

**UNION MODERNISATION FUND –
ROUND 2**

**UNISON : Establishing equality
reps**

Case Study written by : UNISON

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ESTABLISHING EQUALITY REPS

Background

UNISON has had equality-related roles for branch, regional and national representatives for many years and has a democratic structure that encourages and supports self organisation across five equality strands: Disabled members, Black members, LGBT members, Women, Young members and retired members. The training we provide for all our representatives incorporates awareness of equality issues. We lead the way on good equality practice amongst British Trade Unions and played a key part in the initial conception of the role of Equality Rep. Liz Snape, our head of Policy, sat on the Women and Work Commission 2006, which looked at how best to improve women's equality in the workplace. One of the commissions' key recommendations was the establishment of Trade Union Equality Reps.

UNISON recognised the value of establishing an equality-specific role based in the workplace, but growing demands on the union's training resources and commitments to existing programmes for the subsequent two years, (including an extensive programme linked to the Equality Strategy) resulted in capacity being stretched to the limit. We realised that to effectively introduce Equality Reps a high level of input would be necessary over a concentrated period of time, however, organisational change processes are resource intensive and time consuming. Additional funding from the UMF allowed UNISON to use its resources to embed change and sustain it into the future whilst still having the short term resources available to make a

significant and measurable impact in the early stages. This opportunity to provide early impact evidence of change has helped embed the role and is now sustaining the longer term process.

Our approach

Our project focussed on capacity building to support training and development for Equality Representatives to consolidate and capitalise on UNISON's existing equality work. As a public service union, we saw that new equality rights at work and the public sector equality duties provided opportunities, in partnership with employers, for Equality Reps to play a significant role.

Achieving transformational cultural change is a long-term project so the project aimed to provide the platform from which this work could be incorporated into UNISON's day to day working practices and continue long term.

Our Objectives

- Branch Equality Officer role reviewed and revised to take on co-ordinating role
- New training programmes for Branch Equality Officers and Equality Reps rolled out to all UNISON branches
- Inclusion of Equality Reps in the UNISON Rule Book and Code of Good Branch Practice with appropriate UNISON accreditation and recognition
- Training programmes developed and in place as part of our on-going national and regional training and development programmes for activists and staff
- Training/awareness raising programme for branches on new role of Equality Reps completed to ensure support mechanisms in place for Equality Reps at local level
- Case studies of activity in Regions and Branches with a range of employers to inform development of a model for change and demonstrating best practice
- Increased participation in union activity
- Publicity in UNISON newsletters and specific leaflets on the role of equality reps
- Handbook for Equality Reps published

The impact of the funding on UNISON

Whilst UNISON is a large and comparatively well resourced union, in order to achieve a significant change quickly, a high level of input was necessary. Organisational change

processes are resource intensive and time consuming: the additional funding from the UMF allowed UNISON to use its resources to embed change far more swiftly than would otherwise have been possible.

UNISON is an organisation that must meet changing demands and therefore often has changing priorities, it was incredibly useful to have resources ring-fenced for this project. The public funding aspect meant that we were able to resist expanding, changing or curtailing the objectives of the project.

Having the resources available for this project made a significant and measurable impact and gave us the opportunity to provide early evidence of the positive impact that Equality Reps make in the workplace. This has helped with embedding and sustaining the longer term process of integrating the role of Equality Rep into UNISON.

Defining the role of the UNISON Equality Rep.

To define role that Equality Reps should have in UNISON we consulted with a range of internal stakeholders, including: our national Self Organised Group (SOG) committees (Disabled members, Black members, LGBT members, Women, Young members and Retired members), Service Group Executives for each sector we represent, regional and national staff with responsibility for equalities and national staff from service groups. The consultation led to a number of key decisions about the role.

Colleagues from our member participation unit had researched UMF 1 projects on

ESTABLISHING EQUALITY REPS

Equality Reps in other unions and found that these Equality Reps had been overloaded with casework by their branches. This was a problem on three counts: it was far too complex and stressful for new reps, it prevented them from taking a strategic approach to tackling inequality and it gave their branch a way to sideline equality issues. Therefore we decided that UNISON Equality Reps should not have casework as part of their role. Of course if they were a steward as well, then they would be carrying out casework as part of those steward duties. The benefits were felt to be that the role would be more appealing to non-active members, that training could prepare a new activist within three days (not possible if casework were to be included) and enable a broader, more strategic approach to tackling inequality in partnership with the employer.

Members of the SOG committees, many of whom are Branch Equality Officers, were concerned with how Equality Reps would fit into branch structures and how they related to the branch equality role. There already exists a structure for other branch officers and reps to work together, for instance Branch Health and Safety Officers co-ordinate workplace Health and Safety reps in most of our branches, so we replicated this, making it clear that the Branch Equality Officers had a co-ordinating role with Equality Reps in their branch. We were explicit in the official outline of the role that Equality Reps were to work with the Branch Equality Officer.

