restricted. And some people just don't want to do training. This is a resistive group who find it difficult to change'. Another manager explained that some of the more established staff are convinced they haven't got anything else to learn 'so why are you sending them on a course?'

Although a small minority, among older carers there were some dissenting voices about the value of training. Some said that they had worked as carers for a long time and that as they were near retirement age they did not need any more training as they pretty much knew everything that they needed to know about the work. One such person is Betty. Her views were also expressed by a few other respondents. Betty was a dissenter in the sense that she did not see training uncritically as 'a good thing'. 'I am 57 and to go back to school, well I find most of it is common sense when you get there. I always make a fuss that I don't want to go on them because I am too old. But there you go. They put your name down and you feel you have to go'. Even Betty had to admit that training had prepared her for the work such as food handling, dementia etc. When asked about specific courses, Betty could remember both useful and useless examples. 'Some of it when you go you think "What am I doing sitting here?" Some is very useful. I went on a seminar the other week all about food. It was very interesting'. Betty prefers courses that relate directly to her work, which is why she found the course on food appropriate and useful. Although Betty was ambivalent about training, it is clear from this discussion that the training she has received does underpin her work as a carer. Other carers also suggest that courses are not always useful and that much which is contained is either commonsense, or could be applied in ideal conditions, but not the conditions in which they are working.

This range of attitudes to training, may be masking a deeper issue – that of adequate supervision. The whole system of supervision may be key to encouraging staff onto courses. The level of supervision varies from one residential home to another. As well as discussing work related incidents, during supervision, training issues should also be on the agenda. Any shortfall in skills or knowledge should be addressed through supervision. In one home, sickness in the senior team has meant that some carers had not been receiving regular supervision. A few carers felt that they did not always get the support that they needed.

### **Change and the new professionalism**

The carers themselves are very aware of how the job has changed and the emphasis on the new professionalism. Many point out that the job has changed and that the client centred approach now predominates. 'Now we are more professional. It is built around the individual client'. Some staff chose to work in the local authority sector because of the strong ethos of

client choice. They value an atmosphere where everyone is treated as an individual. Carers work hard to make sure that this ethos of choice becomes a reality for the resident. 'If they like their hair done or a bath every day I do my utmost that is carried out for them'. This ethos of 'choice' also has its critics among carers who are equally committed to their work. Not all carers agree that 'choice' should or does underpin all aspects of the work. Some point out that choice may well be limited in reality and there are other aspects to consider such as personal hygiene and reactions of the family if the standards of hygiene fall. 'I think it is talked about a lot, but really there is a limit to choices. I have some clients who would never have a bath, but you can't just leave them dirty. Their family would complain, so you have to give strong encouragement. I think we talk a lot about choice, but whether things have changed that much, well I am not sure'.

Other carers intimate that choice may have gone too far in some respects. The Special Needs units are preferred by many carers. These units are home to a range of people including those with Alzheimers. Whatever other problems may arise, the residents here are usually less demanding in terms of domestic servicing. According to many carers, some of the residents in other units may be very demanding almost treating the carer like a servant in some cases.

It would seem that the emphasis on 'choice' relates to residents being encouraged to feel that the home is their home. They can be surrounded by their own things from home. Probably 'choice' does have its limits but the rhetoric leads to respect for residents and a different atmosphere from some of the older style residential homes. 'Choice' is shifting territory which has to be negotiated between carers and residents.

### **Caring as a vocation**

Many carers express the view that training is important but not sufficient to make a good carer. A range of attributes are important for carers and training is only part of that. One carer suggests that carers need special qualities. 'Not everybody could do it. I think you need a lot of qualities. The training is important but on Special Needs you need patience, you need lots of patience...I've always liked to look after residents how I would like to be looked after. I don't think it is a job anyone could do'. To reinforce this idea she quotes her sisters who find the idea of caring for older people quite incomprehensible. They say "How could you do all that? We couldn't do it. Cleaning up old people. It's not like cleaning up a baby".

A large proportion of the carers interviewed do not agree with the idea that women's caring at home is the main qualification for the work. 'Just because you have run your own home and brought up children does not mean that you can do this'. However many people suggested that caring is built on traditional womanly skills of caring and home making. Common sense should combine with training. Carers often put forward the idea that training 'brings out' what you already know, perhaps meaning that the training is building on experience. This relationship between the relative value of experience and what is learned on courses is a source of discussion. Some courses are clearly introducing new knowledge to many carers such as the manual handling courses. Other courses do seem to carers to cover issues that are common sense.

One carer also differentiated between what could be taught on a course and the skills of caring which she saw as sympathy and tolerance. 'I think you've got to have the caring aspect. I think that is the most important. You've got to be tolerant and very sympathetic. You've got to be able to listen to people's problems. The training side of it, yes, that is important, but to be able to have the caring side of it too, that's vital'.

Interviews with care staff in residential homes for the elderly, immediately reveal their widespread commitment to the work. Quite unsolicited, carers said time after time 'I love the work', 'I do it because I love it', 'I really enjoy coming in every day', 'To be doing what I am doing is wonderful'. Even those who found some aspects of the work difficult or stressful seemed to do so because of commitment and inability to leave work behind once they go home. The majority of carers interviewed do not 'take work home' and said that this was one of the best things about the job. 'Work stays at work'.

### **Domestic staff**

The gap between domestic staff and care staff is smaller in some residential homes where some carers also work as domestic staff on some shifts. Some domestic staff also help to feed residents. Like care staff, domestic staff also come to the work with a range of qualifications. Some people left school, took care of families and now do domestic work almost as an extension of that. Other people have had wide ranging careers and were made redundant. Unable to find other work, they are now cleaning. A former P.A. with a promotion company contrasted her present cleaning job with the high powered work she used to do. Still other people are coming to the end of their working lives and leave high stress work for something less stressful, working as a domestic in a residential home. Although considered 'unqualified work' this does not mean that staff working as domestics have no qualifications, although their qualifications may not be relevant to the job.

Different managers have different attitudes to training for domestic staff. Where there is a commitment to keeping the training down to what is necessary for the job, then domestic staff learn about chemical handling and possibly food handling. Where managers have a more inclusive attitude to training, then domestic staff are encouraged onto more courses to give a depth of knowledge about the work.

One cleaner in a city residential home, had been on a number of courses which had helped her self-confidence and self-esteem. She had attended a range of courses including Health and Safety, Fire, First Aid and Dementia. 'They have all been useful. Definitely the dementia because I work on the special needs. That course definitely did help'. In other homes the domestics would not be encouraged onto the Dementia course. That would be the preserve of the carers. Other cleaners are strongly encouraged by managers to go on courses. One cleaner was encouraged to attend a food hygiene course 'which I wanted to do anyway. I had to go on the senile dementia and it was very useful.'. Many other domestic staff from a variety of homes, reported that they had been on a range of courses including lifting and handling, inanimate objects and food handling.

Other domestics, around the local authorities, expressed the wish to attend the dementia course especially if they had to work in a Special Needs units. In some residential homes there is a great demand for more training from domestic staff who feel they are overlooked. One domestic worker in a rural home, suggested that the training for domestics should be far more comprehensive than at the moment, at least for those working on the Special Needs Unit. 'I think that there is a lack of training if you are going to be downstairs. How to talk to them. Not say "old boy" or "mate". Just because they have Alzheimers they still have their dignity. I have heard people spoken to like that'.

