



TUC Equality Reps Project Extension Report

April 2009 - December 2009

Contents

Summary

Background

Rationale

Aims and objectives

Work of the project

Training and developing equality reps

Sharing good practice

Role of a union equality rep

Monitoring and evaluation

Key points from the survey

Key points from case study employers

Key points from WERS analysis

Outcomes

Future Developments

Appendix 1 – TUC Union Equality Representatives Survey 2009: final report – Nicholas Bacon and Kim Hoque

Appendix 2 – Unions and Workplace Equality: evidence from 2004 Workplace Employment Relations Survey – Kim Hoque and Nicholas Bacon

Appendix 3 – Employers and Equality – an Interim List

Summary

This report outlines the work of the TUC's Equality Reps Project Extension which is funded jointly by the TUC and the Government Equalities Office (GEO). This project is an extension of the TUC's Union Modernisation Fund (UMF) Round 2 project to Train and Evaluate Union Equality Representatives.

The TUC had argued in its submission to the Women and Work Commission in 2005 for trade union equality representatives (reps) to be given statutory rights. The Commission did not support this proposal at that time but did recommend that the Government's Union Modernisation Fund should specifically allocate funding to support the development of union equality reps. The Commission suggested that if this were to be successful the case for statutory rights would be much stronger. Subsequently the UMF did allocate funding to a number of union equality rep programmes as indicated below.

The last four years have seen a range of capacity- building projects through the UMF for the training and development of union equality reps. The TUC project, through TUC Education, has trained four hundred equality reps and contributed to affiliated unions reps' training for the new role.

The project has organised and run a group with the other seven UMF equality rep projects to share ideas and good practice. The unions that had projects were Unite, Unison, PCS, NUT, Prospect, TSSA and Connect/GFTU.

An external evaluation was conducted with the three hundred and twenty reps who had undergone training up to September 2009. This showed that trained equality reps were active in public and private sector workplaces in Great Britain and that eighty one per cent of them had positively impacted on some aspect of their employer's equality practice. A key factor in their effectiveness was the amount of time they were able to spend on their duties. There is employer support for the role, as forty nine percent of their employers paid them for more than one hour per week for this role. In the evaluation there are four case studies with interviews with employers and equality reps. The employers express support for the business case for time off for union equality reps.

The TUC is continuing to press for statutory rights for union equality representatives through its lobbying and campaigning work around the Equality Bill. The evidence gathered during the duration of the funded projects demonstrates clearly that if equality reps are not given paid time off they are much less effective at doing their jobs. Giving statutory rights to ULRs made a big difference to their effectiveness; similarly, giving statutory rights to union equality reps would greatly enhance their effectiveness.

Background

This project is an extension of the TUC Union Modernisation Fund (UMF) a one year Equality Reps project that finished in March 2009. The original project produced a three day training course for equality reps that was delivered in Great Britain by TUC Education, both in classrooms and online. Twenty one TUC tutors were trained to deliver the new course and by April 2009, these tutors had trained two hundred and twenty equality reps. The classroom and online courses are now part of TUC Education's core programme and the course continues to recruit. As part of the project, TUC policy officers raised awareness of the role of equality reps and the new Equality Bill by running eight regional seminars for two hundred and seven union officers.

In the UMF Round 2, eight projects were eventually approved that were concerned with the training and development of equality reps. The majority of these projects will be completed by April 2010. In order to share good practice, the TUC project co-ordinator set up an equality reps project group comprising the other union UMF equality rep project co-ordinators.

The TUC UMF project commissioned an independent external consultant to conduct an initial evaluation of the training and the impact that equality reps were making. The evaluation showed that the training was successful and that a high proportion of participants had carried out activities at work as a result of the course. The majority of these trained equality reps were able to report some success.

A conference was held in February 2009 to showcase the work of the project, at which Harriet Harman, Minister of Women and Equalities, was the keynote speaker. The event was attended by one hundred and sixty six reps and officers.

The full report of the work of the project with the initial evaluation report is available from the TUC website in the Documents section of the Equality area. The report was uploaded on 15th June 2009. The original report and this one should be read together for a complete understanding of the TUC's work on equality reps.

Rationale

The TUC believes that equality reps are uniquely placed to promote fairness in the workplace, firstly by raising the equality agenda among fellow workers and their own unions, secondly by encouraging employers to make equality and diversity part of mainstream collective bargaining and thirdly by working with vulnerable workers and trying to ensure that every worker receives fair treatment irrespective of gender, race, disability, religion, age, gender reassignment or sexuality.

Once equality reps are properly trained and established, they will have a real preventative role to play in the workplace. They will be able to look at employers' policies, procedures and systems in terms of equality with a view to preventing some individual tribunal cases as well as current inequalities.

The TUC UMF Equality Rep project was successful and clearly met its objectives. As the project only ran for one year, the initial evaluation could only survey ninety seven trained

reps and some of those had only been trained for a few weeks, which limited their ability to effect any changes.

Another key role of the project was to co-ordinate the other union equality rep projects and to include some of the work of their equality reps in the evaluation. Due to the varying start dates and lengths of the other union projects, the original TUC project would finish before most of the other projects had been completed. The Government Equalities Office (GEO) funded, on a matched funding basis, a nine month extension for the project in order that the training could be embedded and a more accurate and detailed evaluation could be conducted of the effect of having equality reps in the workplace.

Aims and Objectives

The project started in April 2009 and ran for nine months. Its aims were to continue the valuable work of the first year and to conduct a more detailed evaluation of the impact equality reps were making in the workplace. This evaluation aimed to illustrate the valuable work that these new reps were doing and provide evidence to make the case to government for statutory rights for equality reps. These aims translate into the following objectives:

- Commission and supervise an external evaluation that would include the online courses and the extra two terms of TUC trained equality reps. This would be 300 + reps as opposed to the 120 surveyed in the first project and would give a more realistic view of the impact that the reps were having.
- Co-ordinate the equality rep project group, share good practice and assess the impact that the other seven projects are making in the workplace.
- Develop additional training materials and resources to support the demanding role of equality reps. The evaluation from the first project indicated that they needed more training to deal with the complexity of the role.

Work of the Project

Training and Developing Equality Reps

The three day TUC equality reps course focuses on the collective approach to equality and what is happening in reps' own workplaces. The course covers an outline of the discrimination law framework, key legal concepts and the content of their own union structures. They are encouraged to study their own employer's policies, to map their workplace from an equality perspective, identify key issues and get others' support for making the case for equality. This course is now embedded in the TUC education programme and is run throughout the regions, Scotland and Wales. The first online course started in January 2009 and five online courses have run in 2009.

The range of equality issues that reps have to deal with is complex and the three day course is only an introduction. In the evaluation of the first project, the reps identified the need for further training to deal with the role effectively. A residential workshop was held for nine TUC tutors who had taught the equality reps course, to review the course and the future training needs of equality reps. The workshop produced ideas for a TUC Equality

Diploma. As a result of the workshop, the project co-ordinator has written the syllabus and units for this course which will be developed by TUC Education at a future date.

There are currently three TUC Diplomas in Health and Safety, Employment Law and Contemporary Trade Unionism that are accredited by the Qualifications and Curriculum Framework (QCF). These are 36 week courses where reps can gain up to 48 credits at level 2 and 3, and can fulfil University degree entrance requirements. An Equality Diploma would provide progression and the academic knowledge of equality issues needed by an equality rep. These Diplomas can also be studied online and there has been interest from union full time officers in this new qualification as it would enable them to update their knowledge in this complex and changing area.

The Chartered Society of Physiotherapists (CSP) ran a course using the TUC materials for their reps during the first project. This was enthusiastically received and consequently they used the materials to run a national training programme for all of their union reps to update them on equality issues.

Sharing Good Practice

In order to share good practice and provide a forum for ideas, the TUC project set up an equality rep project group in the summer of 2008 which continued throughout 2009. There were seven other union equality rep projects. These were Unite, Unison, NUT, PCS, Prospect, TSSA and Connect/GFTU. The group created a network between project co-ordinators which enabled us to share ideas, keep up to date with developments in particular unions and comment on policies and training materials.

As a result of the work of the group, the TUC project co-ordinator was co-opted onto the Unite team, which reviewed their materials and co-tutored their pilot tutor training. The co-ordinator also co-tutored the first Unite equality reps summer school held in Durham in July 2009. The summer school trained fifty eight equality reps.

Role of a Union Equality Rep

There is growing evidence from the initial evaluation of the first project as well as union experience that a lack of facility time is a significant barrier to the effectiveness of union equality representatives. The TUC and others seek to address this by giving union equality reps similar rights to other reps, for example union learning reps. If legislation is to be amended to give equality reps statutory rights then the role needs to be clearly defined. The current position is that there are different union approaches. In some unions the role will be largely a campaigning, support or championing role whereas others intend equality reps to be full members of the negotiating team.

The TUC in consultation with affiliate unions and the GEO propose that

A trade union equality representative has been defined as a representative of an independent trade union who, in workplaces where independent trade unions are recognised for collective bargaining purposes:

- Has been appointed or elected by their union in accordance with the union's rules to take on the role and;
- Has been or intends to go through training approved by the TUC or their independent trade union to carry out the role.

Equality representatives perform some or all of the following functions in the workplace:

- Provide information and advice about equality matters to individual members
- Represent employees on equality issues
- Help promote the value of equality in the workplace
- Help employees to achieve a more equitable work-life balance
- Assist with monitoring and assessing the impact of employment policies on different groups to ensure that no discrimination arises or steps can be taken to avoid discrimination arising
- Work in partnership with employers to develop policies and practices that will reduce the risk of discrimination cases being taken and ensure that the workplace is fair and inclusive
- Facilitate consultation and employee involvement on equality matters, helping build consensus
- Support other union representatives and advise on any equality matters that arise in collective bargaining with the employer.

Monitoring and Evaluation

The work of the project was overseen by a steering committee that met quarterly. Members of the steering committee included GEO, TUC Equality and Employment Rights Department (EERD) and TUC Education staff. Monthly reports of the project's work were sent to the GEO.

A key aim of the project was to conduct an independent external evaluation of the impact that equality reps were having at work. An invitation to tender for the evaluation was advertised on the TUC and Unionlearn websites. Thirty four tenders were received and the successful tender was selected by a panel of staff from the TUC and GEO. The winning tender was submitted by Professor Nicholas Bacon and Professor Kim Hoque of Nottingham University Business School.

The evaluation was conducted in September and October 2009 and details of the three hundred and twenty TUC trained reps were given to the researchers to survey. The evaluation had two parts, a survey of trained equality reps and four case studies selected from a variety of unions, sectors and geographical areas where both the equality rep and their employer were interviewed by the researchers.

The survey aimed to find out:

- Who equality reps were and where they worked
- What factors influence the effectiveness of equality reps
- The extent to which equality reps have influenced employers' policies and practices
- What factors help equality reps to influence their employers' policies

Unison, Unite and PCS circulated the survey to their trained equality reps and encouraged them to complete the survey. Two hundred and sixty one completed surveys were received

by the researchers.

The TUC and the GEO wanted the evaluation to go beyond the views of equality reps and to include the employer voice. It was decided that the best way to do this would be by compiling four varied case studies where both the equality rep and the employer were interviewed by the researchers. The following four case studies were selected:

- GMB and the Highways department of Walsall Council
- Unite and the Principality Building society in Cardiff
- Unison and the Betsi Cadwaladar Health Board in Wales
- Unite and the Ineos oil refinery at Grangemouth, Scotland

In addition, the project commissioned from the Nottingham researchers an analysis of the 2004 Workplace Employment Relations Survey (WERS) to gauge whether the presence of union reps and whether they have bargaining or consultation rights affects the level of adoption of equality policies and practices by the employer.

Key Points from the Survey

Who are equality reps?

- 81% are white, 46% are female, 18% are new activists, 85% hold another union role

Where do they work?

- 65% work in the public sector, 32% in the private sector, 3% in the voluntary sector
- 63% work in organisations of 5,000 plus, 36% are in organisations of 1,000 plus

How much time are they spending on their activities?

- 65% are spending more than 1 hour per week, 41% are spending more than 2 hours per week
- 49% report their employers usually pay them for more than 1 hour per week
- 32% spend more time on their duties than paid for by the employer

Impact on employer practices

- 81% have had an impact on employer equality practices, this includes 40% who have made improvements to flexible working practices
- Private sector reps are just as likely as public sector reps to influence employer practice

Key factors that influence their effectiveness on improving equality practices

- Amount of time spent on the role
- Regular discussions between managers and reps
- The existence of an equality forum or committee
- The employer negotiates with the union on equality

Comments from the Case Study Employers

- Grievances are more likely to be resolved informally when the equality rep is involved
- In a competitive environment equality issues will be more important and enable us to get the most capable people into the organisation
- As a result of the training introduced by the equality rep, bullying cases have gone down which has reduced stress related absenteeism and lowered sickness levels
- Attitudes and behaviours have changed which has improved worker morale and retention

For the full evaluation report of the survey and the case studies see Appendix 1

Key Points from WERS 2004 Analysis

- Employer equality practice is higher in workplaces with union recognition
- Good equality practices are far more prevalent where the employer negotiates (rather than consults) with the union over equality matters

For the full analysis of the 2004 WERS survey see Appendix 2

Outcomes

The most significant outcome of the project is that the external evaluation has shown that there are growing numbers of trained union equality reps in British workplaces performing their role with vigour and employer support. Eighty one per cent of union equality reps are influencing employer equality practice.