Other parts of the consultation process led to these aspects of the role:

- To work with the Branch Equality Officer to advocate for good equality

practices in the workplace, across equality strands.

- To work with the Branch Equality Officer to support UNISON's Equality Scheme and advocate for good equality practices in the branch.
- To raise awareness within the workplace of the work the union and the branch does around equality.
- To work with the Branch Equality Officer to support branch negotiators by identifying and analysing information about the employer's equality performance
- To encourage the branch to prioritise equality by e.g. raising issues at branch meetings. To advise members on equality. To assist the branch and the Branch Equality Officer in organising around equality.
- To identify instances of good and bad equalities practice within their workplace.
- To signpost members with potential equality related cases to appropriate stewards or branch officers
- To undertake training on sector specific equalities legislation such as:
 - The Equality Duties
 - Single Status
 - Agenda for Change
 - The Knowledge and Skills Framework
- To liaise with branch SOGs

In effect there are two main aspects to the role – the core part is to respond to problems in the Rep's own workplace, the broader part is to work with other

members of the branch to improve the branch's own equality practices and to help take a strategic approach to tackling inequality across all the workplaces the branch covers.

Developing Training for UNISON Equality Reps

For practical reasons we decided to make the Equality Reps training three days long. This meant it was the same length as the TUC training and would qualify for the same funding, it is the same length as the Union learning reps course and the initial stewards training and is often the longest amount of time that members can get paid time for training. The length of the course immediately gave rise to the first and most difficult challenge in designing the training for UNISON Equality Reps. Equality Legislation and concepts of Equality could in themselves take years of study to fully get to grips with, so delivering something meaningful and useful in three days meant making difficult decisions about what not to include. We also knew that members would be a mix of experienced and completely new reps, so the course would need to deliver something for both groups. We needed to make sure that the course provided opportunities to learn skills that could be applied immediately in the workplace and were not too theoretical or overwhelming, both of which we believed would lead to lack of concrete actions being taken by the reps after the course. The last challenge was to model the concepts through the delivery by making it as inclusive as possible. In short the aims were to make it useful, inclusive, interesting and inspiring.

We advertised the course as being for members who were interested in 'fairness at work'. This was designed to encourage as many as possible to apply, but of course the concepts people have of fairness in general and equality as we would see it in UNISON and in the law can be quite far apart. The course was designed to take the member on a journey from an interest in 'fairness at work' through an awareness of what discrimination exists, an understanding of different types of discrimination, key concepts, legislative tool and finally how to put all this together to make a difference on their workplace. There was a clear three part structure to the course. Day one raised awareness, introduced concepts, and explained where and how these related to their role and the union as a whole. Day two covered legislative tools. Day three gave exercises in applying the previous two days' work in the branch and the workplace.

We were unable to use most of the TUC's Equality Reps course for two reasons: the TUC course covered coursework in some detail and did not cover the public sector equality duties in much detail. As noted above, our reps were not given casework as part of the role and as most of our members are covered by the public sector equality duties these were necessarily a core part of our course. However, the TUC Equality Rep project manager was extremely helpful throughout the project and one of the resources from the TUC course was incorporated into an activity in our course.

Update training for Branch Equality Officers

The role of the Branch Equality Officer was established in 1993. The range and

complexity of the tasks now facing local branches in UNISON in respect of new rights at work and the duty on employers to promote equality is changing. In addition, the role was developed at a time when most UNISON Branches dealt with a single employer. This is no longer the case. The shape of delivery of public services has changed. Services, along with increasing numbers of members in the public services, have been out-sourced to arms length organisations or contractors and local branches are dealing with multiple employers across a large geographical area. This project focuses on organisational change to introduce the role of Equality Reps as set out in the UMF priority theme of capacity building to support the training and development of equality reps. It is envisaged that there will be multiple Equality Reps in a branch representing members in a range of employers. The Branch Equality Officer will, therefore, have a new co-ordinating role.

UNISON already has Branch Equality Officers in place. Their role would change to become 'team leaders' working with groups of workplace Equality Reps across the union. This will require development of a new revised training programme for Branch Equality Officers, and a new programme of training for Equality Reps. The project will aid development of a strengthened team approach to tackling equality issues at local level. In this way the role of equality reps will be integrated with the day to day working of the local branch with existing mechanisms for accountability and representation in place. Experience of introducing the role of Union Learning Rep has taught us that to successfully integrate a new role such as this a great deal of preparatory work is

required with existing branch organisation to ensure the roles are understood and appropriate facilities and support provided.