For many domestic staff, it is the safety issue which concerns them. They see Alzheimers residents as difficult and unpredictable. Having to work with people with dementia means that they often feel at risk. This echoes some of the concerns expressed by carers. At one residential home domestics pointed out that they house the worst case dementia patients.

Some are violent. They suggested that they needed training to deal with any situations, which might arise especially with violent residents. They would also like more information about residents concerning any problems like a tendency to violent behaviour.

This suggests that domestics and managers and trainers have different conceptions about basic training for the job. Obviously cleaners clean, but the context in which they work is also important. For these cleaners the context of their work included hazards for which they did not feel fully prepared. Working as a cleaner, in a Special Needs unit can be wearing and the work can be unpredictable. 'It can be an eye opener on the downstairs unit. You might clean the lounge on the unit, the carer is somewhere else and you are on your own with 4 or 5 dementia cases. They can get violent. They can fall, they can do anything. Their behaviour is erratic. If you have not been trained to deal with the situation, you can put yourself in danger and them. It can put a lot of people off that don't understand what a Special Needs Unit is'. Some domestic staff are fearful that they might act in an inappropriate way. They are aware that a violent response is not appropriate. 'You can't retaliate, but your basic instinct is to protect yourself'.

Not all domestic staff feel such anxiety when working with Alzheimers residents. Some domestic staff prefer that work. They can get on with the job and not have the resident giving them instructions about what they can or cannot touch. Both the Special Needs units and the mainstream residential have their pros and cons. Domestic staff who have worked with both kinds of resident say that they can suffer from low level violence in the special needs units. The way some residents treat domestic staff can be problematic. 'Upstairs with a lot of them, you get treated as if it were a hotel and you are a chambermaid. They can be very rude and I can't take that quite so much because they can help it'.

Apart from cleaning, the domestic staff in some homes have to help with feeding patients. They have not been trained for this task and this can cause some anxiety again because they have not been trained for the task. If someone was to choke would they take the blame?

In residential homes for the elderly there has been considerable moving about between categories of staff. Individuals may have worked as carers and domestics and some staff combine both roles. Because there is a considerable overlap of personnel, divisions about training do not always make sense to domestic staff. In some homes carers work a three day block. In contrast, domestics usually work every weekday and see residents more often than carers. 'We are in as much contact with them as carers. We see them everyday. Carers only see them three days in a row'. This may account for the dedication to the work expressed by so many domestic staff. Some see themselves in a similar role to care staff. Sometimes family members confide in domestic staff rather than care staff. The domestic may be a more neutral person to confide in, whereas the carer has taken over the role of family members. They may therefore regard her with ambivalence. One cleaner suggests that this overlap has repercussions for training. 'The way this home is set up, I would say in certain aspects the domestic staff need to train the same as carers'. These issues are further developed in the section on moving into contiguous tasks.

Demands can be made of domestic staff beyond the straightforward cleaning work and many staff see their role as wider than cleaning. They may also chat to residents and their families and give support if required. 'If somebody needs you, you don't turn round and say "I'm just a cleaner"'. Undoubtedly not all domestic staff are willing to take on such responsibilities and many say that they like the job because they can leave work and forget all about it.

One cleaner suggested that because of a perceived lower status of domestic staff, the information flow may also be blocked. This can have difficult results for both staff and residents and their families. 'There is also a lack of information. If someone has died we should be told. Then you would not go around singing near that room where their relatives are. I did that once. I felt terrible when I found out'.

### **Home Carers**

Home Care has changed from domestic servicing to a care service. In each local authority visits are carefully assessed for the amount of time to be spent with each recipient. Some carers in residential homes had spoken about why they made the change from home carers. Reductions in time per visit were made before the recent review, meaning that more visits, but less quality of time became inevitable. Some residential carers used to be home carers. They said that they changed job because new time limits made the work very difficult. 'Instead of being able to go into somebody's home for an hour, we were reduced to fifteen minutes or half an hour per person. Sometimes I had to do five people in a morning. I felt I couldn't spend proper time with people. Most of the people I was looking after needed to be talked to, as well as having a few things done for them'.

This system continues. In one local authority some visits are only fifteen minutes and time intervals between visits may be cut to the minimum. One home carer explained how her visits worked out in a small seaside town. Time is strictly allocated. She has to get into the client's house, make them tea and a sandwich, talk to them and fill in their notes 'all in fifteen minutes'. Sometimes no travelling time is allocated between visits. Visits are back to back. One home carer works in a village on her bicycle. 'Going from one side of the village to the other can take fifteen minutes. You are always running late'.

As in the residential service the home carers had to make changes a few years ago after the community Care Act. Instead of home helps they became home carers. This had both implications for training and for status. In theory they are also driven towards professionalisation and driven by consumer choice. However the stringent time limits can undermine the rhetorical commitments. Concerns about 'choice' for clients, become squeezed out by time pressures. One home help explains the dilemma. 'We are told to go in there and ask them what they would like to eat. By the time you've done that you've spent all the time just asking them what they want'.

So what is it that clients want? The home carers agree. 'They want a bit of attention; they want someone to chat to'. Clients also want their carers to be on time and some are impatient and bad tempered if they have to wait. 'Time is time. If they think you are coming by 9 o'clock and you are not there then that's not right'. There are occasions when home carers are unavoidably delayed. Then they feel very stressed about keeping clients waiting. If someone is ill and the carer to stay with them to wait for the ambulance then everyone else is waiting further down the list. 'You are frantically wondering, "When will I get there?"'

The work can encompass a range of different tasks and different age groups. There is considerable responsibility and snap decisions to be made. Many home carers say they worry about giving the right advice. 'You have to make snap decisions and hope that the decisions you have made and the advice you've given is right'. Just listening to home carers, the job sounds impossibly difficult and stressful. They realise this themselves because a number of carers mentioned how much support young people need to become home carers. However these carers manage to find positive reasons for continuing with their work. 'We do it because we love it. Yes we love the people. We could not let them down, especially the old people.'

They depend on us'. All the home carers, who were interviewed together in a group, started adding to this list of reasons: there is a variety of tasks and a variety of people; meeting people; having a laugh; knowing that you've made a difference, you going in there makes a difference to their day. 'I like that'; and being out and about. Interestingly they also liked the job for a certain freedom, which they enjoy. Lila explained 'You haven't got someone breathing down your neck all the time. Yes we have got time constraints but within that we are relatively free'.

The home carers as well as residential care staff also expressed a sense of vocation and strong commitment to their clients. They did not express the same sense of professionalisation as the residential carers. They have been unable to establish themselves as professionals in the same way as residential carers for a number of reasons. Residential homes have family members visiting residents but all responsibility for cleaning and care remains with the home. Family members will complain if the care is falling short of requirements. The pressure to meet certain standards is continuous. The home care service deals with those people still thought able to cope at home. Responsibility for their care does not fall solely on the home carer. Until recently the service was a domestic service. It does seem to suffer in relation to the residential service.