For an interim list of employers who have equality reps see Appendix 3

According to the four case study employers, there are clear business benefits to be generated from the activity of equality reps. These include improved workforce morale, improved recruitment and retention, higher productivity and reduced tribunal costs.

The project has trained four hundred union equality reps through TUC Education and the course is part of their core programme and will be sustainable beyond the life of the project. The syllabus and units for a TUC Equality Diploma have been written to provide future progression in training for equality reps.

Future Developments

The other UMF equality rep projects are scheduled to finish by March 2010. Many of them are developing and training union equality reps and it is estimated that by March 2010 there will be 1,400 trained equality reps in Great Britain. The training materials and expertise generated by the project will ensure that union equality reps will continue to be trained.

Appendix 1

TUC Union Equality Representatives Survey 2009: final report

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Introduction

This report presents the findings from the 2009 TUC Survey of Union Equality Reps. The report seeks to address the following issues. First, it seeks to identify equality rep demographic characteristics, and the type of workplaces equality reps are located within. Second, it seeks to identify a range of factors that have the potential to influence equality rep effectiveness, particularly in relation to the activities equality reps engage in, the support they receive and their role characteristics. Third, the report seeks to estimate the extent to which equality reps have been successful in terms of influencing employer equality policy. Fourth, it seeks to identify the factors that are associated with the ability of equality reps to influence employer equality practices positively. Finally, it presents four case studies of organisations with equality reps and the views managers express about the contribution equality reps have made to business performance.

Survey Details

The survey was sent to all equality reps on the TUC database of reps that had undertaken TUC equality rep training. In total, 282 surveys were sent to reps via this route. In addition, surveys were also sent out by Unite and PCS to their own equality reps. The survey was sent out in September 2009 with reminders being sent during October 2009. In total, 261 responses were received (a response rate of 45 per cent), of which 225 are used in this report¹. The survey was designed and analysed by Nicolas Bacon and Kim Hoque from Nottingham University Business School. We would all like to thank all the reps who were able to complete the survey and those in trade unions who encouraged reps to complete the surveys.

Equality Representatives' demographic and workplace characteristics

The characteristics of equality reps are somewhat different from those of other union reps in several respects. In particular, equality reps are more likely than other union reps to be from an ethnic minority. Overall, 81 per cent of equality reps are white, 7 per cent have an Asian or Asian British background, 9 per cent a black or black British background, 2 per cent a mixed background and 0.5 per cent a Chinese background. Less than half (46 per cent) of equality reps are female, which is perhaps unsurprising given that the role is being played largely by reps in established roles (see below). It is notable though that 63 per cent of the equality reps that have not had prior rep experiences are female, suggesting the role is playing a part in attracting more women into union representation. The average age of equality reps completing the survey is 47 years old. The youngest equality rep in the survey is 22 years old, while the oldest is 68 years old. There is no evidence that the effectiveness of equality reps varies by age.

In terms of the types of workplace in which equality reps are found, 65 per cent of equality reps are located in the public sector, 32 per cent are located in the private sector and 3 per cent are located in the not-for-profit/ voluntary sector. A majority of equality reps (63 per cent) are located in large organisations with 5,000 or more employees, and 36 per cent are in workplaces with more than 1,000 employees. This suggests that equality reps have the scope to affect the working lives of large numbers of employees. Most equality reps (98 per cent) are in workplaces where their union is recognised for collective bargaining.

Potential influences on the ability of equality reps to perform the role effectively

This section of the report seeks to explore that factors that have the potential to influence the ability of equality reps to perform their role effectively. These factors are explored under three broad headings, the first being the activities in which equality reps engage, the second being the support they receive and the third being their characteristics.

Equality rep activity

A number of the activities equality reps engage in might influence their effectiveness. These might include: the number of hours per week equality reps spend on the role; whether they have been engaged in member and/ or employer-focused activity; the contact they have had with management to discuss equality issues; and whether negotiation or consultation over equality matters takes place.

a) Number of hours per week spent on equality rep activities

One might expect the amount of time equality reps spend performing the role to be a particularly important influence on their ability to perform the role effectively. Some equality reps are dedicating a large amount of time to the role, with nearly one-quarter of equality reps (23 per cent) usually spending more than five hours a week on equality rep activities (Table 1). Overall, two-fifths (41 per cent) are spending more than two hours a week, and almost two-thirds (65 per cent) are spending more than one hour a week on equality rep activities. Almost a quarter of equality reps (24 per cent) usually spend less than one hour a week on equality rep activities and more than one in ten (12 per cent) are unable to spend any time at all on equality rep activities. Statutory support could well help these reps to increase the amount of time unions are able to spend on promoting equality in their workplaces.

Table 1: Hours per week usually spent on equality representative activities, including both time spent at work or at home (percentages)

More than 10 hours per week	12
5 to less than 10 hours	11
2 to less than 5 hours	18
1 to less than 2 hours	24
Less than 1 hour	24
No time	12

One key factor that is likely to influence the hours per week equality reps spend on equality rep activity is whether employers usually pay them for the time they spend performing the role. More than one in ten equality reps (12 per cent) report that they are usually paid by their employer for more than ten hours per week spent on equality rep activities, suggesting some employers are providing significant backing for the equality rep role. Almost one-half (49 per cent) of equality reps report their employers usually pay for more than one hour per week of the time spent on performing their role. Over a third of equality reps (35 per cent), however, report that they are not usually paid by their employer for any of the time they spend on equality rep activities while at work (Table 2).

Table 2: Hours per week usually paid by the employer for the time spent on equality rep activities while at work (percentages)

More than 10 hours per week	12
5 to less than 10 hours	6
2 to less than 5 hours	13
1 to less than 2 hours	18
Less than 1 hour	17
No time	35

Almost one-third of equality reps (32 per cent) spend more time on their duties than paid for by their employer, suggesting that many employers may be benefiting from union activity on equality issues without contributing towards these activities.

b) Member and employer-focused equality rep activity

The survey assessed the activities equality reps are engaging in to help and support union members (member-focused activities), and also the activities they are engaging in to attempt to influence employer equality policy and practice (employer-focused activity). Overall, equality reps report high levels of activity in relation to their efforts to promote equality issues.

Turning first to member-focused activities, most equality reps (88 per cent) provided information/advice on equality to members and more than three-quarters (77 per cent) promoted good equality practice in the last year. Three-fifths (61 per cent) assisted employees with investigations of discrimination and harassment complaints and in making requests for flexible working, while almost three-fifths (59 per cent) investigated complaints by employees of discriminatory practices (Table 3). More than one-half (54 per cent) of reps reported they have represented workers suffering from discrimination or harassment in the past year.

Table 3: Equality rep member-focused activities in the workplace in the past year (percentages)

Providing information/advice on equality to members	88
Promoting good equality practice	77
Assisting employees with investigations of discrimination and harassment complaints	61
Assisting employees in making requests for flexible working	60
Investigating complaints by employees of discriminatory practices	59
Representing workers suffering discrimination or harassment	54
Assisting employees in making requests for parental leave	41
Supporting individuals bringing equal pay cases	16
Representing employees making discrimination claims at Tribunals	11

Where employer-focused activities are concerned, Table 4 shows that approximately one-half of equality reps in the past year have spent time encouraging their employer to develop practices to promote: gender equality (51 per cent of reps); race equality (48 per cent); disability equality (58 per cent), age equality (53 per cent); sexual orientation

equality (44 per cent) and religion and belief equality (44 per cent).

Table 4: Equality rep employer-focused activities in the workplace in the past year (percentages)

Equality rep has spent time encouraging their employer to develop practices to promote:

Gender equality	51
Race equality	48
Disability equality	58
Age equality	53
Sexual orientation equality	44
Religion and belief equality	44

A comparison of member-focused and employer-focused activities suggests that equality reps are more likely to be engaging in member-focused activity than employer-focused activity. Indeed, while 71 per cent of equality reps have engaged in both member and employer-focused activity over the past year, 22 per cent have engaged exclusively in member-focused activity, while only 1 per cent have engaged exclusively in employer-focused activity. The remaining 6 per cent have not focused on either form of activity (suggesting that the vast majority of equality reps are ‘active’). It is also possible to calculate the proportion of reps that are ‘single issue’ reps focusing on only one form of equality. The results suggest that the majority of reps are focusing on more than one equality strand, with only 9 per cent of reps being ‘single issue’ reps.

c) Contact with management and involvement in EO decision-making

A further equality rep activity that might influence their ability to impact on employer equality practice is the frequency with which they discuss equality issues with management. More than one-third (37 per cent) of equality reps report contact at least once a month with any level of management to discuss equality matters, and approximately one-half (51 per cent) have contact with management at least every three months. Many other equality reps report infrequent contact and in some cases no contact at all. Indeed, nearly one-third of equality reps (32 per cent) had no contact with any level of management to discuss equality matters during the last 12 months (Table 5).

Table 5: How often equality rep had contact with any level of management to discuss equality issues during the last 12 months (percentages)

Daily	7
At least once a week	14
At least once every two weeks	3
At least once a month	13
At least once every 3 months	14
At least once every 6 months	7
Once a year	9
Not at all	32

Another activity that might potentially affect the ability of equality reps to perform their role effectively is the extent to which unions are involved in decision-making over equality issues, particularly whether negotiation or consultation over equality issues occurs. As demonstrated by table 6, equality reps report that managers normally negotiate or consult when deciding equality issues in more than three-fifths of cases (62 per cent). However, managers do not involve union representatives at all on equality issues in over one-fifth of cases (22 per cent).

Table 6: Union involvement in management decisions on equality issues (percentages)

Negotiate with union representatives	26
Consult union representatives	36
Inform union representatives	16
Not involve union representatives at all	22

Support given to equality reps

One might expect the support given to equality reps by managers to be an important influence on the ability of equality reps to perform the role effectively. Given that, as discussed above, many equality reps report frequent contact with managers, and managers often involve union representatives in equality issues, it is perhaps not surprising that many equality reps feel managers in their workplaces either value the equality rep role or do not regard it as lacking in value. Three in ten equality reps (30 per cent) report managers at their workplace value their equality rep activities (Table 7) and a further 38 per cent report management do not regard their role as lacking in value. Only 32 per cent of equality reps report that managers do not value their equality rep activities, suggesting managerial opposition to the equality rep role will not hinder the work of a majority of reps.

Table 7: Do managers at the workplace value equality rep activities? (percentages)

Strongly agree	5
Agree	25
Neither agree nor disagree	38
Disagree	20
Strongly disagree	12

In addition, a number of specific elements of employer support might be important in determining whether equality reps are able to perform their role effectively. The remainder of this section evaluates the extent to which equality reps receive these elements of support.

a) Office facilities

A majority of equality reps report that employers provide them with sufficient facilities to conduct their role (Table 8). Employers provide sufficient office space to two-thirds of equality reps (66 per cent), and provide sufficient communication equipment to 80 per cent of equality reps.

Table 8: Employer provision of facilities to equality reps (percentages)

	Yes	No
Sufficient office space	66	34
Sufficient communication equipment (e.g. phone, email, internet)	80	20

b) Time off to perform the role

Where provision of time off to perform the equality rep role is concerned, many equality reps report employers do provide reasonable time off, suggesting significant management support for the equality rep role (Table 9). Approaching two-thirds of employers (64 per cent) provide equality reps with reasonable time off to perform the role, although more than one-third (36 per cent) of reps do not feel they receive reasonable time off. Employers also provide reasonable time off to undergo relevant equality rep training to four in five equality reps (80 per cent). However, a lower proportion of equality reps (only 40 per cent) have cover for their regular job or a reduced workload to enable them to conduct the equality rep role.

Table 9: Time off employers provide equality reps (percentages)

	Yes	No
Reasonable time off to conduct equality rep role	64	36
Reasonable time off to undergo relevant equality rep training	80	20
Cover for regular job or a reduced workload to conduct role	40	60

What is perhaps notable, however, is that nearly six in ten of the equality reps (57 per cent) who say that managers give them reasonable time off are spending less than two hours a week on the role. This could suggest that a significant number of equality reps feel that the role can be performed adequately in this amount of time. It could also suggest that while these equality reps are currently not spending a great deal of time on the role, they feel that managers may well be willing to give them greater time off should they choose to dedicate more hours per week to it at some point in the future. However, it remains to be seen whether managers would continue to offer reasonable time off should equality reps currently spending little time on the role begin to spend greater time on equality rep activity.

c) Provision of information

Arguably, equality reps are unlikely to be able to perform the equality rep role effectively unless managers provide them with adequate information concerning equality matters. One-half of equality reps (50 per cent) state that management provide them with adequate information to be able to perform the role effectively. This suggests that the remaining one-half of equality reps feel that access to more information from management would help increase their effectiveness in addressing equality issues.

d) Equality forums or committees

One further form of support management might offer to equality reps is the establishment of an equality committee or forum. Less than one-half of equality reps report their

employer has an equality committee or forum (47 per cent). However, where a committee or forum exists, 60 per cent of equality reps participate on it.

e) Formal agreements

A final factor that might be important in underpinning the work of equality reps is whether there is a formal agreement in place that sets out the arrangements for equality reps. Only 25 per cent of equality reps report that a formal agreement of this nature is in place within their workplace.