Pilots

In order to assess the role, the training, and to explore how regional staff and branches would support this new role, we ran pilots in three of our twelve regions: Wales/Cymru, Northern and South West. In each of these regions, the women's or the equality officers (paid UNISON staff) led on the project. Agreement was first reached with each Regional Secretary to allow time and resources to be spent on the project. The project manager developed close working relationships with each regional project lead. Within each region we originally agreed to aim for 10 pilot branches where we would recruit one or two Equality Reps, gain the support of the Branch Equality Officer (where there was one) and support the Equality Reps after training to carry out their role.

Each region took a different approach to identifying target branches: The south west region invited specific branches to take part in the pilot based on their assessment of which branches would work well and be positive about the project. The northern region set up a briefing session and invited all the branches in the region to send a member or activist to attend. The Welsh region invited all branch secretaries and branch equality officers to take part. The Northern region approach generated more Equality Reps, but from fewer branches. The Wales and South west approaches were fairly equal in their effectiveness. The overall result was that a total of twenty six branches participated in the pilots.

As this was a few short of our original target we discussed what the aim of the target was with our BIS officer – he clarified that they were looking for a good spread across different workplaces and sectors. The original target of thirty was meant to cover thirty workplaces and employers. As our branches usually cover many workplaces and employers, we in fact covered many more than thirty workplaces and employers with our twenty six pilot branches. The target was therefore adjusted to reflect this.

The regular project board meetings provided a good structure for the regional leads to report to and stay engaged with the project. Video-conferencing helped in this immensely as each pilot region was fairly distant from our head office in London. The project board meetings gave us a way to both support and monitor the pilots.

Further support was provided by our Member Participation Unit (MPU) which established an equality e-bulletin that is now regularly sent to regional members of staff involved in equality and all equality-related activists with a current email address. MPU also developed the extremely valuable resource: 'A guide to equality in UNISON' (key resource for Equality Reps).

The Equality Reps handbook

The original project plan was to amend and re-brand and the TUC Equality Reps handbook for UNISON, however, our assumption that the TUC would be developing a handbook turned out to be mistaken. Therefore we developed one from our own resources with input from service groups and MPU. The handbook is now available to any branch to order

online, is used extensively throughout the union and provides useful information and links to our Equality Reps and others.

Publicity

UNISON is a very large organisation with many different priorities. High workloads and ongoing pressures for both staff and activists mean that new initiatives sometimes fail to take hold. Staff, activists and reps may receive a number of journals, newsletters and bulletins: this was both a blessing and a challenge for this project. We had a large number of channels through which to promote the new role, but as the recipients are often experiencing information overload, it was important that our message stood out. We took two approaches: we put out as much promotional as we could manage, on the basis that most people need to see something a number of times before it impinges on their consciousness and we also tried to make the messages unusual enough to stand out.

Possibly the most effective, and most labour-intensive, was the series of presentations, fringe meetings and workshops delivered through out the project by the project manager. Every regional staff conference received a briefing on the project, along with almost all the national and regional committees and conferences and a head office lunchtime staff seminar. Hundreds of staff and members were briefed this way and again the approach was as much saturation as possible and an unusual approach. The approach included a powerpoint with an animated snail demonstrating the 'snail's pace' of progress on various equality issues. The project manager came up with this idea but was anxious that it might be seen as

trivialising the issues, however it was very well received. We believe the approach paid off because people were not expecting to be entertained.

Towards the end of the project we decided that we wanted to produce something that could continue to promote the role after the project ended. Thinking more on the exploration of using unusual methods of communication we commissioned a short animated film to illustrate the role and inspire more members to become Equality Reps. The 'Cogs' film was loosely based on our Equality Reps 'ident' of different shapes and colours of cogs working together. The film was very well received and can be see here:

<http://www.unison.org.uk/video/video.asp?did=11698> (signed and subtitled version)

<http://www.unison.org.uk/video/video.asp?did=10858> (without signs and subtitles)

Key Outputs

Equality Reps have been working in partnership with employers in a number of ways and have reported a positive response from their employers where this has been possible. The role has introduced a new way of thinking about how branches engaged with employers on equality issues. A more far-sighted and longer reaching approach was developed, working in partnership with receptive employers. Evidence for this approach comes from a number of examples: One employer reported that they had been consulted on the Single Equality Scheme and on race equality and bullying and harassment and suggested that the role 'brings a workforce perspective to discussions plus advocacy'. Another

employer saw the role of Equality Reps as 'supporting, challenging and working with the company to improve equality and diversity policy and practice, both for our employees and our customers'. Equality Reps sitting on employer equality forums. An Equality Rep worked with the employer's Equality and Diversity officer 'to produce a matrix to identify arrears on equality issues'. Another Equality Rep was involved in discussions on the equality and diversity policy and strategy as well as taking an active role in looking at Information Advice and Guidance (IAG) and the social mobility agenda. Equality reps have demonstrated a form of partnership working which takes a more strategic approach to tackling equality issues than branches have traditionally followed. This transformation represents a result that meets the original objective.