### **Training for Home Carers**

The trainers and managers maintain that Home Carers should have the same opportunities for training as the residential carers. The carers who were in post when the service changed from Home Help to Home Care can remember going on training courses and found them valuable. The access to courses for Home Carers does seem to vary across the local authorities. Some carers had been on a number of courses whereas others found courses difficult to access. As with some of the residential carers there is said to be an element of luck in whether or not they can go on a course. 'I think if you are in the right place at the right time you can strike lucky'. One carer felt that she had missed out. 'Some of us don't get on any training courses at all. I would like to have more training on the nursing side of the job'.

Some home carers were very interested in continuing development and had paid for their own first aid courses. Many others expressed an interest in learning more nursing skills, maintaining that they were needed for the work. As in residential care the line between caring and nursing is a fine one. But in Home Care the pressure is on to help clients straight away and other sources of support may be more remote, hence the need for nursing skills on some occasions.

In one local authority home care workers have been encouraged to work through NVQ level 2. For those home carers coming to the end of this process, this has been hard work but very rewarding. Those carers interviewed explained that they felt very empowered by the process of working towards a qualification. They had all left school without any qualifications so this was a novel experience. Although it was time consuming the carers who had gone through this process found that they were ready for more training and wanted to get back into education. In contrast, one union shop steward did not have confidence that the training budgets were high enough to meet changing demands in her local authority, saying that training is important but there is a trend whereby home carers are falling behind. Training budgets are not large enough, so carers are not getting the training that they need for any increasing nursing workload.

### **The future of the home care service**

One local authority had been through a recent review of their home care service. Wage costs were to be kept at a zero increase. A reduction of hours for the same money was negotiated. Thirty nine hours were reduced to thirty seven. A strategy giving an across the board enhancement of 20% for weekends, doing away with time and a half, double time etc. was also negotiated. The salary structure was negotiated around enhancement and the salary was slightly upgraded to £4-60 an hour but now salaries are effectively frozen for the next three years. A shop steward explained how the unions had very little room for manoeuvre. 'Direct Service Organisations are already in place so it would not take long to increase their sphere of influence'. The stringent re-drawing of boundaries may not run very easily with the prevailing language of consumer choice. This point was not lost on union shop stewards. 'There is a lot of talk in social services, charters and all of that, but in many areas services are at minimal levels'.

Both Home Carers and shop stewards mentioned the changing mileage allowances. This seems to be a particular bone of contention. In one local authority the mileage allowance is so low that some carers have left unable to earn a decent living. The carers themselves are in no doubt as to how they are valued. 'The mileage allowance doesn't cover mileage, let alone insurance or wear and tear. But you must have a car or you can't work. They rely on us using our cars. We are subsidising the service aren't we?' The new contracts do not seem to have much support however the carers themselves say that they would never strike. It would hurt their clients.

This stringent financial budgeting works against any ideas that home carers are professionals. They do share a tremendous sense of commitment to clients and many have a sense of vocation. However the cuts have undermined any sense that the authority values the service and undermines both the language of consumer choice and the language of professionalism. This Home Care Service finds it impossible to work within local authority guidelines concerning 'choice' for clients. Nor can they provide the support and human contact which people confined to home really want. Still the staff are committed and loyal to their clients, and in many cases, keen to develop and keep up with training.

### **Caring as a career**

Because of the changes to the pay structures for carers, caring can now be viewed within a career structure, so gaining qualifications within that structure is potentially part of a career strategy. It is a role that a carer can develop, become acting team leader and team leader. The training manager reinforced these points explaining that for younger woman, coming into caring is coming into a culture which can offer career progression.

One focus for ideas about creating a career structure is the government-sponsored Modern Apprenticeship programme. The age limit for participants in this programme is 24 years. This has created some animosity and accusations of ageism, although the age limits are specified by government. In one local authority the Social Services Department worked with the local TEC to initiate 24 apprenticeships. This is a major focus for the training manager. 'I would like to set up a recruitment campaign, which maximises the modern apprenticeship agenda. We could attract people in through recruitment, through modern apprenticeship, offer them NVQ 3 and then they can go on, if they wish, to management.... Theoretically we can offer people career progression from care level to director'.

In terms of the development of a career structure, one group which stands out from the rest are the younger women carers. All of these said that they enjoyed the work, but many also had

another agenda which related to training; they intended to make a career in care, hoping to rise to team leader and even home manager. They may have come into the work with good GCSE's or 'A' levels. For this group training, including NVQ's was a vital aspect of the work.

One young carer gained good grades at GCSE and then stayed on to do a GNVQ in Social Care. She worked part time in a home for the elderly while she completed the GNVQ, then came to work for social services lured by the prospect of NVQ's. 'Social Services had just advertised for candidates for NVQ3. So I came here and did it. It was very time consuming but I did it'. She wants to do more NVQs and then work her way to the top. Her ambition is to run a home in time. Another young carer is in her early twenties. She may make a career in nursing or in caring. Since leaving school she has been working in residential homes and has enjoyed the training. It has given her confidence in her ability especially completing NVQ3. She has just had a baby and is working part-time but she also has an eye on the future. She wants to complete more NVQ's and work her way to the top. Here is another potential manager of a residential home.

Many of the team leaders started out as carers and had worked their way up. A traditional method of doing this is to 'act up' which means to take responsibility while the team leader is away. Now NVQ's offer another route to promotion which has yet to be fully incorporated by the local authorities. Qualifications like NVQs do provide another aspect of the professionalisation of caring.

This creation of career progression routes is not limited to young people and to the achievement of NVQs. In one local authority new routes into social work are being created through a Union Learning Fund project. The partners are Unison, Ruskin College and the local authority and the project employs distance learning techniques to create a route into professional social work qualifications for unqualified care workers.

## **Workplace Learning: Opportunities and Constraints**

### **Introduction**

The aim of this section of the report is to draw out examples of some of the extremely innovative initiatives in learning and teaching in the workplace. In particular we want to highlight the significance of employee led activities and the positive contribution that can be made by supervisors and managers. However, it is important to recognise that the initiatives we describe here are made possible by the nature of the job or work organisation and reorganisation, by groupings of supportive colleagues or by the identification of 'windows of opportunity'. Not all employees are in positions that make it possible to follow such paths, therefore, we also identify a range of barriers to workplace learning. Finally, we found a number of people who did not wish to be involved in learning and development which we consider.

### **Teaching yourself the job**

Many workers learn to do their jobs through a process of trial and error or through drawing on their experience outside work or in a previous job. This may often be in the absence of attendance on formal training courses. A customer contact officer explained how he had learnt to deal with general inquiries and customer complaints. He had previously worked on the ordering system for highways maintenance work. He therefore knew all the types of work that the department carried out and his new job was to explain this to the general public. There were courses available on dealing with customers and aggression and he said he would have liked to go one to get a certificate to say that he had had the training. However, he had been told that he already knew what he was doing. He therefore drew on his experience from an earlier job of working in a window company and from covering for staff in the office when they were absent. He had learnt through experience the best ways of dealing with irritable callers: 'It's about keeping calm - this is a skill. You blow out when you come off the 'phone. You have to watch what you say. If they swear, you let it ride over your head'. Since work is only undertaken if it meets the criteria for action, the public do not always understand why this should be the case. 'The public can go ballistic about it ...I don't know the Highways Act, but I've picked up the clauses....we're just the front line and we pick up all the flack. You need a real good sense of humour, otherwise you just crack up'. He had learnt what worked effectively: 'If you're friendly you get a better response. You can have someone ranting and raving. If you resolve the situation and show that you will do something about it, they end up calling you "mate". Often the public have a view that you're passing the buck because you work for the council'. This approach involved empathising with the problem, being helpful in directing the caller elsewhere, along with an element of 'baffling them with procedures'.