Equality rep characteristics

A number of equality rep characteristics might influence their ability to perform the equality rep role effectively. The first is whether the equality rep has prior experience in a union representative role. Reps that have prior experience may well be able to draw on this experience to perform the equality rep role more effectively. Given this, it is notable that most equality reps are drawn from the existing union representative population. Indeed, less than one-fifth of equality reps (18 per cent) are new activists. Arguably, reps that have no prior experience may be less effective in performing the equality rep role as they lack the experience necessary to perform the role effectively. Alternatively, one might argue that new reps may have been attracted to the role because they have a specific interest in equality issues and they will therefore be more likely to dedicate the effort necessary to perform the role effectively.

Second, the period of time the equality rep has spent in the role (irrespective of whether or not they are a new activist) could also prove an important influence on their ability to influence employer equality policies positively, given that as equality reps gain experience they are likely to accumulate the skills and knowledge necessary to perform the role effectively. As such, it is notable that reps have spent an average of 2.1 years in the role, and 13 per cent of reps have been performing the role for 4 or more years. This suggests that a large number of reps now have significant experience within the role. One must keep in mind, however, that a large minority of equality reps (30 per cent) have been in the role for less than a year. These reps may have found it more difficult to have influenced employer equality practice either through a lack of experience or simply because they have not been in the role long enough to have had any significant influence yet.

A further characteristic that might influence the ability of equality reps to perform the role effectively is whether they hold another union post as well as the equality rep post. More than four-fifths (85 per cent) of equality reps currently hold another union post as well as an equality rep post ('hybrid reps'). However, one might expect multi-role 'hybrid' equality reps to be less likely to focus on equality issues than dedicated equality reps given that the other rep activities they are responsible for could well 'crowd out' equality issues. In addition, non-traditional union activists who become 'dedicated' equality reps may be drawn to the role specifically because they have a particular enthusiasm for equality issues and hence may perform the role with greater energy. Against this, however, multi-role 'hybrid' reps might be better placed to influence employer equality practice positively given that they are likely to be better integrated into broader union networks and structures, and may be able to mobilise the influence this provides when playing the equality rep role. In addition, given that the role currently does not have statutory backing, it may well be the case in many organisations it is not possible to play the equality rep role meaningfully unless the rep also plays another union role (shop steward or safety rep, for example) that accords them rights to time off.

The equality rep role could also be a route by which people get involved in broader union

activity. Although few equality reps are new activists (18 per cent), of these, 43 per cent are now performing another role in addition to the equality rep role. This could, however, be an indication of the problems equality reps face in performing the role in the absence of statutory rights, as they have to take another rep position or a shop steward position in addition to the equality rep role in order to receive any form of statutory backing.

Equality rep impact on employer equality practices

A central aim of the survey was to assess the extent to which equality reps have been able to influence employer equality practices. As demonstrated by Table 10, more than three-fifths of equality reps report having impacted on employer disability practices, just over half report having impacted on employer gender, race and age practices, and just under half report having impacted on sexual orientation and religion and belief practices.

Table 10: The impact of equality rep activity on employer equality practice (percentages)

	A lot	Some	A little	None
Positive impact on:				
Gender practices	9	22	22	47
Race practices	9	19	24	49
Disability practices	13	23	24	39
Age practices	7	24	24	45
Sexual orientation practices	9	16	22	52
Religion and belief practices	7	16	23	55

In addition, equality reps state that as a result of their equality rep activity, managers have: made improvements to flexible working and work-life balance practices (40 per cent); taken action to prevent grievances arising over unequal treatment (41 per cent); and made improvements to equality practices in order to enhance organisational performance (39 per cent).

Overall, a clear majority of reps (81 per cent) report they have had an impact on employer practices in at least one of the areas described above. This suggests that equality reps have already had a significant effect within their workplaces even though the role has only developed recently and the average length of time equality reps have spent in the role at present is only just over two years.

What factors influence equality rep effectiveness?

This section of the report seeks to explore whether and how far the activities equality reps engage in, the support they receive and their characteristics outlined above are associated with their ability to influence employer equality practices.

The results of this analysis are reported in table 11. The estimation technique used is maximum likelihood ordered probit. This enables a range of factors to be held constant that might influence the association between the activities equality reps engage in, the support they receive, their characteristics and the impact they have had on employer equality practice.

Table 11: Factors associated with the ability of equality reps to influence employer equality practice

	Influence of equality rep on employer:		
	Gender equality practices	Race equality practices	Disability practices
Union post previously held	-0.876 (0.321)***	-0.560 (0.298)*	-0.093 (0.297)
Other union post currently held	1.080 (0.360)***	0.375 (0.337)	0.165 (0.334)
Time spent as equality rep (reference category: less than one year)			
1 to less than 2 years	-0.361 (0.255)	-0.293 (0.254)	-0.262 (0.245)
2 to less than 3 years	-0.093 (0.306)	0.019 (0.290)	-0.079 (0.284)
3 or more years	0.496 (0.273)*	0.114 (0.265)	-0.298 (0.264)
Employer provides:			
sufficient office space	-0.377 (0.277)	-0.178 (0.268)	-0.222 (0.264)
sufficient communication equipment	-0.427 (0.356)	0.018 (0.331)	-0.054 (0.325)
adequate information to conduct the role	-0.105 (0.256)	0.195 (0.252)	-0.063 (0.246)
reasonable time off to conduct the role	0.038 (0.250)	0.050 (0.251)	0.070 (0.236)
cover for regular job or a reduced workload	-0.235 (0.219)	-0.268 (0.221)	0.177 (0.211)
Five or more hours per week spent on equality rep activities	0.529 (0.245)**	0.440 (0.245)*	0.601 (0.239)**
Contact with any level of management in role as equality rep at least once a month	1.028 (0.238)***	0.837 (0.227)***	1.290 (0.229)***
When deciding equality policies and practices managers normally: (reference category: do not involve union reps at all)			
Inform	0.749 (0.360)**	0.508 (0.337)	0.287 (0.320)
Consult	1.151 (0.353)***	0.629 (0.318)**	-0.026 (0.311)
Negotiate	1.222 (0.347)***	0.892 (0.324)***	0.244 (0.315)
Do you agree or disagree that managers at this workplace value your equality rep activities; (reference category: disagree)			
Neither agree nor disagree	0.395 (0.269)	0.303 (0.257)	0.403 (0.250)
Agree	0.260 (0.282)	0.246 (0.278)	0.442 (0.274)
Arrangements for equality reps set out in formal agreement	0.053 (0.239)	0.129 (0.228)	0.234 (0.231)
Does the employer have an equality committee or forum Which the equality rep regularly attends (reference category: no committee or forum)			
Committee or forum that the equality rep does not regularly attend	-0.034 (0.282)	0.293 (0.267)	-0.013 (0.263)
Committee or forum that the equality rep regularly attends	0.753 (0.256)***	0.453 (0.247)*	0.772 (0.246)***
Sector (reference category: public sector)			
Private sector	-0.338 (0.331)	0.014 (0.319)	-0.009 (0.311)
Not for profit/ voluntary sector	-0.554 (0.672)	-0.381 (0.640)	-0.839 (0.652)
Organisation size: (reference category: 0-99 employees)			
100-249 employees	1.112 (0.874)	-0.748 (0.933)	1.123 (0.855)
250-999 employees	0.413 (0.749)	-0.551 (0.718)	0.702 (0.728)
1000-4999 employees	0.338 (0.702)	-0.584 (0.666)	0.672 (0.679)
5000-9999 employees	-0.008 (0.734)	-0.980 (0.701)	0.465 (0.701)
10000 employees or more	0.517 (0.699)	-0.321 (0.665)	0.923 (0.679)
Pseudo R2	0.245	0.189	0.215
N	205	205	205

Table 11 continued:

Influence of equality rep on employer:

	Age equality practices	Sexual orientation equality practices	Religion or belief equality practices
Union post previously held	-0.557 (0.299)*	-0.588 (0.326)*	-0.376 (0.317)
Other union post currently held	0.435 (0.340)	1.087 (0.398)***	1.098 (0.383)***
Time spent as equality rep (reference category: less than one year)			
1 to less than 2 years	-0.445 (0.249)	-0.150 (0.276)	-0.558 (0.273)**
2 to less than 3 years	0.038 (0.285)	0.281 (0.309)	0.045 (0.305)
3 or more years	-0.314 (0.269)	0.355 (0.284)	-0.252 (0.277)
Employer provides:			
sufficient office space	-0.279 (0.272)	-0.156 (0.281)	-0.546 (0.278)**
sufficient communication equipment	-0.061 (0.332)	-0.489 (0.358)	-0.149 (0.336)
adequate information to conduct the role	0.277 (0.253)	0.180 (0.267)	0.460 (0.272)*
reasonable time off to conduct the role	-0.066 (0.243)	-0.160 (0.258)	-0.228 (0.261)
cover for regular job or a reduced workload	0.242 (0.214)	-0.099 (0.223)	-0.022 (0.228)
Five or more hours per week spent on equality rep activities	0.900 (0.243)***	0.639 (0.254)**	0.536 (0.249)**
Contact with any level of management in role as equality rep at least once a month	0.776 (0.229)***	0.718 (0.247)***	0.820 (0.244)***
When deciding equality policies and practices managers normally: (reference category: do not involve union reps at all)			
Inform	0.738 (0.336)**	0.628 (0.359)*	0.257 (0.350)
Consult	0.578 (0.324)*	0.493 (0.341)	0.290 (0.331)
Negotiate	0.833 (0.324)***	1.043 (0.345)***	0.859 (0.335)***
Do you agree or disagree that managers at this workplace value your equality rep activities; (reference category: disagree)			
Neither agree nor disagree	0.097 (0.254)	0.602 (0.281)**	0.039 (0.268)
Agree	0.165 (0.276)	0.762 (0.297)***	0.092 (0.285)
Arrangements for equality reps set out in formal agreement	-0.007 (0.233)	-0.207 (0.240)	0.252 (0.236)
Does the employer have an equality committee or forum Which the equality rep regularly attends (reference category: no committee or forum)			
Committee or forum that the equality rep does not regularly attend	0.357 (0.269)	0.128 (0.288)	0.174 (0.280)
Committee or forum that the equality rep regularly attends	0.595 (0.248)***	0.556 (0.260)**	0.688 (0.262)***
Sector (reference category: public sector)			
Private sector	0.279 (0.332)	-0.209 (0.333)	0.157 (0.329)
Not for profit/ voluntary sector	-0.063 (0.631)	-0.058 (0.729)	-0.272 (0.742)
Organisation size: (reference category: 0-99 employees)			
100-249 employees	-1.013 (0.859)	-1.349 (0.890)	0.432 (0.904)
250-999 employees	-1.114 (0.687)	-0.643 (0.726)	-0.220 (0.752)
1000-4999 employees	-0.632 (0.631)	-1.526 (0.696)**	-0.183 (0.704)
5000-9999 employees	-1.040 (0.664)	-1.645 (0.724)**	-0.427 (0.735)
10000 employees or more	-0.690 (0.631)	-1.0701(0.686)	-0.033 (0.700)

Pseudo R2	0.200	0.233	0.226
N	205	205	205

Notes:

Coefficients given. Standard errors in brackets.

*** significant at 1 per cent; ** significant at 5 per cent; * significant at 10 per cent.

Equations also control for: workplace size; Standard Industrial Classification major group; whether the equality rep represents managers/ professionals, non-managers or a combination of both groups; the equality rep's gender, age and ethnicity.

Equality rep activities

The analysis reported in table 11 suggests that a number of the activities equality reps engage in are associated with the likelihood that they have impacted on employer equality practice. First, where equality reps dedicate a significant amount of time to the role they are more likely to have had an effect than are equality reps spending less time on the role. Indeed, table 11 demonstrates that equality reps that usually spend five hours or more per week on the role are more likely to have influenced employer gender, disability, age, sexual orientation and religion or belief practices than are equality reps that have spent less time on the role. They are also slightly more likely (at the 10 per cent significance level) to have influenced employer race equality practice. As demonstrated by table 12, the differences between equality reps spending 5 hours or more per week on the role and those spending less time on the role in terms of the extent to which they have influenced employer equality practice are substantial. It would appear therefore that this is a particularly important influence on the ability of equality reps to influence employer equality practice, and this in turn suggests that statutory rights to time off for equality reps would provide equality reps with important support in helping them to perform the role more effectively.

Table 12: Equality rep impact if spending five hours a week or more on the role (percentages).