As described above, UNISON already had a wide range of existing structures for addressing equality issues, however these were focussed at branch, regional and national level. The new role enabled equality issues to be addressed more effectively within the workplace and information from the union to the workplace on equality was immediately strengthened by the introduction of workplace Equality Reps. Branches and regions also gained from better information on workplace equality issues.

The majority of pilot branches included at least two Equality Reps or an Equality Rep and a BEO working as an equality team. This team approach worked well to support change. Regional UNISON staff set up Equality networks for members in the pilot regions, which Equality Reps and other activists found very useful. At the beginning of the pilots, many Equality

Reps were not aware of their branch's current practice on working with employers round equality issues – sometimes because there was none. During the project Equality Reps demonstrated a number of ways, both formally and informally of working with employers. Ongoing publicity and campaigning on the role delivered a very high level of awareness of the new role.

The role 'job description' was developed through consultation with key internal stakeholders and then further developed through the pilot. We surveyed the pilot branches to find out what their current relationship was for engaging around equality issues and delivered training for both Equality Reps and Branch Equality Officers (as described above).

The project was able to reach almost all parts of the union, transforming the way both activists and staff thought about the way in which we tackle equality issues. All regions apart from Scotland were briefed on the role and models of working (e.g. Branch Equality Teams). All branches were briefed through regional network days, articles and news on the website. All national SOGs were briefed by project manager each year and regional and branch SOGs briefed in their newsletters. Briefings were delivered at conferences, regional & sectoral events alongside the ongoing publicity campaign.

By the end of the project the majority of regions have a member of staff leading on the project and training and supporting Equality Reps is in their work-plans.

The rule change to include Equality Reps was proposed at UNISON National Conference 2009 but was not heard as

time ran out. The rule change was put again in 2010 and passed.

A total of 26 branches participated in the pilot – 57 Equality Reps were trained from local government, health, energy and police support service groups. The 57 Equality Reps came from 40 different workplaces

Unexpected benefits

There was some concern at the start of the project that introducing a new equality role might lower the number of members taking up existing equality-related branch roles as members chose to become Equality Reps instead. One of the unexpected benefits was to find the opposite effect. In fact every equality-related UNISON role showed a significant increase in the year 2009, which correlates with the timing of project's campaign. Although this is part of a general trend the increase was higher than in previous years. Please see attached document 'equality officers training charts 05 – 09' for these figures broken down and represented in a number of ways.

Whilst we could not say for certain that this project caused this correlated rise, we can certainly show that it did not have a negative effect.

Lessons learned

Key lessons learned were that building relationships across the union was the most effective way of making sure the message was heard above competing priorities and campaigns. Some other UNISON projects have relied on big launches which make a big initial impact, but without a sustained approach to

communication this impact drops off very quickly. It also leads to some cynicism within the union about 'flavour of the month' projects. Sustained promotion and engagement through presentations and workshops kept the role of the Equality Rep on the agenda across the union throughout the project.

The other important lesson was that taking a more unusual approach to both communication and education paid dividends in engaging members and staff with the project.

What we would do differently?

There were a number of difficulties with the accounting systems and the method of match funding which was highly bureaucratic, next time we would develop a far simpler system.

What we found helpful

The project management process, whilst sometimes feeling a little cumbersome, was excellent for stemming 'mission creep' whilst allowing flexibility in delivery. The project board meetings gave a structure for the project and provided a supportive forum to those leading on the project.

Recommendations

The final project board made the following recommendations: Make sure each region has named lead for Equality Reps. Set up a discussion forum for equality reps on the new website.

Time-off for new activists needs to be taken into account when scheduling the courses; where training has been held in

branches around existing branch events it appears to have proved successful;

Timely follow-up to the training is crucial and there needs to be clarity as to how this will be done and who will be doing it, as well as the time-scale. New Equality Reps need to be supported and engaged following the training;

There is some evidence that employers are not aware that there are Equality Reps in their organisations, although they may be negotiating with other union reps over equalities – in extending the project engagement with employers needs to be addressed;

UNISON may want to encourage new Equality Reps to go on shop steward training courses at some stage

In terms of longer term regional and national support Equality Reps wanted further training and information, particularly legislative updates;

Regional officers stressed the need to go beyond consultation and emphasised the use of equalities as a negotiating and bargaining tool;

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