In addition a number of staff engage in external courses in their own time and often at their own expense, even when the course appears to be work-related. For example some HCAs were studying counselling and clerical staff were studying computer skills at their own expense. The employers were supporting a relatively narrow range of learning opportunities and often relied on staff bringing with them a considerable level of expertise in their area of work. This could perhaps be illustrated most starkly by the example of security staff. The importance of their role is obvious in a health service setting with expensive machines and computers, stores of drugs, geographically isolated sites, vulnerable clients and staff working 24 hours a day. In Northern Community Trust security staff were responsible for approximately sixty five sites throughout the city. New security staff were given little or no induction and one member of staff described how they are expected to know and deal with all the alarms, which are not standardised, across all of the sites. This employee was able to draw on more than fifteen years experience in security before joining the trust which he felt gave

him the confidence to work with the alarms, even if he was not familiar with them. Another member of security staff did take part in an induction programme which covered issues such as clinical waste and handling dangerous situations. He worked on his own, from 4pm to midnight responsible for a large hospital site, spending most of his time locking and alarming. For three or four nights when he first started the job a colleague went round with him, showing him the various keys and alarms. However, with more than fifty different keys he felt he did not learn half of it during this period of instruction and he said 'I've got no help since then, I manage through common sense'. Having worked for over forty years in his last job, in charge of a steam boiler, he had got to know the security staff there and drew on this second hand experience at the trust, remembering what they had told him about the job.

There are other ways in which staff learn to do their jobs more effectively. A cleaner recounted how she had taught herself to organise her time and had used her interactions with office staff on her unit to organise her work. 'I loved the floor I was on, I communicated well with the staff - I knew what I could do for them and they knew what they could do for me. ...They would tell me about spillages or if there was a bit of a mess after a party. I'd clean it up, though they should do it themselves or I'd throw them a couple of rubbish bags. Cleaners are underestimated. People think you're a nothing.....the people here are really considerate'. Good communication provides a useful source of learning for many jobs which involve contact with clients or other staff. In the same way, a nightcare worker in a home said she found sitting and talking to residents the best way to learn about their needs and to get to know them. These two examples, along with the observations made in the earlier section on home carers, suggest that having the time for communication is an important element in employees' learning strategies and in establishing the parameters for the quality of service provision.

### **Strategies of self-development and job enrichment: developing a portfolio of contiguous tasks**

One way in which workers develop strategies to make their jobs more interesting is by expanding into related tasks and areas of activity and expanding their range of competencies. One leisure assistant explained how she had expanded her work into a range of different activities. She had started as a lifeguard on a casual basis, but was also handling enquiries, cleaning and tidying up and had expanded into swimming instruction and working as a receptionist. She was in charge of the swimming instructors, the play and voluntary schemes and was 'acting up', having taken on responsibilities for her shift. She explained that the expansion of the range of activities depended on individual inclination. 'It can be quite varied work. Some people just want to be lifeguards. Others are jacks of all trades ...it is a case of what you want to make of the job ..... Doing other things - it's a break, it gets your brain working'. The way she learnt these skills was a combination of on-the-job training with another member of staff explaining the duties to her and courses, such as swimming instruction, which she had undertaken in her own time.

A maintenance operative in a home for the elderly explained how he had become involved in the caring side of the work. From working in maintenance and repairs, he had taken the test to drive the minibus. He takes residents to the do-it-yourself shop to choose the wallpaper to decorate their bedrooms. Initially, the manager asked him if he would like to help out with the care work when other staff were on holiday. He started working as a 'floater', working alongside care staff. He said he had 'a lot of irons in the fire' - he calls bingo and plays games with the residents and had bought his own Father Christmas outfit to distribute gifts at Christmas. He had clearly taken to the work and was putting enormous emotional energy into it. 'I love life and I love serving people. If you can bring a smile to someone's face you have

achieved something ...tomorrow's promised to nobody'. Similarly, an Asian woman who had cared for her mother and father-in-law explained how she had made the transition from domestic into care work. She had added voluntary care work in a daycare centre to her part-time domestic job, bringing with her an ability to speak Gujarati. Having gained this experience, she was then able to combine care and domestic work, eventually taking a job as a full-time care assistant.

One woman who had made a move from domestic service was a woman in her 50s from London Community Trust who had taken the Return-to-Learn course. She had worked as a part-time domestic for fourteen years, having recently been made up to supervisor and moved to full-time working. She describes herself as someone who has always studied, having studied languages, typing and office procedure at college. After the Return-to-Learn course she was given the opportunity to learn various clerical jobs in the directorate including reception and switchboard. Although it was not totally clear who had made the decision to give this woman the opportunity to in effect have work placements in various sectors of the directorate, it is an extremely unusual example of management identifying and utilising ability. They have gained an extremely hardworking and enthusiastic member of staff who works flexibly, providing cover for a range of sections and because she has worked at the hospital for many years has a high level of knowledge about the organisation. While she has been given opportunity to further develop during work time, on computing skills and an NVQ Level 2 in Customer Care, this woman has also devoted much of her own time to learning the switchboard and other skills.

Another interesting example is that of the ex-porter at London Community Trust. During the early 1990s at one of their small community hospitals there had been two porters employed. Traditionally porters have a degree of geographical mobility and flexibility in terms of the use of their time. The porters used this flexibility to familiarise themselves with and experiment on the newly arrived computers. Clerical staff had less opportunity for this 'learning by trial and error' method, and the porters became the hospital experts on the computing systems. When a reorganisation removed the role of porter, the elder porter took early retirement and the other joined the administrative staff, teaching other clerical and administrative staff about the computer but still carrying out the occasional 'odd job' around the hospital. This is a particularly interesting case of occupational mobility from a predominantly male to a female area of work, but also from a manual to a white collar job. The organisation of work in the porter's job provided the space to enable this self-directed learning.

In order to make their jobs varied and interesting, some young graduates in routine clerical jobs in one department had divided their duties up amongst themselves and had got to know each others' tasks. They had suggested to their manager that they should do the duties on a rotation basis and this had been agreed.

Some older and more senior members of staff recognised that these patterns had characterised their own careers. For example, a manager in the Transportation Department explained how she had learnt her own skills when she started working twenty years previously. She had moved around a number of different jobs within her department and this was possible because people were moving jobs and employment was expanding. This is more difficult where the service is contracting or stationary.

### **Tensions in development reviewing: how staff learn to work within its limitations**

Where jobs are undergoing a process of professionalisation or where there is a clearly established career path, development reviewing can be a good mechanism for identifying staff

development needs that prepare them for job progression. There was considerable evidence in the interviews of staff whose development needs had been identified in this way. This contrasts with the situation where staff are in jobs with no or few possibilities for job progression. If expenditure on training can only be justified if it is relevant to the job, then engaging in such a procedure can lead to frustration. Although development reviewing, under various names, was widespread, many staff felt that because there were no progression opportunities in their jobs, there was little point in identifying development needs if these were likely to be refused.