	Spends five hours or more	Spends less than five hours
Positive impact on:		
Gender practices	76	49
Race practices	67	49
Disability practices	84	57
Age practices	78	51
Sexual orientation practices	69	43
Religion or belief practices	71	39

It is perhaps notable, however, that while the amount of time equality reps spend performing the role is positively associated with their ability to perform the role effectively, there is no evidence to suggest equality reps are more likely to have influenced employer practices in instances where they also state that their employer provides them with reasonable time off to conduct the role or where they receive cover for their regular job or a reduced workload. This is not to say that providing equality reps with reasonable time off to perform the role or cover for their regular job is unimportant, as these are clearly factors that have the potential to increase the number of hours equality reps spend performing the role. As noted above, however, many of the reps who say they receive reasonable time off to perform the role are spending less than two hours a week on

equality rep activities. This suggests a role for unions in encouraging these equality reps to increase the amount of time they spend on the role. One might also argue though that should these reps decide they want to spend more time on the role, managers might become less supportive – managers may well be willing to cover equality reps’ regular role and give them time off while this is only a few hours a week but if the commitment becomes greater it perhaps becomes possible that they will withdraw their support. This would further point to the need for statutory rights to ensure equality reps are given the time they need to perform the role.

A further equality rep activity that appears particularly important in determining the ability of equality reps to influence employer equality practice is the frequency with which they discuss equality matters with managers. Arguably, equality reps will find it difficult to influence employer equality practice if managers are not prepared to engage with them. This is borne out by the results in table 11, which suggest that equality reps that have contact with any level of management in their role as an equality rep at least one a month are more likely to have positively influenced employer equality practices with regard to all six areas of equality than are equality reps whose contact with management is less frequent. As demonstrated by table 13 the difference between the two is substantial. This would appear, therefore to be a further particularly important determinant of equality rep effectiveness.

Table 13: Equality rep impact if they have had contact with management in their equality rep role at least once a month (percentages).

	Contact with management at least once a month	Contact with management less than once a month or never
Positive impact on:		
Gender practices	75	42
Race practices	75	40
Disability practices	88	48
Age practices	79	43
Sexual orientation practices	70	35
Religion and belief practices	71	31

The importance of management engagement with equality reps is further demonstrated by the finding in table 11 that equality reps are more likely to have impacted on employer equality practices in instances where negotiation over equality matters takes place. In workplaces where negotiation occurs, equality reps are more likely to have positively influenced five of the six areas of employer equality practice (gender, race, disability, age and sexual orientation) than are equality reps who are in workplaces where managers normally do not involve unions when deciding equality matters. The difference between equality reps in workplaces where negotiation occurs and those where it does not occur in terms of their impact on employer equality practices is substantial (as described in table 14). It is notable that there is less evidence that equality rep effectiveness is higher in instances where consultation over equality occurs or where managers simply inform unions with regard to decisions concerning equality. This further points to the importance of negotiation over equality as a determinant of equality rep effectiveness.

Table 14: Equality rep impact in instances where management negotiate with, consult or inform union reps when deciding equality policies and practices (percentages).

When deciding equality policies and practices here, managers normally:

	Negotiate with union reps	Consult with union reps	Inform union reps	Do not involve union reps at all
Positive impact on:				
Gender practices	69	62	53	27
Race practices	65	61	50	29
Age practices	69	62	53	36
Sexual orientation practices	63	50	44	31
Religion or belief practices	57	47	41	36

Management support

A number of elements of management support would appear to be associated with the ability of equality reps to play the role effectively. One particularly important element of management support is whether managers have established an equality committee or forum and, importantly, whether the equality rep regularly attends that committee or forum. As demonstrated by table 11, equality reps in workplaces where there is an equality committee or forum, and where they regularly attend that committee or forum, are more likely to have influenced employer equality practice with regard to gender, disability, age, sexual orientation and religion or belief than are equality reps in workplaces where there is no committee or forum. In addition, there is weak evidence (at the 10 per cent significance level) that they are more likely to have influenced employer race practices. The difference between equality reps in workplaces where they regularly attend an equality committee or forum and equality reps in workplaces where there is no committee is substantial, as demonstrated by table 15. It is also notable in table 11 that equality reps in workplaces with a committee or forum that they do not regularly attend are no more likely to have influenced equality outcomes than are equality reps in workplace where there is no committee or forum. Hence, it is not simply the existence of an equality forum or committee that is important, but whether or not the equality rep has a voice on it.

Table 15: Equality rep impact in workplaces with an equality forum or committee (percentages)

	No equality committee or forum	Committee or forum but equality rep does not regularly attend	Committee or forum which equality rep regularly attends
Positive impact on:			
Gender practices	45	51	74
Race practices	42	62	69
Disability practices	54	67	78
Age practices	47	64	69
Sexual orientation practices	40	51	62
Religion practices	34	51	66

Equality rep characteristics

A number of equality rep characteristics are associated with the ability of equality reps to play the role effectively. As reported above, a significant proportion of equality reps are new reps that have not had any experience of a former representative role (18 per cent). As argued earlier, new reps may be less effective as they lack the experience necessary to perform the equality rep role. Alternatively, one might argue that new reps may have been attracted to the role because they have a specific interest in equality issues and will therefore perform the role with greater energy. The results in table 11 suggest greater support for this latter interpretation, although the evidence is weak. Equality reps that previously held a union role before becoming an equality rep are less likely to have positively influenced employer gender equality practices, and are slightly less likely (at the 10 per cent significance level) to have influenced employer equality practices with regard to race, age and sexual orientation than are reps for whom the equality rep role is their first experience of union representation.

As also argued above, the period of time the equality rep has spent in the role (irrespective of whether or not they are a new activist) could also prove an important influence on their ability to perform the role effectively, given that as they gain experience in the role they are likely to accumulate important skills and knowledge. 30 per cent of equality reps have been in the role for less than a year. However, as demonstrated by table 11, these reps are just as likely to report having influenced employer equality practices as are equality reps that have been in role for a longer period of time. This suggests equality reps are able to have an influence within their workplaces very soon after adopting the role.

Whether the equality rep holds another union post might also influence their ability to perform the role effectively. As argued earlier, one might expect multi-role reps also holding another union post ('hybrid' reps) to be better placed to have a positive influence given that they are likely to be better integrated into broader union networks and structures. Alternatively, non-traditional union activists who become 'dedicated' equality reps may be drawn to the role specifically because they have a particular enthusiasm for equality issues. In addition, equality issues are less likely to be 'crowded out' for these reps than for 'hybrid' reps who may only have a limited amount of time they are able to dedicate to equality issues given the other rep activities they are responsible for.

The analysis in table 11 suggests, however, greater support for the former interpretation than the latter. Equality reps that also hold another union representative post are more likely to have influenced employer gender, sexual orientation and religion or belief practices than are equality reps who do not also perform another union role. As demonstrated by table 16, the differences between multi-role and dedicated equality reps are substantial in terms of the extent to which they have positively influenced employer equality practice. This could be a reflection of the fact that equality reps do not currently have statutory rights. Hence, in order to play the role effectively, it becomes necessary that they also take another role (shop steward or safety rep, for example) and use some of the statutory rights to time off afforded by that role to play the equality rep role. This is reflected by the fact that only 7 per cent of 'dedicated' equality reps spend 5 or more hours on the equality rep role in comparison with 24 per cent of 'hybrid' reps. This further points to the need for statutory rights for time off for equality reps. In the absence of such rights, equality reps will only be able to dedicate significant time to the role if they also take another union role and use some of the facility time accorded to that role to play the equality rep role.

Table 16: The impact of ‘hybrid’ and ‘dedicated’ equality reps on employer equality practice (percentages).

	‘Hybrid’ equality reps	‘Dedicated’ equality reps
Positive impact on:		
Gender practices	57	41
Sexual orientation practices	52	28
Religion or belief practices	49	28

Finally, some of the controls included in table 11 are worth reporting in their own right. First, it is perhaps notable that equality reps in the private sector have been just as successful at influencing employer equality practice as have equality reps in the public sector. Given the duty to promote equality within the public sector one might argue that public sector equality reps are better placed to influence employer equality practice than are private sector equality reps. There is no evidence however to support this argument. Second, equality reps are just as successful in small organisations as they are in large organisations, with equality reps in organisations with less than 250 employees and equality reps in organisations with 5000 or more employees being equally likely to have influenced employer equality practice. It would appear, therefore, that equality reps have just as much of a role to play in small and medium-sized enterprises as they do in large organisations.

Case Studies

The remainder of this report presents four case studies of organisations with equality reps and the views managers express about the contribution equality reps have made to business performance.

Walsall Council

Walsall Council has a long standing and “forward-thinking” approach towards equality policies. The Chief Executive chairs the Corporate Equalities Board, equality is a standing item on the Corporate Employment Relations Forum chaired by an Executive Director, and equality boards in each directorate conduct equality impact assessments of policies. In addition, the Council has just gained Equality Standard Level Three accreditation. Developing equality reps at Walsall Council is regarded by managers as an important part of enhancing the capacity of the Council to advance a well established commitment to equality and a positive industrial relations approach to equality issues, with the HR manager for operational services “much preferring to work together, to get an agreement, rather than imposing policies”. The GMB equality rep Sharon Harding confirmed the union has “a brilliant working relationship with the equality and diversity team at the council”.

The Council currently faces a number of strategic challenges. These challenges frequently have equalities implications, and given this work of equality reps is regarded as critical in helping the Council build the capacity to meet these challenges successfully. Every new and revised policy is reviewed through by unions, with equality reps having the opportunity to suggest amendments to those policies. For example, after reviewing the proposed new grievance policy, Sharon Harding, the GMB equality rep recommended including a tick box on the grievance form asking whether bullying was racially motivated. This change

will allow the Council's equality boards to utilise the grievance data to identify the existence and extent of racist staff behaviour. Equality reps have also helped to ensure Council policies meet the needs of staff from different minority groups. For example, noticing that the recent suggested changes to the draft holiday policy only mentioned allowing staff to take time off to celebrate Christmas, Harding highlighted the need also to allow time off to celebrate other religious festivals. Looking forward, future challenges will include ensuring that existing equality policies and practices are compliant with the forthcoming Single Equality Bill. It is anticipated that equality reps will play "a valuable role" in ensuring this compliance. The work of equality reps on the Employment Relations Board is expected to have a particularly significant organisational impact in this regard. Managers fully expect that equality reps will play an important role in challenging management proposals during this process, expecting them to "look for the equalities impact, as managers would ... equality reps should be challenging us on that".

The Council is also starting the process of converting to single status, meaning a lot of work will be required on pay structures and equal pay. The HR manager for operational services argues that it will be "vital to work together on job evaluation with the unions", and equality reps "will need to deal with the technical data on pay structures". Although other union reps may help in meeting these challenges, managers anticipate that equality reps will provide a level of expertise over and above that of general union reps. As the HR manager explained, "equality is their specialism, general reps have to be jacks of all trades, whereas equality reps provide specialist knowledge and on some issues like single status you need union reps with complimentary tasks because it is such a big issue". For example, at an early stage in this process, the equality rep detected that some members were not being informed about the shift to single status and suggested that communications needed to be accessible to all employees. Working closely with HR managers, materials were subsequently produced and distributed separately in different languages and in different formats for employees with disabilities. In addition, briefing sessions have been organised in different locations to ensure employees who are not office-based and may have missed information distributed on the intra-net are kept informed of developments.

Developing the ability of equality reps to help the council meet these challenges is regarded by the HR manager for operational services as "part of the employer's role in investing in staff development ... equality reps are employees of the council and should be developed like any employees. It is in our best interests to develop competent equality reps". Given this, the Council ensures equality reps have the technical expertise required to perform the role effectively, giving them time off to access the training courses and conferences provided by their unions. The Council also regards it as important to "train and develop their softer skills to help them with assertiveness training, influencing skills and time management".

In addition to the employer-focused role played by equality reps at Walsall Council, they also play an important employee-focused role in helping their members with equality issues. The HR manager for operational services feels the equality rep role provides significant benefits over and above other union rep roles, because the equality rep role provides both managers and employees with a specialised and identifiable point of contact they can go to should an equalities issue arise. She commented:

"A nominated equality rep makes a difference because we'd know who to go to. For example, if we have a particular case we needed to talk about where an employee is claiming discrimination, and they are a union member, it is clear we need to discuss it with the equality rep for that member. We'd approach the equality rep with "you

need to know we've had a complaint from one of your members" and know the equality rep would be able to help deal with this because they have the background knowledge and it is her specialism. So just on the practical case work level the equality rep would be more likely to effectively represent staff who are claiming discrimination as opposed to going to a rep who is used to dealing with other grievances".

The specialist knowledge that equality reps possess also gives them the potential to play a central role in resolving equality-related grievances as and when they arise, thereby ensuring the individual worker feels comfortable to return to work as soon as possible. As the HR director for operational services explained, by engaging with both employees and managers in a proactive and positive manner, equality reps "are able to justify to managers what reasonable adjustments may be required" to resolve a grievance, and also to work with their members "to become constructively involved in getting back to work". The HR manager added that the ability of equality reps to resolve grievances quickly and in an informal manner without recourse to formal procedures, "where positions become difficult resolve", has a "big organisational impact by preventing potential tribunal cases that are costly in both financial and reputation terms". Much of equality reps' casework concerns negotiating flexible working and representing members over racial bullying and harassment incidents. In relation to the former, although Walsall Council has very good policies in place covering flexible working and reduced working time, equality reps play an important role in helping line managers understand how to operationalise these policies to meet the needs of individual employees, thereby allowing employees to match their child care responsibilities to hours of work, and preventing formal grievances from being taken out.

In addition, equality reps have also intervened in racial bullying cases, explaining the damaging effects of racist language and encouraging managers and their staff to undertake the diversity training offered by the Council. As a result, diversity training has taken place in several departments where it would not have otherwise happened in the absence of intervention from equality reps. Senior executives recognise the value of this work in helping to retain staff who might otherwise have left their employment with the Council due to racial bullying. Reflecting this, the Chief Executive has asked unions to highlight areas of concern in order that training can be targeted on the departments where it is most needed. Senior Council leaders see this as critical because equalities policies, procedures and training do not always filter all the way down the organisation. Managers also recognise that "the personal drive, commitment and passion" of equality reps is invaluable in keeping equalities issues high up the employers' agenda, and keeping senior executives informed of equalities issues as they develop "on the ground". In this sense, equality reps are seen as providing an "early warning system", highlighting emergent problems concerning staff treatment in different departments, thereby helping managers understand why sickness and absence levels might be increasing, for example. Managers therefore view equality reps as important "weather vanes", ensuring senior management becomes aware of problems as they arise, thereby enabling them to address these problems before they escalate.

The GMB equality rep, Sharon Harding, has also helped to ensure the Council has met its' TUPE obligations by focusing on equality issues around staff transfers. For example, when a highways contract was outsourced to Tarmac in 2008, she helped check the new organisation's equality practices as part of due diligence checks in transferring terms and conditions of staff. One problem she identified was a female employee with young children who had agreed with her line manager at the Council that she would work reduced hours

(four days a week). Tarmac did not have a reduced hours policy and instead proposed she was taken across to the new organisation on a part-time contract. Harding, however, ensured that this did not occur, thereby guaranteeing that the employee can increase her hours if she chooses to in the future when her children become older. This example is perhaps notable as it demonstrates that the work of equality reps does not just benefit their own organisations, but has the potential to “spill over” into other organisations (in this case an organisation to which staff were being transferred). Other examples of spill-over effects include Harding being invited to discuss the implications of the Single Equalities Bill at another Council as part of her membership of union equality committees and BME networks. More broadly this work is consistent with Walsall Council’s aim to, “try to do exemplary work before statutorily required”, and to “set equalities standards as the largest employer in the borough for others to follow”.

Both Harding and the HR manager for operational services highlighted a number of barriers, however, that were hindering the performance and development of the equality rep role. Role overload was identified as the main barrier, with Harding not having sufficient time to realise her full potential given the amount of casework her role involves. Even among employers taking the role seriously and supporting staff to train as equality reps, the role may require broader funding and support beyond that offered to date by the Union Modernisation Fund. This support is important to recruit and train equality reps in sufficient numbers.

Harding also argued that the equality rep role would remain limited in the absence of statutory backing. She explained that although her main interest is in representing members rather than negotiating terms and conditions, she had also had to take on a shop steward role despite not wishing to do so, as this was necessary to gain the recognition and respect necessary to represent members on equalities issues. She commented:

“It has been virtually impossible to act in the equality rep role without becoming a shop steward. It was constantly, ‘you can’t say anything, we’ll have to go to a shop steward’, even though I’d know the issues better than they would, I’d have to have my voice through them. Despite being the branch equality officer for five years, and given as much as I knew about equality issues, I couldn’t represent members. So I became a shop steward so I could represent people and get the recognition”.

Taking on the shop steward role was also necessary in that it provided her with facility time that she could use to “to do a lot of the work I’d like to do as an equalities rep”, this came at the cost of role overload, given the additional rep duties she was now responsible for. In explaining what would work better for her, Harding commented:

“...to be recognised just as an equalities rep. Because I have to be a shop steward my attendance is expected at JCCs, but that’s not what I want to do. We’ve shop stewards who are trained negotiators on terms and conditions generally. I know the Council’s equality policies and that’s what I want to do, that’s where my expertise and interests lays. It would be easiest for me if my facilities time is just focussed on equalities dealing with equalities issues, then I wouldn’t have to do the other stuff that takes me away from that. At the moment I wouldn’t get the facilities time just on equalities issues, and as a result I was seeing members on equalities issues until seven o’clock last night”.

Principality Building Society

Principality Building Society employs 750 staff, 250 of whom work in the Cardiff head office, with the remainder working in the Society's 51 branches. In the last few years, Principality has placed a greater emphasis on equality issues and the HR department has worked closely with Unite to advance this agenda. In particular, this has involved setting up an equality forum. Several members of this forum had, in previous jobs in large banks, participated in equality forums that had failed. In one case the equality forum "did not last six months" and in another case "it didn't do anything". Although the Equality Forum at Principality is only 18 months old, the HR Director already regards it as "one of the successes". In part, this success is helped by the desire to keep equalities issues at the top of the Society's agenda, the Executive Committee of the Society being "aware of the initiative and fully supporting it". The HR Director explained that increasing the diversity of staff recruited and "attracting the brightest people with the skills to help our business" is essential for the Society if it is to succeed in the competitive financial services sector:

"As a Society we want to be the best, maintain our success in the financial services sector, and the only way of doing that is to have great staff. We need to be fully inclusive and not excluding groups, and we need to ensure our recruitment practices ensure we attract the talented staff we need who are selected on ability."

The development of equality reps has enabled the Equality Forum to flourish. The HR Director explained the role of equality reps as helping Principality to focus on equalities issues:

"We already had a workplace agreement with Unite which spurred the discussion around setting up an equalities forum. As an organisation we were not particularly advanced on equalities issues, but momentum was gathering. We were aware we didn't have anything to focus on and point us in the right direction. When we discussed equality reps with Unite, we thought it was an excellent idea to have someone focussed on the equalities area which often doesn't get the focus that's needed. Anne was appointed as the equality rep, did her training, and is a key leading figure of the equalities forum."

There is a particular appreciation of the knowledge of best equality practices in other firms that the equality rep possesses as a result of her training and her contact with reps elsewhere. As the HR Director explained:

"Anne has brought back external ideas on best practice that she has learned about from her union colleagues and feeds these into the Forum. We have also worked with union officers from the local area and Natasha Hirst from the Wales TUC Equality Rep Project. We are hungry for ideas. The equalities agenda is massive and rather than get confused about where to start, we have been able to decide on our priorities. What Anne as the equality rep has been able to do, by bringing in external views and ideas, is to say 'actually this is the area we should be looking at'. As a business we could be looking at the wrong things and wasting valuable time. So having Anne in the equalities rep role has been of great benefit to the Society and she has been very influential in this setting. We benefit from the focus on equality she brings and we wouldn't be as advanced on equality issues as we are now without an equality rep."

The Unite equality rep, Anne Cockram, felt she had, "learned a lot from the equality rep training course, learning from reps in other sectors, especially about the Disability

Discrimination Act”, and is currently working with the HR department in Principality to reproduce a course she attended on the use of acceptable and unacceptable language.

The Equality Forum has conducted a staff survey on equalities issues and has focussed on equality training. A half-day equalities training course was developed with managers prioritising which of their staff are required to attend in the next 3, 12 or 24 months. All heads of department and senior managers are also attending equalities workshops. According to the HR Director, “it is absolutely essential managers in the business have a good solid understanding of equalities issues in order for the business to function effectively”. As a result, equalities training is now part of the broader learning and development agenda, with the equality rep working with learning and development managers to decide on appropriate equality training for different areas of the business.

The HR Director was also keen to emphasise the business benefits of developing equality reps:

“The equality rep role is a huge asset in terms of making sure that equality stays on our agenda as a Society, and that’s paramount. As we all strive forward in a very competitive environment, equality issues will be seen more and more as affecting the bottom line through our ability to get the most capable people into the organisation. We need to ensure the people we have in our branch network and head office are the best, and that means not excluding anyone. The financial services sector is not seen as totally inclusive, and we would like to think we are breaking down those barriers, and making sure we have the best staff, attract and retain the best people, to ensure we provide the best services to our members, and working with equality reps on this is a great benefit.”

He also commented on the beneficial impact of the work the equality rep has already undertaken in the organisation:

“Anne produces an enormous output from the time she spends on her union equality rep role. Because we are quite a small organisation we can see the direct impact her work has. Her impact is visible and quickly absorbed into the Society. Her work has a high level of penetration.”

In addition, he argued that the business benefits stemming from the activities of the equality forum and the equality rep do not come at any significant financial cost to the Society: “The work of the Equality Forum is not subject to budgetary constraints because progress towards equality doesn’t involve a huge spend.”

The Equality Forum meeting we observed also focussed on how equality issues could improve business performance. This involved a discussion of whether the current product range appeals sufficiently to minority groups, the representation of minority groups within advertising campaigns, and the desirability of having a workforce that is representative of the local community in order to broaden the Society’s appeal to a wider market base. As the equality rep commented: “we talk about how the Society markets itself because it is a visible sign of whether it is an equal opportunities employer”. For example, the Forum discussed whether a more diverse workforce could be used to advertise accounts that would appeal to overseas students in Wales. It also explored the lack of products and appeal of the Society to 12-18 year olds. A common suggestion was to make sure product adverts are appropriate for the target audience, portray the Society as an equal opportunities employer, and present a business that welcomes a diverse range of

customers. Anne explained:

“we are in control of our own publicity and advertising, so we can have a large impact on how we are perceived outside. We use our staff as models in adverts and if our employees are not the most diverse then our adverts won’t be. We are trying to encourage staff from ethnic minority groups to come forward as models to present a more diverse image, in order to recruit a more diverse workforce, and appeal to a more diverse customer base”.

The forum meeting developed several product ideas to take to the marketing department and to invite a representative from the marketing department to the forum to discuss these ideas and consider the impact of marketing campaigns.

Betsi Cadwaladr

At the Betsi Cadwaladr University Health Board in Wales, the Unison equality representative, Jan Tomlinson, has worked closely with her local HR manager, Sian Jones, to deliver training and development sessions on “Dignity and Respect” issues. Prior to these sessions, HR had conducted 20 disciplinary investigations in the previous 18 months, six of these investigating bullying and harassment complaints typically “pushing, shoving and swearing”. Although the Health Board had implemented dignity and respect policies, the three HR managers covering 2,000 staff each lacked sufficient time to train staff and explain the policies to line managers who, according to Jones: “didn’t open the policy files”. Given this, she explained “we felt we needed to be more proactive; a lot of the defence in these cases was ‘we didn’t know that it wasn’t acceptable’, so we decided to work in partnership with Unison to address this”. Both Jones and Tomlinson hoped to improve staff behaviours, thereby reducing complaints and reducing the need to undertake lengthy and costly investigations. Tomlinson’s passion and commitment has been vital in developing and delivering the Dignity and Respect sessions to address these issues.

The Dignity and Respect sessions were initially delivered in the Facilities areas, with the Directors of Estates and Facilities making attendance mandatory, and themselves attending alongside staff of all grades including managers and supervisors. Similar sessions have subsequently been delivered in admin and clerical and midwifery, and they are now in a situation where “everyone [is] now asking for them”. In just one year, 1,000 staff in groups of 5-15 have attended sessions lasting 15 minutes. These “short sharp shock” sessions have been organised around the different equality strands and use illustrations to highlight specific issues arising in the workplace – swearing, nicknames and inappropriate touching, for example. Jones and Tomlinson both stressed the “shop-floor and bottom up” nature of the initiative, which is tailored to the audience and is based on realistic local examples. In order to maximise staff engagement, the sessions have remained informal. This has been helped by “dressing casually, giving them [staff participants] opportunities to ask questions, making them interactive, and using our own personal examples”. The initiative has been well received by staff, Tomlinson commenting “they usually want to stay behind to discuss their stories”. Each member of staff attending receives a certificate to add to their Knowledge and Skills Framework portfolios.

Both Jones and Tomlinson agree that these sessions had raised staff awareness of equality issues, and changed staff attitudes and behaviours towards each other. The initial outcome was an increase in grievances as staff reflected on the treatment they had previously accepted from colleagues and supervisors, but now regarded as unacceptable behaviour. Bullying and harassment complaints did, however, decrease subsequently, as Jones explained:

“it has made staff aware of acceptable behaviours and it has empowered lower grade staff to speak out. Staff are now behaving differently, they feel happier, staff who previously always wanted to be accompanied by a union rep when they raise issues with me are now happy to come along alone, our relationship has changed”.

Greater clarity has also emerged within the disciplinary process as records are kept of who has attended Dignity and Respect sessions. This information can then be used in formal investigations to identify whether the alleged perpetrator has undergone training, and hence should be aware of acceptable and unacceptable behaviours.