A good example of this problem is illustrated by the case of a young graduate who was working in a routine clerical job. She explained that the qualification required for her job was GCSE Maths, although her own view was that even this was not essential to the job. In the job interview, she had been asked to add some figures up 'it was just multiplying £1.50 by three. It wasn't Pythagoras' theorem'. She had come in to the job in the hope that there would be opportunities for job progression but had found that there were few and, having been promoted from scale 1 to scale 2, had been unsuccessful in gaining further promotion. In her appraisal sessions she had asked for formal off-the-job training and for opportunities to act up in other jobs on a higher scale, but in each case it had been turned down because it was not directly related to her job. Her frustration was evident 'There have been a number of courses I would have liked to go on but I was turned down. There have been others that I haven't asked about because I know I will be refused. The problem is that you can't go on courses because it is not related to your job and you can't do the work because it isn't your scale....If the Council opened more doors, it would make it more interesting, even if you weren't promoted'.

Some staff might be disillusioned by such experiences and, as reported earlier in the findings from the questionnaire indicate, view Investors in People as something that benefits management but not staff as a whole. Others have learnt ways to use the IIP process to their own benefit. For example, a staffing officer in a payroll section explained that although he thought of the development review as positive rather than negative, his view was that there was no point in identifying training for his own personal development through it. Rather, he had taken the approach of making a suggestion for improving the service, which, if accepted, would provide him with an opportunity to gain hands on experience of using IT, which would have consequences for what he needed to learn to be able to implement it.

Other staff recognise that they must use their own initiative and resources if they want to move on, not necessarily in their current employment. A staffing assistant reported being refused courses at work because they were not relevant to his job. He was doing a computer programming course at a further education college in his own time in addition to short courses he has done at work. He had proposed doing quite an expensive course on which his employer could obtain a 50 per cent discount. He had been prepared to pay for the course himself, but access to the discount was refused. He believed that there were few opportunities for job progression in work and saw greater possibilities outside work in the computing field. He was not alone in this: he was receiving support and encouragement from colleagues at work and they all bring in course materials from college and other sources to show each other. He said 'we are all keen on self-improvement and we encourage each other. It is not management led'. He identified a number of different sources of learning that he drew on: the college course, an Open University course that he was about to start in computing, as well as books and internet resources. He was also seeking a secondment with the IT department.

In the analysis of the Employees' Learning Experiences survey, we pointed to the extent to which employees claimed to have undertaken training and courses on their own initiative. This example demonstrates how staff use their own initiative to gain access to employer-sponsored training and informal learning opportunities in the workplace. A staffing assistant in her early 20s who had left school with GCSEs explained how she had asked for day release when she had started working with the local authority in a clerical assistant's job on the lowest scale. 'It was not compulsory. It was up to you. If you want to go, the information is provided and you have to ask for support'. She had to wait until she had passed a six month probationary period. She emphasised that she had instigated it and that in her view many of the people in her office would not have done this, even though the opportunity was there. Her view was that it had probably benefited her as an individual more than the organisation, although she was more aware of how the way the organisation worked as a result of going on it. She felt that going on the course had made her more self-confident, had improved the way she presented herself and had helped her to gain promotion to the next scale. She felt the next educational progression step for her would be to do a degree, but the council were no longer sponsoring staff to do them. Although she had periodic meetings with her line manager about her development needs through Investors in People, she felt that there was no scope for progression in the office. Nevertheless, she was very clear in arguing for individuals to help themselves as far as learning was concerned rather than being 'spoon-fed'. 'Hands on is the best way to learn. You can shadow someone, but you have to ask questions'. She was starting a GCSE in Psychology at college, paying for herself because she thought it would give her a better understanding of people's behaviour and was hoping to stay in personnel. She was keen to go on a computing course and was teaching herself on her own computer at home.

Another staffing assistant in the same department spoke of how she had used opportunities for secondment to learn more about the work of the department. She recognised that the finance was not available for formal courses and day release, unless staff could demonstrate that they would benefit the organisation. This member of staff had a degree and had been travelling after going to university. It had been a 'massive shock to the system' to discover the state of the job market when she returned to England and she was overqualified for her job. Through her development review she had requested placements in other departments and had also spent time going out on site visits with contract managers. She felt that the organisation had benefited from her understanding of the links between different parts of the service: she had been able to suggest making improvements to the system and was able to bring a fresh outlook on areas where they were experiencing recruitment difficulties. As far as her job was concerned, there were few possibilities for promotion. Nevertheless, she felt she had received positive reactions from colleagues as a result of her secondment experiences, that the secondments provided a good opportunity to absorb different experiences and that she had a range of people whom she could ask for advice and help in seeking informal learning opportunities.

These examples are all of relatively well-educated, young people who have found ways of seeking new learning experiences even within the constraints of limited job progression. They combine this with participation in learning in formal educational settings outside the workplace. They are relatively articulate and in some cases are able to draw on the support of colleagues. They therefore have greater possibilities for taking the risk of funding their own learning outside work, than colleagues of the same age and older who have already acquired family responsibilities and can not afford to give up their jobs. The difficulties of combining learning with work and family responsibilities is one of the central themes to come out of the employees' learning experiences questionnaire.

### **Managers and supervisors as teachers and mentors**

Many organisations are devolving responsibility for Human Resource Management policies to line managers. They are thus acquiring a formal role in training and development, insofar as they are expected to conduct forms of staff appraisal and development reviewing which may or may not be linked to the assessment of performance. Managers and supervisors also have a key role in providing information and encouragement to staff to undertake training: they are responsible for passing on information from trainers and corporate HR managers about opportunities and also deal with issues of cover and release from work. The development reviewing role is formalised in the Investors in People standard and there was widespread evidence of managers undertaking this role.

The acquisition of a formal role in development reviewing does not necessarily involve seeing oneself as a teacher and mentor to other staff. Nevertheless, we did encounter a number of managers and supervisors who clearly perceived themselves in this way and who felt they had a role in facilitating informal learning opportunities in the workplace as well as formal learning opportunities outside it. They had taken on these roles partly in response to their own experiences and philosophies towards learning at work. It is also notable that they saw this as a process of sharing knowledge with other staff. They did not see this as undermining their own position in the workplace and in many instances recognised that it would mean the staff would move on and get promotion elsewhere.

One production supervisor stated 'If I felt I needed further training ....I have always been able to ask. I learn from meetings, from shadowing my manager, things fall into place, and training on equipment from suppliers. It took me two years to realise there wasn't anything I couldn't solve if I didn't try, such as knowing where manuals are kept.' She goes on all the courses so she can see what staff learn and can check that they apply it when they return to work. She encourages them to go on courses by saying things like 'he's a lovely man' and 'you get a nice lunch' and will ask the training coordinator to look out for the quieter ones. This supervisor does not feel threatened by other staff acquiring new skills. She argued 'all the staff are long-term here and they know their jobs. I will talk myself out of a job if I keep saying it'.