The Dignity at Work initiative is seen as having brought about several notable business benefits. As Jones explained, “reducing bullying has reduced stress-related absenteeism and reduced sickness levels”. It has also resulted in service delivery benefits for patients as the sessions also discuss dignity and respect issues within staff-patient interactions. This, according to Jones:

“...helps staff to understand how their behaviour with patients reflects on the Area Health Board’s reputation... if staff know how to speak to each other and how to behave they will be happier in the workplace, and that will also have a knock-on effect in the care that is given to patients. Staff will also be able to say to patients ‘that’s not appropriate’”.

The Dignity and Respect sessions have also helped build a team ethos. When facilities staff in one session raised concerns about the attitudes and behaviours of clinicians, HR wrote to all ward managers asking them to remind nursing staff of the behaviour expected towards facilities staff by their accreditation bodies and their employer. In conducting sessions with nursing and midwifery teams, a discussion is always held on the role of domestic staff and porters on wards, and their names are now included on shift boards as part of the ward team.

A further business benefit of the work Tomlinson has carried out in her equality rep role is the reputational effects it has brought to the Health Board. Indeed, Jones states that she is “very proud” of the positive attention Tomlinson’s work has attracted, with Tomlinson having won a TUC award for her equality work.

The work of the equality rep also appears to be having a broader impact in spreading good equalities practices, with the Dignity and Respect initiative having been adopted across the Health Board as a sustained initiative. Additionally, other Unison reps have requested the materials, and unions in Rhondda and Taff Council have plans to introduce similar sessions. The union also seems to have benefited from this work on equality with Tomlinson pointing to “a lot more interest expressed by members wanting to become reps”. Indeed, six new reps were recruited at the workplace in the week prior to this study taking place.

As well as playing a key role in developing and implementing the Dignity and Respect sessions, the equality rep has also conducted a lot of work around domestic abuse, working with HR to develop a domestic abuse workplace policy and holding White Ribbon events, taking these events to the Welsh Assembly to encourage Assembly Members to wear White Ribbons. In addition, Tomlinson and Jones have worked closely together on a year long investigation into the laundry area, which had suffered some particularly severe problems with regard to equality. The outcome has been a Laundry Contract specifying the behaviours required from managers and staff and an agreement to treat all staff with dignity and respect.

In all of this work Tomlinson has been supported by HR and has benefited from a supportive line manager who has given her time-off to engage in equality rep activities. Despite this support, Tomlinson nevertheless felt that she needed additional time to perform the role, and this was a key barrier preventing her from developing the role further. Securing additional time to perform the role would, however, be far from straightforward in the absence of statutory rights. Much of the time Tomlinson has spent on equality rep activities has been drawn from the facilities time provided for her role as chair of the local Unison branch. As Jones commented:

“Jan is fortunate as her line manager releases her to do the work over and above that which is included in her facilities time. If she worked for a different manager she wouldn’t have been able to do as much work on equality issues as she does. To have a statutory right to time out would be a positive legal expectation in all organisations”.

Providing statutory support for the equality rep role would also, Tomlinson believes, enable the recruitment of more equality reps. Currently, potential new equality rep recruits are deterred from taking the role given the difficulties that would be involved in securing sufficient time to play the role and in getting managers to take the role seriously. Statutory rights to time off would go a long way to solving this problem. Jones too sees the importance of statutory backing for the role in increasing the willingness of employees to become equality reps, arguing that larger numbers of equality reps would help reduce the workload for HR managers, especially in terms of translating equality policies into messages everyone can trust and understand in the organisation.

Ineos

Ineos acquired the Grangemouth oil refinery from BP in 2005. Against the backdrop of BP’s long-standing commitment to equality, unions and managers at Grangemouth from 2007 onwards developed further joint initiatives to develop equality training and equality reps. As with the other cases described in this report, unions were involved in discussing policy from an equalities perspective, and handling the usual informal and formal casework inquiries to support members. However, it is the role the union has played in helping change the equalities climate at the site that stands out particularly prominently.

The process of change started with unions inviting HR managers to speak at a day-and-a-half long training session on equality issues attended by 13 shop stewards from the site. The HR Director felt this was “absolutely something we should be doing jointly”. This initiative developed into a course jointly designed by the union and HR to address equalities issues. The course usually starts by concentrating on language and includes a choice of informal exercises “to let people decide where they want it to go”. Union involvement ensures the approach on the course involves learners and encourages them to make a contribution, and has also been vital to generate employee trust in the programme and give the initiative credibility. According to both managers and the unions, a joint approach has encouraged buy-in, with one equality rep commenting:

“HR are generous enough to say it does add to equalities training if the unions are involved in it, because it gives it a different type of credibility if we are seen to be doing it in conjunction. The members will say, ‘are the unions involved in this, or is this the company doing something to us?’, and it gives them comfort if you say ‘no, the unions are heavily involved in this, and not only that, but we helped design the course’. Strangely enough managers say the same thing the other way around, ‘is this the unions? Are they trying to do something to us here?’, and we can say ‘no,

no, it's the company'. So the value of a joint initiative is that it's quite powerful.”

The HR Director also emphasised the value of the union's involvement in generating employee trust in equalities training, commenting:

“to communicate change effectively, the folk out on the shop-floor don't trust people like me, I'm corporate Ineos. Day-to-day who are the people they trust? They are going to trust the union who is looking after their interests, and they are also going to trust their supervisor, who is working with them day by day. It is down to me to create a culture that supports an equalities agenda. Out on the shop-floor, it is the union and the supervisors who have the key roles.”

As a result of the equalities training that has been carried out across the company, both the HR Director and the equality reps reported that attitudes and behaviours had changed remarkably. As one equality rep explained:

“In the 1980s there was a horrifying culture and this has noticeably changed. It used to be racist jokes and language, sectarian football banter which could become very serious, language about Irish Catholics, pornography on the walls. Through the discussions and the training courses, for example, a few women said 'they'd never raised it', but they found the pictures 'offensive'. The guys apologised and they now get it. The control rooms and the whole place now looks different. There is none of that now because of the training. I've seen pictures go up and come down the next day because one of our members has explained it is not appropriate ... there has also been a definite improvement in behaviour, and people 'having a go' at each other has definitely changed. In some areas, every day there was a crisis, now they are aware of the issues and that it shouldn't be like that, recognition of the issues. ... In areas with female operators and trainees, guys on the shift have modified their behaviour and that's a big change from 10 years ago. It's a result of greater awareness of inappropriate behaviour, and I've seen one of their colleagues take them aside and say 'that's inappropriate, watch what you're saying, respect people'.”

This cultural change in terms of what is and is not appropriate behaviour has had significant business benefits. In terms of retention, for example, the company has for several years operated initiatives to increase the recruitment of women, such as 'Female Apprenticeships' and 'Engineers of the Future'. Typically, however, the women on these programmes tended to leave after completing their training. Following the equalities training that has taken place across the company, however, these women are now staying with the company because, according to one of the equality reps “they are more comfortable with the environment”. According to the HR Director:

“we can absolutely put this down to the work on equality with the unions. It would be recognised in the plant, there has been work done on the issue of inclusion, we are very open to having the best person for the job. The whole equality area has been a huge opportunity for us, we've broadened people's minds, and it's now absolutely part of the fabric of the place. Having equality reps is part of that and the whole approach to equality we have taken over the last 10 years”.

In addition, the HR Director saw the work equality reps had been engaged in as clearly having had beneficial impacts in terms of employee morale and motivation, with the equalities training that had been undertaken contributing towards a significantly improved

working environment. Commenting on this, he stated: “we are in this equalities conversation because we have to be because of the legislation, but also because we want to be and what it can do for the business”. Pointing to the potential for the tangible contribution of the work of equality reps to the bottom line, he added “look at the improvement in reliability, look at the improvement in the money we are making, look at the improvement in the safety record, and a big part of that is actually the way we treat people, and we have an agenda on inclusion and equality”.

The HRD contrasted what he termed the ‘negative’ and ‘positive’ side of equality rep work at the site by drawing parallels with the work of Health and Safety reps. The ‘negative’ side of the work for equalities reps involves intervening to stop bad behaviours and insist the companies’ equalities practices are followed, in the same way Safety reps investigate incidents when things have gone wrong. Most of this work remains informal and prevents grievances from developing into costly tribunal cases for the company. The ‘positive’ side is the “promotional aspect” whereby equality reps front equalities training and awareness alongside managers, in the same way that Health and Safety reps and managers ensure employees are trained to operate safely. Similarly, the equality reps also drew parallels with health and safety reps, explaining, “it’s not a conflict thing, it’s to make sure everyone is compliant, and to do this in a reasonable fashion which helps the company, so managers can contact equality reps, just as they do health and safety reps, and ask “where do we stand here?””

The HR Director also suggested that the equality rep initiative has had positive spill-over effects in terms of improving industrial relations more generally. The sector as a whole underwent a series of disputes recently over contractors employing foreign labour, and the Grangemouth refinery itself has seen a dispute over pensions. By providing what the HR director described as “a positive issue”, the focus on equalities in recent times has played a key role in re-building relations between management and the union by providing them with “safe ground to stand on with a common agenda”.

With 12 equality reps covering 1400 workers across a 1600 acre site, and notwithstanding the valuable contribution of the union and equality reps described above, the HRD at Grangemouth strongly supported the provision of statutory rights for equality reps to support their work, commenting:

“Why wouldn’t you provide equality reps with statutory powers to help drive the equalities agenda? I can’t think of a reason why you wouldn’t. It is not going to cost us much more, a few days release time for training or to help with an issue, we’re used to doing this for safety reps, we have two full-time convenors, we operate in a way that trade unions are absolutely an integral part of how we do business. So if the next step is to have equality reps with statutory rights to drive forward the business, by improving morale, by improving productivity, making more money for the business, make us more secure, drive long term employment, why wouldn’t you do that?”

He also saw statutory rights for equality reps as something that would be essential in developing a culture across the company that views equality as good for business:

“equality and diversity is about everybody and this whole agenda is about inclusion as opposed to exclusion. Exclusion makes people very unhappy and very unproductive ... statutory backing for equality reps would help convince senior managers it’s what the business should do, it helps to sell the message that equality

is important for the business, in the same way that safety is important for the business”.

Statutory backing would also help HRDs ensure line managers supported the training and contribution of equality reps, explaining:

“Statutory rights would give more legitimacy to having union reps involved in the conversation where you may have some resistance among managers. For example, if we are conducting equalities awareness training for supervisors, I'd be able to say we need your equality rep released and at that training because that is a part of their statutory duties as an equalities rep, and so overcome any resistance if it is there”.

Concluding remarks

This report presented the preliminary findings from the 2009 TUC Survey of Union Equality Reps and from four case studies exploring the impact of equality reps within organisations. The report revealed a number of key findings. First, it is clear from the data generated and the high number of responses to the survey that equality reps are in existence in British workplaces in large numbers. It would also appear that equality reps tend to be located within large workplaces and organisations, suggesting that their ‘reach’ extends across a significant proportion of employees in both the public and private sectors of the British economy. Second, it is clear from both the survey and the case studies that equality reps are performing the role with considerable vigour, the vast majority of equality reps stating in the survey that they had made attempts in the last 12 months to influence employer equality policy and/or to engage in member-focused activity. Only 6 per cent of equality reps had not made any attempt to engage in either employer or member-focused activity and only 12 per cent stated that they usually spent no time on the role, a figure that compares very favourably with estimates of the proportions of ULRs that are inactive, which range from 30 to 50 per cent (see, for example: Bacon and Hoque, 2009; Hollinrake et al., 2008; Wallis et al., 2005).

Third, there is significant evidence within both the survey and the case studies of employer support for the equality rep initiative. Only a third of equality reps in the survey stated that managers do not value their equality rep role. Beyond this, there is evidence that managers are willing to provide equality reps with time off to perform the role, to provide a reduced workload or cover for their regular job and also to pay equality reps for the time they spend on the role. Management support for the equality rep role is also reflected in the widespread discussions between managers and equality reps about equality matters, management willingness to formally negotiate and consult with unions when making equality decisions, and management willingness to provide equality reps with office space and communication equipment.

Fourth, there is considerable evidence that equality reps have had a positive impact in the workplaces in which they are located. In the survey, over four in five equality reps reported having impacted on at least one aspect of employer equality practice. Not only would it seem, therefore, that managers are willing to engage with equality reps and provide support to them, but they would also appear to be amenable to amending and adapting equality policy and practice in response to equality rep suggestions and recommendations. This is perhaps unsurprising given the views expressed by managers in the case study organisations in relation to the business benefits that equality rep activity has resulted in with regard to improved workforce morale, improved recruitment and retention, higher productivity and reduced tribunal costs. It is also notable that equality reps are just as

likely to report that they have had a positive impact in the private sector as they are in the public sector, suggesting just as great an appreciation on the part of private sector managers of the benefits equality reps can bring. Equality reps in SMEs are also just as likely to report having had an impact in their workplaces as are equality reps in large organisations, suggesting that the equality rep initiative has the potential to bring benefits to all sectors of the British economy.