An assistant manager in a care home reflected on his own experience of learning in a home for the elderly specialising in the care of dementia and Alzheimer's disease. 'I had a woman manager who was before her time. Men care assistants were rare ....she was non-conformist and forward thinking. She was an old-style matron but different, it was the first home for dementia and Alzheimer's and people came from all over the world ..... it was the training base for the department at the time. I was employed with other men who had no experience .....we were a clean blackboard and she did writing on it. You do things automatically because she installed it in you.' Although he had not liked school, especially the paperwork and authority, he explicitly recognised his role as a teacher in the home: 'it's role reversal, I'm a teacher in a similar role, training staff'. He went on to give an example of coaching young staff in laying out the dead for the first time and allaying their fears, telling them 'this is the last thing you can do for them it's an honour. They should be clean and nice, have a wash and their hair brushed. You were looking after them when they were alive, they are not going to hurt you when they are dead'. In identifying the many sources of learning in the workplace including the tricks of the trade which older workers could pass on to others (an example was given of rubbing pressure sores with soap to stimulate the skin), he also recognised that he had learnt everything he needed at management level to go on into a more senior position. 'I've had opportunities and have been very fortunate. I've had good managers. This contrasts with the situation of knowledge is power in some homes where staff are kept in the dark and suppressed'.

Sharing information with staff and on-going supervision was also emphasised by the Asian woman manager of a daycare centre. She argued 'some managers won't share their knowledge. My view is "don't keep it to yourself - share it with others - support and develop them. We would have a good community if all of us did it."' She talked about listening to staff, taking on board their ideas and discussing this as a team. She recognised the need for Asian women to fight for their rights in the family and in work, arguing that developing oneself through training and passing it on to staff to make them more assertive was very important. She saw her job as including training others, giving to others and promoting others. She recognised that she was extending her own job beyond its job description, but equally she felt that this was something she was doing for her own staff as well. She was preparing some of them to take on a management roles and one, in particular, she now felt, was ready for promotion. Both this manager and the assistant manager mentioned previously were conscious of the potential for using the workplace as a site of learning, one for its celebration of the cultural diversity of the service users, the other for its specialisation in the care of the elderly. Both felt that their respective workplaces were a learning resource for other staff within the service.

Many workers gave their appreciation of things they had learnt from managers who had 'been there, done it and got promotion'. A catering manager who had 'come in at the bottom' felt that there was too little emphasis on practical training which she saw as central to her role, having run a training kitchen where deputy cooks came for their training. Her deputy recognised this role in training and encouraging others to progress. 'She always shows me the quickest and easiest way "don't use the mouse, use the cursor" ..... She told me to apply for the deputy cook's position, she said "you can do it"..... She's trained everyone here.... she's definitely a good teacher'. Having a manager who is also a teacher in turn provides a role model for other members of staff as they aspire to progress into management. This deputy explained how she had been involved in the induction of four new general assistants in the kitchen and was now coaching another member of staff, who would then be able to apply for promotion for her job as deputy cook when she moved on.

Nevertheless, managers and supervisors do not just act as trainers and teachers, but also have a role in reinforcing what has been learnt on courses and through on-the-job training. A cleaner working in a public building explained how her supervisor had taught her how to organise her time and establish a weekly routine. 'I said to Pat "you're the one who's taught me everything - it's what I know today". ....the best way is to have someone like Pat who's been there and done it. I couldn't change my system now'. The same cleaner continued: 'I would hate to be reported to her because my work is not done properly. She'd say "that's not how I taught you" and I couldn't face that.' These routines are most easily reinforced where there is contact with co-workers, who will call out 'use the red bucket!' or 'bend your knees!' to reinforce hygiene and health and safety practices. They are more difficult to reinforce where cleaners work in isolation and have infrequent contact with their supervisors.

### **Barriers to workplace learning**

Even where the organisation's positive approach to workplace learning is reflected in the particular department, there may still be barriers to individual or groups of staff's experience of learning and development. Where expectations of training have been raised, but that training is not delivered staff felt very disillusioned. In certain situations staff were perceived by managers as having little motivation to learn and progress but in practice they have few routes for achieving occupational mobility. The most widespread problem was in getting time off work for study or attending courses. Getting line managers to release staff from work is

the archetypal problem for human resource and training managers because it interferes with the day-to-day running of the service. This is particularly a problem for 'front line staff' involved in patient contact, although there was also a general feeling that more effort was put into enabling qualified staff to attend courses than unqualified. Some managers operated a 'two at a time' policy for example which limited the number of staff who could attend courses at any point in time. Where it was a small site, managers often tried to bring in speakers to address groups of staff. The difficulty of time for training could be illustrated by the reception staff in the X-ray department at Hospital Trust where activity was unrelenting. Patients were arriving continually and the phone rang almost immediately it was replaced. Despite this pressure the staff worked together supportively, but said that there was insufficient cover for sickness and holidays so training was the 'basic what we need to know'.

Release from work is frequently a problem, particularly where staffing levels are low. Sometimes managers and supervisors are reluctant to allow release because of pressures on site. Two members of staff in the museum who were aspiring to move into a supervisory post reported having mentors and regular discussions of their development needs. Although courses had been identified in consultation with line managers, both had had recent experiences of being unable to attend due to short staffing. In some cases and for some kinds of learning, it may be easier to organise opportunities for in-house training, but again pressures of delivering the service may intervene.

Night work and shift work also affect the ability of staff to attend courses and to achieve progression in their jobs. One care assistant who was working nights planned to switch to day work when her youngest daughter went to secondary school. She already had an NVQ level 3 as a health auxiliary and was keen to undertake further training. Another who worked mornings and evenings complained that many in-house courses were run in the afternoon which were impossible for her to attend. A cleaner explained how it had been difficult to take up opportunities for education and training even though she would have liked to do something different than cleaning. It was a question of having the time. She had a family and her husband works permanent nights. It's 9 o' clock when he gets home and the buses only run every half and hour.

A payroll clerk at the City Council had studied 'A' levels at college and had decided to get work experience rather than going to university. He felt he definitely had more qualifications than had been needed for his job and that his experience of dealing with customers in a part-time job and helped more in getting his permanent job than his training and qualifications. He had taken an NVQ and had been allocated three hours a week to collect his portfolio of evidence. Although management had seen this as useful, some of his older work colleagues had seen it as a skive.

Some staff had started training or development programmes but for various reasons could not complete them. One clerical worker began an NVQ Level 3 in Administration which she described as 'rubbish'. This programme was provided in conjunction with a local college and the staff felt that the tutors did not understand the nature of the health service context. In this case the staff had been waiting for the tutors to contact them for so long that they had assumed that the programme had been cancelled. Similarly, an HCA described a situation in which her NVQ assessor had resigned from the organisation leaving the care assistant and her colleagues no opportunity to complete their programme. In these circumstances many give up, only those totally committed to development persist.

Even where large organisations positively encourage the training and development of staff, this may not extend throughout the organisation to the detriment of particular departments, workgroups or occupational groups. There are major sectors of the workforce who seem largely ignored when it comes to training and development, such as the clerical staff. In one department when a new computer system was introduced the staff had to go on training in their own time, although it was paid for by the trust. There were some very small pockets of exclusion, such as catering staff based in community homes, where there would be just one or two staff who often felt isolated, with no one in the home who really understands their occupational area. Their line manager is often the senior administrator, who may have little specific knowledge about catering. A course had been organised in one home for all of the healthcare assistants on nutrition. No one had thought to invite the catering staff, who found out, complained and were then invited.