Fifth, there is considerable evidence that, while large numbers of equality reps are already having a positive impact within their workplaces, a number of key elements of support, if offered to equality reps, could significantly improve their effectiveness. A key determinant of equality rep effectiveness is the amount of time they spend performing the role. This is demonstrated clearly in both the survey and the case studies. It is clear that providing equality reps with statutory rights to time off would enable them to increase the amount of time they spend on the role further. Currently, in order to be able to spend a significant amount of time on the role, many equality reps would appear to have to take another union post such as shop steward or safety rep, and use a proportion of the facility time provided by this role to carry out the equality rep role. This is clearly demonstrated in the survey by the fact that only 7 per cent of 'dedicated' equality reps spend more than 5 hours a week on the role in comparison with 24 per cent of equality reps performing another representative role as well as the equality rep role. This puts significant pressure on the time equality reps have to play the role as they find themselves not only having to carry out their equality rep duties but also having to carry out a range of other rep duties. It is also likely that the current necessity to take on additional rep roles to secure the facility time needed to perform equality rep duties is stifling new recruitment to the equality rep role, with many potential equality reps being deterred from taking the role given that it is likely to result in them having to take on other additional union activities as well as the equality rep role. It is highly likely, therefore, that if equality reps were accorded statutory time off in their own right, this would facilitate the recruitment of equality reps in greater numbers, as potential new recruits with a specific interest in equality issues would be able to adopt the equality rep role without having to also take on any other additional rep duties.

A further major influence on the effectiveness of equality reps would appear to be the extent to which they have been successful in encouraging managers to engage with them. As demonstrated within the survey, in workplaces where there are regular discussions between equality reps and managers on equality issues, where there is an equality forum or committee in operation in which the equality rep is involved, and where negotiation over equality takes place, equality reps are significantly more likely to have impacted on employer equality practice than in instances where these discussions or negotiations do not take place or where a forum does not exist. While it is notable that a significant proportion of employers are already engaging with equality reps via these channels, if this proportion can be increased, this is likely to provide a significant boost to the ability of equality reps to play the role more effectively. This would suggest a need for the government to promote the equality rep initiative more vigorously to employers, highlighting the many business benefits that working with an equality rep can bring within the workplace.

Notes

1. Where the respondent stated they are not an equality rep these responses are omitted from the sample. Duplicate responses and responses from reps who are full-time union officials are also omitted from the sample.

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Appendix 2

**Unions and workplace equality: evidence from the 2004 Workplace Employment Relations
Survey**

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Unions and workplace equality: evidence from the 2004 Workplace Employment Relations

Survey

Introduction

It is widely recognised that, alongside employment legislation and voluntary action by employers, trade unions also have a central role to play in advancing the equalities agenda and promoting equality at work. Trade unions may help to ensure that employers adopt equal opportunities (EO) policies and practices to ensure fair and consistent treatment of employees, not least by actively bargaining over equality issues (Dickens, 2007; Heery, 2006). The aim of this report is to contribute to debates on the current role of British trade unions in promoting EO policies and practices, and the legislative support that unions may require in this regard. Such debates are timely given the opportunity provided by the new Single Equalities Bill in 2009 to introduce measures to build the capacity of unions to advance the equalities agenda.

To inform these debates this report provides an empirical assessment of the relationship between three aspects of unionisation (trade union recognition; the presence of on-site union representation; and bargaining or consultation with unions over equality) and the adoption of equal opportunities (EO) policies and practices in British workplaces, using data from the 2004 Workplace Employment Relations Survey (Department of Trade and Industry, 2005). The timing of WERS 2004 does not allow for an exploration of the relationship between union equality representatives and EO policies and practices. It does nonetheless establish a benchmark of union effects prior to the recruitment, training and initial activities of equality reps in the past few years. This benchmark establishes the likely impact of unions on equality in the absence of a significant expansion of equality reps, and thus helps to assess whether further support for the equality rep initiative, such as providing statutory rights for equality reps, may enhance the contribution that unions are able to make towards promoting equality. For example, if unionisation *per se* is strongly associated with EO policies and practices then this could suggest it may be unnecessary to provide further support for specialist union equality reps to consult and negotiate with employers over EO policies and practices. If however unions have only a positive effect on EO policy and practice when bargaining with employers on EO practices, or the union effect is significantly enhanced by bargaining activity, we may reasonably expect further support for equality reps to result in greater union involvement in bargaining over EO, and thereby enhance the positive effect that unions may have on EO policies and practices over and above the contribution unions are able to make to advancing EO without equality reps.

In order to assess these issues, the relationship between unionisation and a wide range of EO policies and practices will be explored. While this includes consideration of whether employers make an overall policy commitment to EO, it is however important to go beyond a general EO policy commitment which may simply be an 'empty shell' in many organisations and not supported by the range of EO practices we would expect to find (Hoque and Noon, 2004). Given this, it is also necessary to explore the relationship between unionisation and a range of specific EO practices relating to recruitment and selection, promotion, pay, workplace accessibility, and family-friendly/flexible working practices. A positive but mixed conclusion was drawn from a previous analysis of the relationship between trade unions and family-friendly practices based on data collected in the 1990s (Budd and Mumford, 2004), and this paper both updates this work by using more recent data, and extends this work by considering a broader range of EO practices.

The specific EO policies and practices the report focuses on are as follows.

- i) The presence of a formal, written EO policy that makes explicit reference to gender, race, disability and age.
- ii) Three practices relating to recruitment and selection, these being, first: whether recruitment and selection decisions are monitored by gender, race, disability and age; second, whether reviews of the recruitment and selection process take place to identify indirect discrimination; and third, whether there are special procedures in place to encourage applications from disadvantaged groups.
- iii) Two practices relating to promotions, these being, first: whether promotions are monitored by gender, race, disability and age; and second, whether promotion procedures are reviewed to identify indirect discrimination.
- iv) Whether pay rates are reviewed by gender, race, disability and age.
- v) Whether formal assessments have been made on the extent to which the workplace is accessible to employees or job applicants with disabilities, and whether adjustments have been made to accommodate disabled employees.
- vi) Whether a range of family-friendly/ flexible working practices are in place (working at or from home in normal working hours, job sharing, flexitime, term-time only contracts, workplace nurseries, financial help with childcare, leave for carers of older adults and maternity leave at the full rate of pay).

The findings provide the most up-to-date overview of the impact of unions on EO practices in British workplaces.

Data and methods of analysis

The data used in this report are drawn primarily from the management survey of the Workplace Employment Relations Survey (WERS 2004). WERS provides nationally representative data on employment relations in British workplaces and the survey is jointly sponsored by the then Department of Trade and Industry, the Economic and Social Research Council, the Advisory, Conciliation and Arbitration Service, and the Policy Studies Institute. Both the Chartered Institute of Personnel and Development and the Trades Union Congress support and endorse the survey. The WERS main management survey comprises 2,295 observations with a response rate of 64 per cent (Kersley *et al.* 2005) and is designed to be nationally representative of workplaces with five or more employees within Standard Industrial Classification major groups D to O (agriculture, hunting, forestry and fishing and mining and quarrying are excluded), when probability weighted to take into account the complex nature of the WERS survey design. The respondent to the survey is the manager at the workplace who has primary responsibility for employment relations matters.

The management survey contains a range of questions relating to the EO policies and practices in operation at the workplace. The Appendix table contains a summary of the EO measures used in this analysis. The survey also asks respondents whether there is a recognised union at the workplace (22.6 per cent of workplaces), thereby enabling an analysis of whether EO policies and practices are more widely adopted in workplaces with union recognition than in non-union workplaces. In addition, the survey asks whether managers when deciding EO issues normally negotiate or consult with trade unions. This enables the creation of a 5 part classification as follows:

- i) Managers negotiate with unions when deciding EO issues (3.7 per cent of workplaces)

- ii) Managers consult unions when deciding EO issues (9.9 per cent of workplaces)
- iii) Managers provide unions with information on EO (4.1 per cent of workplaces)
- iv) Managers do not involve trade unions when making EO decisions (4.9 per cent).
- v) Non union workplaces (77.4 per cent).

This classification will enable an analysis of whether EO policies and practices are more prevalent in workplaces where management negotiates with unions when deciding EO issues or workplaces where managers consult with unions over EO, than in non-union workplaces or unionised workplaces where negotiation and consultation over EO does not take place. This will provide an indication of the extent to which it is important that managers negotiate with unions when deciding EO issues, or managers consult with unions on these issues if unions are to have a positive influence on the EO practices the employer adopts.

The analysis also seeks to identify whether workplaces are more likely to operate EO policies and practices in workplaces where there is an on-site union rep that is involved in EO. Here, data from the WERS 2004 worker rep survey are linked with data from the management survey. The respondent to the worker representative survey, which comprises 984 observations (with a response rate of 77 per cent), is the most senior rep in the workplace. It is possible within this survey to identify whether the rep has spent time on EO in their job as a union representative in the 12 months prior to the survey being undertaken. This allows us to construct the following categorisation:

- i) Union recognition/ on-site rep involved in EO (0.28 per cent)
- ii) Union recognition/ on-site rep not involved in EO (3.2 per cent)
- iii) Union recognition/ no on-site rep (9.8 per cent)
- iv) Non-union workplaces (86.7 per cent)

This classification enables an analysis of whether workplaces with union recognition and an on-site rep involved in EO are more likely to have adopted the EO policies and practices described above than are workplaces with an on-site rep that is not involved in EO, workplaces with union recognition but no on-site rep, and non-union workplaces.¹

The categorisation above is, perhaps, interesting in itself in that it identifies that in unionised workplaces where there is on-site representation, only 8 per cent of these reps are involved in EO. Although it must be kept in mind that this figure relates to unionised workplaces in which there is only one rep and where there is no influence from reps from outside the workplace, the suggestion is nevertheless that EO, in 2004, was not an issue that featured on the agenda of many union reps.

In terms of the estimation technique used, given the dichotomous nature of the dependent variables in the analysis, the association between union recognition, the presence of workplace reps and negotiation/ consultation over EO policies and practices is evaluated using probit maximum likelihood analysis. A range of factors that might affect the association between unionisation and the adoption of EO policies and practices are held constant within the equations. These controls include workplace size, SIC major group, organisation size, public sector, national ownership, workplace age, single independent workplace, financial performance and workforce characteristics (the proportion of the workforce that is: female; from an ethnic minority background; disabled; and 50 years old

or older). The data in the multivariate analysis are weighted by the inverse of each workplace's probability of selection into the sample. This is essential if unbiased population estimates are to be obtained.

Results

The Relationship Between Union Recognition, On-Site Union Representation and Bargaining/Consultation and the Presence of EO policies

This section reports the relationship between three aspects of unionisation (trade union recognition; on-site union representation; and bargaining or consultation with unions over equality) and the presence of a formal, written EO policy that makes explicit reference to gender, race, disability and age. Table 1 presents the results. There is no evidence to suggest that formal, written EO policies are more prevalent in workplaces with union recognition than elsewhere. However, EO policies with regard to gender, race, disability and age are more prevalent in workplaces with an on-site union rep involved in EO matters than in unionised workplaces with no on-site representation (though the association is weak where gender policies are concerned). By contrast, in workplaces with an on-site rep not involved in EO matters, there is no indication that EO policies are any more prevalent. There is also no evidence that formal, written EO policies are any more prevalent in workplaces within which managers negotiate and consult with unions when deciding EO issues than in workplaces where the union is not involved when managers make EO decisions.

Table 1: Association between union recognition, union representation and bargaining/ consultation and the presence of an EO policy

	Presence of a formal written policy on EO policy with explicit reference to treatment or discrimination on the grounds of:			
	Gender	Race	Disability	Age
Union recognition	0.226 (0.209)	0.305 (0.215)	0.270 (0.205)	0.193 (0.175)
F	9.87	10.65	10.37	8.75
Prob>F	0.000	0.000	0.000	0.000
N	1687	1687	1687	1687

<i>Reference category: Recognition/no rep</i>				
Recognition/union rep involved in EO	1.234 (0.673)*	1.560 (0.620)**	1.738 (0.746)**	1.694 (0.579)***
Recognition/rep not involved	0.448 (0.392)	0.707 (0.452)	0.351 (0.416)	-0.199 (0.357)
Non-union	-0.081 (0.273)	-0.103 (0.273)	-0.131 (0.275)	-0.140 (0.233)
F	6.57	7.13	6.77	6.43
Prob>F	0.000	0.000	0.000	0.000
N	1087	1087	1087	1087

<i>Reference category: Union recognition/not involved in EO</i>				
Negotiation over EO	-0.158 (0.435)	-0.082 (0.471)	-0.124 (0.432)	-0.299 (0.345)
Consultation over EO	0.064 (0.356)	0.251 (0.351)	0.198 (0.346)	0.532 (0.310)**
Union informed over EO	0.159 (0.339)	0.207 (0.330)	0.099 (0.332)	0.099 (0.320)
Non-union	-0.203 (0.306)	-0.207 (0.302)	-0.208 (0.294)	-0.045 (0.267)
F	9.27	10.10	9.64	8.15
Prob>F	0.000	0.000	0.000	0.000
N	1687	1687	1687	1687

Notes:

Survey ordered probit analysis.