Equally there are some small groups of staff who feel that they get forgotten about. Health visitor support workers divide their time between clerical work and assisting at clinics, doing tasks such as helping weigh babies. Because they work at different locations and do not have their own office or desk they feel they lack a sense of belonging to a particular place or part of the particular teams. They may work with more than one team, though often are not invited to team meetings. In some cases it is not obvious who their line manager is. Some staff had enquired about various training courses but had no feedback. One woman had been on a one-day basic computing course and had put her name forward for a follow up, but had been refused for lack of funds. She felt that there was little point in training: 'There isn't anywhere to go so you would have to say that you were going to do some training to do another job at the end of the day. There's no point training for our job because this is where it stops. Even with an NVQ this is where it still stops.'

Problems may not merely relate to barriers to access to formal training programmes, but also access to on-the-job learning. While this may relate to whole groups of staff, in the fieldwork there were a number of cases where individuals felt that they were being excluded from learning because of their age or their sex. One young woman who was working as a trainee information technology technician described how learning for this role centred on visiting various departments with a qualified technician to deal with technical problems. She suggested that with intensive on-the-job training it was possible to train in about six months. She had been in post for two years and was now very rarely taken out to learn about the various technical aspects of the job. She was continually left in the office to deal with filing. Her interpretation of this situation was that as the only female in the department, and the youngest member of the department, she was being specifically excluded, despite having more formal qualifications than the other staff. Having broached the subject with a more senior manager, she had been sent on a wide range of formal training programmes, but all related to software topics. She desperately wanted to be a technician dealing with equipment but could not gain access to the necessary training. She felt that the situation was becoming worse as her exclusion meant that she did not get to know staff throughout the trust, who would then specifically request one of the men rather than her when they had a problem.

As indicated in the open-ended comments to the questionnaire, age is a further factor affecting workers' interest in undertaking training. One night care worker in a residential home wanted to do a nursing course, but had been told that at 45 she was too old to be accepted. Workers who feel they are in dead end jobs and can see no progression routes within their current employment may feel that their options are restricted and may also find themselves lacking in confidence. Those who are close to retirement may feel that doing courses is not for them and that the resources are better spent on younger workers who will benefit more from them.

For some staff, there may be multiple reasons for their lack of access to learning opportunities including the threat that their increased competence may present to their managers and supervisors. Another example of an individual who felt excluded was a fifty year old man who was employed as a clerical support officer, having worked for twenty five years in local government as a chief administrative officer. While he was formally over qualified for this post, he had been made redundant and had no computing skills, which limited the range of jobs he could apply for. He also felt that ageism permeated all aspects of training and the labour market. Nonetheless he was determined to 'make a success of it', although he described himself as 'very unfulfilled' but that he needed the income. He believed that the lack of computer skills was his main problem and had been to college for basic training, however, he could not afford further college courses and because he did not need these skills for his job, which was mainly data inputting, the trust would not support him. He had asked his supervisor if he could use the computers at work in his own time to develop his computer skills, but was refused on the basis that other members of staff would not like it. He perceived the problem to be one of middle management, asking 'is there a fear that I would be better qualified than her?'. Equally he felt that there was a problem in geographically dispersed workforce of senior management at head office just not understanding the conditions under which staff work at satellite sites. This was a view expressed by many staff throughout the fieldwork. Interestingly, the courses which most people said they would like to attend were related to computers. Even in jobs where they are not used at present, there is a feeling that they will be introduced, for example for HCAs. Many people have computers at home, or have children who are familiar with computers.

**Different values in relation to work. Many workers are not interested in job progression (or not at this particular point in their lives and not in relation to this job)**

Throughout the case study organisations there was a widespread view among staff themselves and line managers that once staff were within a few years of retirement there was little point in pursuing training and development, particularly where staff appeared to have the necessary technical competence to do their job. Age was one of the prime reasons given for disinterest in training, although a manager in Rural County Authority also felt that staff with little formal education could feel threatened by training and that they were limited where they also have heavy family commitments. Where there is no clear career path, staff often do not want additional training, but one member of staff said that there was an assumption that because staff were older, they did not want training. She also suggested that the lack of training gave staff a negative message about how far they were valued.

Some staff expressed an instrumental attitude to work, not wanting development claiming only to be there for the pay packet. For example in the film library described above, there had been some cases of staff moving into secretarial work, yet one woman wanted to stay in the job and not pursue training, she said, 'when I go home I like not to think about work'. Whilst this was a view expressed by a range of workers, there should be some caution about taking such a statement at face value, such views may merely reflect the lack of opportunities available. One administrative officer in her early fifties said 'I just want to come to work, do my job, do it well and go home. I don't want to do an evening course, except for a short time. I have family commitments and it's not what I want to be doing with my time ...I suppose I ought to feel guilty about not being more ambitious'. One cleaner recalled, 'I didn't want to do supervision, though I have been asked. I just want to be a cleaner. It can be a hassle with people .... I have two years to go to retirement. Learning is all right for the young ones if they have the stamina.....My supervisor is happy with my work and that's all I want.'

Although some of the jobs examined provide opportunities for job progression, not all staff are interested in a career, or at least, not given their current childcare responsibilities. Many general assistants in school kitchens take the job because it is close to home and allows them to combine childcare responsibilities without having to pay for care. An area manager believed most staff came into school kitchens by accident as a first step back into work after having children. As one kitchen supervisor explained 'There are career opportunities if they are interested in the cooking side. I can show the general assistants the cooking and there is a course which is an introduction to the deputy cook's work. They can then apply for the job and once they are appointed they go on a three week course. But most come to earn money, to go home and forget it. The odd one wants more'. This was confirmed by several general assistants. The overwhelming motivation was to have a job which fitted in with having small children and the biggest bonus was the school holidays. Many were reluctant to undertake training off-the-job because of their childcare responsibilities and had their sights fixed on other types of jobs once they had more time available. One cleaner who was also working in a school kitchen said, 'there are opportunities for job progression here but I'm not interested. I'm interested in getting out'. She had been doing a word processing course and had started a computing course in order to move back into office work. In the same way, an area cleaning manager had found it difficult to get cleaning staff to take an interest in nationally recognised qualifications. Although the service ran a lot of training courses which allow staff to progress to become mobile caretakers and shift supervisors, not all cleaners want to do this. Cleaning was 'not that kind of environment, especially with part-time staff .....They come out for their £30 a week and nothing else'. Combining shiftwork with childcare responsibilities and sometimes another part-time job as well makes training after hours problematic. Sometimes short courses are run in the holidays on site in schools, because staff find it difficult to attend the central training facilities.

Other jobs are narrowly designed, involve short hours and have little or no scope for occupational progression. School crossing wardens normally work 8 to 10 hours a week and tend to be recruited from three main categories: women and men over the age of 50, young women with children and pensioners up to the age of 75 (provided they pass medical checks). Although there are occasional openings for supervisors, these posts are rare and they are not necessarily recruited from the crossing wardens. Training is provided to ensure that procedures are carried out correctly and that the law is observed. There is no personal development training available though on occasions with specific cases managers will help 'as best we can'. These jobs are seen as being for people who are at the end of their working lives, or who want a job to fit in with childcare responsibilities and the school holidays. It is not seen as a job for a young person.

Nevertheless, it is important to emphasise that a lack of interest in a particular training course or in competence-based assessment should not necessarily be interpreted as a lack of willingness to learn about the job, nor a lack of commitment to doing the job well. A night care assistant in a home for the elderly indicated the extent to which she was prepared to undertake new training. She had taken a range of courses on AIDS and senile dementia which she had found very interesting and said that there was nothing that would put her off learning. However, she was not interested in taking the NVQ in care nor the QUASER training. She had been in the job for nine years, liked what she was doing and did not want to move up the scale. She was very happy to undertake supervision sessions even if it meant coming into work on her days off and emphasised that she thought the quality of care was the most important to this kind of work. She had switched to night work because of health problems, finding it less stressful than working during the daytime. In this woman's case it is possible to talk of having a vocation. She had sat with residents and comforted them as they lay dying and

the knowledge that she was able to do this for them had given her great satisfaction. She now wanted to work in a hospice for the elderly.

## **Key Issues Emerging from the Findings**

Low grade work in the public sector is undergoing enormous change, driven by a number of different factors. In some areas legislation is creating a demand for different mix between qualified and non-qualified staff, while a shifting balance between social services and the health services is changing the nature of client need and the skills care staff need. In the health service, new jobs are appearing as local collective bargaining has opened the way for a wide range of new forms of employment contracts which break down traditional demarcation lines and introduce flexible working practices. Significantly, new jobs are being created which have no career structure and this reduces opportunities for workplace learning. In local government, the driver for change has been the improvement of customer service and meeting the needs of service users and local communities. Equally some jobs are disappearing as new technology removes the need for certain work. Other areas of work are being contracted out to the private sector or are being reorganised with shifts in organisational boundaries or through the delegation of financial management to new business units. In this context the training and development of staff takes on a particular significance. Training may be regarded as a reward, giving status where there was previously little, as recognition for effort and a signal of value to the organisation and possibly opening up opportunities in employment. Equally, it may be perceived as a threat, an indicator of poor performance or the forerunner of work intensification.

With initiatives such as Investors in People, the general work climate is one in which greater emphasis is placed on training and development. Although there were different management styles and approaches in the case study organisations, in all of them the expectation that staff from every grade should be involved in development activities was set at corporate level. Whether or not this ethos permeates through to the level of the workgroup or department depends on a range of issues. How learning is perceived depends to a large extent of the interplay of the nature of the environment created by the organisation with changes in job organisation and other aspects of the employment relationship. Central to this are line managers and supervisors who make many of the decisions about individuals' access to learning opportunities, be they formal or informal, on or off the job. Their perception of staff's willingness to learn and need to learn may be influenced by factors such as age, gender or the likelihood of career development. It is these line managers who control the immediate work environment and who control the flow of information about learning opportunities. They hold the key to release from work, but also their encouragement or failure to encourage can contribute to staff's motivation to learn.

The research findings show that staff on the lowest grades in the public sector are a heterogeneous group with a range of different needs in relation to workplace learning. Age, gender, race, social class, educational attainment and family responsibilities impact on their ability to take advantage of learning opportunities at work and those available outside work which can contribute to career progression. Some groups are self-confident and are able to draw on the support of their colleagues and families, whilst others experience multiple barriers to combining work and learning and can feel isolated and unsupported with the problem. The research methodology did not allow an exploration of issues concerning literacy and numeracy at work: staff with literacy problems would have encountered difficulties in completing the employees' learning experiences questionnaire and are unlikely to have been selected by trainers and line managers for face-to-face interviews. We suspect that low literacy levels and problems with written English (as opposed to literacy in other languages) may have been behind the low response rates to the survey, but also appreciate that the identification of literacy problems at work can be extremely threatening.

In the fieldwork we came across many different types of learning at work. Some have been opportunities created by managers, others jointly through the development review process, or through a partnership between the union and the employer. They have also been initiated by employees themselves. They could be characterised in the following way:

- learning within the job and ‘doing the job better’
- learning to understand the job - examples here would include workers who were interested in studying educational courses that were related to their jobs
- learning for job progression - this is linked to the existence of career progression opportunities and, in some cases, the creation of new career routes
- learning around the job by extending knowledge of the section or department - this is closely linked to job design and ‘expanding into contiguous areas’
- learning for employability - employees acquire work-related skills which make them potentially more marketable externally
- learning for personal development - employees improve their general education. This contributes primarily to personal growth and self-confidence, which may have benefits in the work environment as well
- learning for democratic participation in the 21st century - many employees perceived a need to acquire IT skills and the ability to use computers and this was not just related to the work environment

It is important to emphasise that the questions ‘who initiates?’ and ‘who benefits?’ are fundamental to the ways in which these methods of learning are perceived and experienced. Indeed, the ability of staff to take advantage of learning opportunities may well be constrained by job design, shift patterns and how they relate to family responsibilities, staffing levels, tight budgets and the fact of operating within a stationary or contracting service.

The introduction of development reviewing for staff on these grades is a significant innovation. Where there is a potential for job progression and associated learning opportunities, it is clearly a useful tool. However, if development opportunities are to be identified for all staff, they are dependent on there being something - in relation to the job or in relation to learning - to which they can progress. On many occasions staff pointed out that they had been refused development opportunities because they were not required to do the job and herein lies the fundamental contradiction of development reviewing.

In the same way, the question of the resourcing of training and development in the public sector raises fundamental questions about the financing of workplace learning more generally and in particular questions about ‘who pays?’ and ‘who benefits?’ Especially where the public sector is in competition with the private sector for the delivery of public services the issue of fair contribution to the costs of investment in Human Resources is sharply posed. Some our examples suggest that these questions are also posed in occupations where there is an overlap between different parts of the public sector, for example, between care work in the health service and in the social services; and between departments within local authorities. Equally, the devolution of budgets to small business units within the public sector may result in a loss of flexibility in terms of the ability to provide cover for different parts of the same service. Moreover, it may threaten centralised training resources and expertise. It is clear that developments such as ‘Best Value’ and ‘Working Together’ which would appear to support investment in Human Resources in the public sector, may be undermined by other developments, such as ‘Fair Funding’ for schools and the Private Finance Initiative, which appear to pull in the opposite direction.

The funding of training and development for those in work raises questions about financial and other resources for training, cover and release from work. Whilst many professionals enter employment in the public sector with the expectation that they have an entitlement to them, this is not the situation for staff on the lowest grades. Resource constraints mean that a concept of entitlement to learning opportunities and to release from work that is generalised across the workforce will be dependent on some imaginative solutions. These will need to draw on the full range of learning resources and experiences present in the workplace alongside those resources which can be drawn down from elsewhere.

Some extremely innovative developments were identified in the case study organisations in which there were opportunities for career progression and job enrichment. This was particularly the case for staff working in care roles. However, in many of the jobs investigated management relied on prior experience, informal learning on-the-job and the willingness of staff to attend training in their own time and often fund it themselves. For a range of reasons many people are taking jobs for which they are over qualified. What becomes clear is that on the one hand there is not a simple lack of skills in the public sector, while on the other attitudes to learning are significantly affected by the organisation of work. The reality for many manual and routine clerical staff appears to remain one of limited opportunities for workplace learning.

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