Co-efficients given, standard errors in brackets.

*** significant at 1 per cent; ** significant at 5 per cent; * significant at 10 per cent

Controls include: workplace size, SIC major group, organisation size, public sector, national ownership, workplace age, single independent workplace, financial performance. The equations also control for the following workforce characteristics: proportion of workforce female (column 1); proportion of workforce ethnic minority (column 2); proportion of workforce disabled (column 3); proportion of workforce 50 years old or older (column 4).

The Relationship Between Union Recognition, On-Site Union Representation and Bargaining/Consultation and the Presence of EO practices

Although the previous section suggests that formal, written EO policies are no more prevalent in workplaces with union recognition, it may nevertheless be the case that the EO policies in place in unionised workplaces are more likely to be policies of substance. As argued by Hoque and Noon (2004), there is considerable evidence that many EO policies in Britain are little more than an 'empty shell', with little in terms of substance with regard to supporting EO practices. Given this, the remainder of the analysis seeks to identify whether a range of EO practices are more prevalent in workplaces with union recognition, in workplaces with an on-site rep involved in EO matters, and in workplaces where managers negotiate or consult on EO issues.

Recruitment and selection

Table 2 explores whether recruitment and selection is monitored and reviewed to identify indirect discrimination by gender, race, disability and age. The results suggest that, overall, selection procedures are more likely to be monitored and reviewed to identify indirect discrimination in workplaces with union recognition than in non-union workplaces (although the association is only at the 10 per cent level where recruitment and selection reviews by gender are concerned). There is, however, no evidence to suggest that recruitment and selection procedures are more likely to be monitored or reviewed in workplaces with an on-site rep involved in EO matters than in other unionised workplaces.

There is significant evidence, however, pointing to the importance of negotiation over EO, especially where recruitment and selection monitoring is concerned. In workplaces where negotiation over EO occurs, recruitment and selection procedures are more likely to be monitored by gender, race, disability and age than in workplaces where the union is not involved in EO decision-making. The magnitude of these effects is substantial. For example, before controls are added, 60 per cent of workplaces in which negotiation over EO occurs monitor recruitment and selection by gender. This compares with 45 per cent of workplaces where managers consult with unions on EO, 40 per cent where unions are informed on EO decisions, 22 per cent where unions are not involved in EO decision-making and 12 per cent of non-union workplaces. It is also perhaps notable that while negotiation would appear important, there is less evidence to suggest that consultation on EO has the same effect, with recruitment and selection monitoring by gender, race and disability (but not age) being only slightly more prevalent (at the 10 per cent level) in workplaces within which consultation on EO occurs than in workplaces in which the union is not involved in EO decision-making. It is also perhaps notable that where there is union recognition but the union is not involved at all in EO decision-making, recruitment and selection monitoring is no more prevalent than in non-union workplaces.

Where reviews of recruitment and selection procedures to identify indirect discrimination are concerned, the association between union recognition and recruitment and selection reviews holds in instances where consultation or negotiation over EO occurs, and also in instances where they are informed over EO (although the association with recruitment and selection reviews to identify indirect discrimination by disability is weak). Again, the differences are large. For example, reviews of recruitment and selection procedures by gender have occurred in 49 per cent of workplaces within which negotiation over EO takes

place, in comparison with only 12 per cent of workplaces where the union is not involved in EO decision-making and 10 per cent of non-union workplaces. It is notable that where unions are not involved in EO decision-making, the likelihood of recruitment and selection reviews taking place is no higher than in non-union workplaces. Indeed, recruitment and selection reviews to identify indirect discrimination by age are *more* likely to occur in non-union workplaces than in workplaces where there is union recognition but the union is not involved in EO decision-making.

Overall, therefore, the results suggest that there is an important association between union recognition and the likelihood that recruitment and selection procedures are either monitored or reviewed to identify indirect discrimination. This association exists in particular in instances where unions are involved in EO decision-making, and in particular where negotiation over EO takes place.

Table 2: Association between union recognition, union representation and bargaining/ consultation and recruitment and selection monitoring/ reviewing

	Recruitment and selection monitored by:			
	Gender	Race	Disability	Age
Union recognition	0.481 (0.181)***	0.459 (0.184)**	0.443 (0.180)**	0.369 (0.171)**
F	8.49	9.19	8.33	3.68
Prob>F	0.000	0.000	0.000	0.000
N	1687	1687	1687	1687

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<i>Reference category: Recognition/no rep</i>				
Recognition/union rep involved in EO	0.096 (0.362)	-0.080 (0.341)	0.056 (0.352)	0.190 (0.376)
Recognition/rep not involved	0.179 (0.373)	0.430 (0.338)	0.474 (0.337)	-0.445 (0.311)
Non-union	-0.297 (0.219)	-0.256 (0.223)	-0.237 (0.223)	-0.373 (0.214)*
F	4.70	5.31	4.92	2.22
Prob>F	0.000	0.000	0.000	0.000
N	1087	1087	1087	1087

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<i>Reference category: Union recognition/not involved</i>				
Negotiation	0.952 (0.338)***	1.049 (0.333)***	1.230 (0.344)***	0.707 (0.316)**
Consultation	0.488 (0.266)*	0.445 (0.271)*	0.553 (0.283)*	0.379 (0.270)
Union informed	0.396 (0.317)	0.310 (0.326)	0.594 (0.325)*	0.350 (0.317)
Non-union	-0.074 (0.251)	-0.070 (0.258)	0.072 (0.265)	-0.061 (0.250)
F	8.05	8.87	8.33	3.42
Prob>F	0.000	0.000	0.000	0.000
N	1687	1687	1687	1687

	Recruitment and selection procedures reviewed to identify indirect discrimination by:			
	Gender	Race	Disability	Age
Union recognition	0.323 (0.176)*	0.362 (0.173)**	0.377 (0.181)**	0.423 (0.175)**
F	7.65	7.34	7.79	6.96
Prob>F	0.000	0.000	0.000	0.000
N	1687	1687	1687	1687

<i>Reference category: Recognition/no rep</i>				
Recognition/union rep involved in EO	0.264 (0.409)	0.189 (0.367)	0.252 (0.404)	0.406 (0.397)
Recognition/rep not involved	0.163 (0.324)	0.132 (0.329)	0.123 (0.340)	0.399 (0.334)
Non-union	-0.131 (0.231)	-0.169 (0.225)	-0.178 (0.239)	-0.249 (0.223)
F	5.33	5.04	5.36	5.34

Prob>F	0.000	0.000	0.000	0.000
N	1087	1087	1087	1087

<i>Reference category:</i>				
<i>Union recognition/not involved</i>				
Negotiation	1.163 (0.323)***	1.159 (0.320)***	1.146 (0.337)***	1.581 (0.332)***
Consultation	0.964 (0.289)***	0.912 (0.280)***	0.895 (0.301)***	1.234 (0.293)***
Union informed	0.738 (0.325)**	0.738 (0.321)**	0.613 (0.341)*	1.170 (0.337)***
Non-union	0.375 (0.273)	0.310 (0.266)	0.264 (0.293)	0.569 (0.272)**
F	7.23	7.09	7.32	7.19
Prob>F	0.000	0.000	0.000	0.000
N	1687	1687	1687	1687

Notes:

Survey ordered probit analysis.

Co-efficients given, standard errors in brackets.

*** significant at 1 per cent; ** significant at 5 per cent; * significant at 10 per cent

Controls as described in table 1. The equations also control for the following workforce characteristics: proportion of workforce female (column 1); proportion of workforce ethnic minority (column 2); proportion of workforce disabled (column 3); proportion of workforce 50 years old or older (column 4).

Turning to whether special procedures are in place to encourage applications from disadvantaged groups, table 3 suggests that special procedures to encourage applications from women in general, ethnic minorities and disabled people are more prevalent in workplaces with union recognition than in non-union workplaces, but procedures to encourage applications from women returning to work after having children and older workers are no more prevalent.

Turning to the importance of on-site representation, special procedures to encourage applications from disabled people and older workers are more prevalent in workplaces with an on-site rep involved in EO matters than in unionised workplaces with no on-site representation, and there is weak evidence (at the 10 per cent significance level) that special procedures to encourage women in general and ethnic minorities are more prevalent. There is no evidence, by contrast, to suggest that special procedures to encourage applications from disadvantaged groups are more prevalent in unionised workplaces with an on-site rep that is not involved in EO than in unionised workplaces with no on-site representation. Indeed, special procedures to encourage women in general are *less* prevalent.

There is also significant evidence pointing to the importance of negotiation over EO. Special procedures to encourage applications from women returning to work after having children, women in general, ethnic minorities and older workers are more prevalent in workplaces where negotiation over EO occurs than in workplaces where the union is not involved in EO decision-making. Although there is no evidence that negotiation over EO makes any difference to the prevalence of special procedures to encourage applications from older workers, the results overall again point to the importance of negotiation over EO. The differences between workplaces where negotiation occurs and other workplaces are substantial. For example, special procedures are in place to encourage applications from women returning to work after having children in 38 per cent of workplaces where negotiation over EO occurs, but in only 16 per cent of workplaces where consultation occurs, 4 per cent of workplaces where unions are informed of EO decisions, 11 per cent of workplaces where unions are not involved in EO decision-making and 9 per cent of non-union workplaces.

In contrast with the results where negotiation is concerned, there is little evidence to suggest that special procedures are any more prevalent where consultation occurs. Indeed, while special procedures to encourage applications from older workers are more prevalent

in workplaces where consultation over EO occurs than in workplaces where the union is not involved in EO decision-making, special procedures to encourage applications from older workers are *less* prevalent.

Table 3: Association between union recognition, union representation and bargaining/ consultation and recruitment and special procedures to encourage applications from disadvantaged groups

	Special procedures in place to encourage applications from:							
	Women returning to work after having children		Women in general		Ethnic minorities		Disabled people	
Union recognition	0.251	(0.209)	0.480	(0.210)**	0.859	(0.198)***	1.315	(0.213)***
F	3.43		3.62		10.03		9.50	
Prob>F	0.000		0.000		0.000		0.000	
N	1687		1687		1687		1687	

<i>Reference category: Recognition/no rep</i>								
Recognition/union rep involved in EO	-0.052	(0.468)	1.232	(0.749)*	0.803	(0.482)*	1.936	(0.880)**
Recognition/rep not involved	0.036	(0.396)	-0.998	(0.472)**	0.308	(0.401)	-0.168	(0.367)
Non-union	-0.359	(0.264)	-0.669	(0.241)***	-0.753	(0.236)***	-1.236	(0.246)***
F	2.51		3.05		5.58		5.56	
Prob>F	0.001		0.000		0.000		0.000	
N	1087		1087		1087		1087	

<i>Reference category: Union recognition/not involved</i>								
Negotiation	0.844	(0.345)**	0.733	(0.362)**	0.967	(0.342)***	0.953	(0.339)***
Consultation	0.087	(0.307)	0.018	(0.257)	0.231	(0.275)	0.575	(0.282)**
Union informed	-0.509	(0.287)*	0.117	(0.314)	0.136	(0.322)	0.488	(0.334)
Non-union	-0.120	(0.262)	-0.303	(0.280)	-0.579	(0.264)**	-0.880	(0.271)***
F	3.43		3.50		9.41		8.78	
Prob>F	0.000		0.000		0.000		0.000	
N	1687		1687		1687		1687	

Older workers								
Union recognition	0.054	(0.201)						
F	3.56							
Prob>F	0.000							
N	1687							

<i>Reference category: Recognition/no rep</i>								
Recognition/union rep involved in EO	1.532	(0.769)**						
Recognition/rep not involved	-0.319	(0.368)						
Non-union	-0.144	(0.246)						
F	2.80							
Prob>F	0.000							
N	1087							

<i>Reference category: Union recognition/not involved</i>								
Negotiation	0.573	(0.366)						
Consultation	-0.542	(0.270)**						
Union informed	-0.197	(0.331)						
Non-union	-0.157	(0.262)						
F	3.49							
Prob>F	0.000							
N	1687							

Notes:

Survey ordered probit analysis.

Co-efficients given, standard errors in brackets.

*** significant at 1 per cent; ** significant at 5 per cent; * significant at 10 per cent

Controls as described in table 1. The equations also control for the following workforce characteristics: proportion of workforce female (columns 1 and 2); proportion of workforce ethnic minority (column 3); proportion of workforce disabled (column 4); proportion of workforce 50 years old or older (column 5).

Promotions

Table 4 explores whether promotions are monitored and reviewed to identify indirect discrimination by gender, race, disability and age. Turning first to promotion monitoring, as demonstrated by the top half of the table, the results suggest that overall, promotion monitoring is more prevalent in workplaces with union recognition than in non-union workplaces. However, promotion monitoring is no more likely to occur in unionised workplaces with an on-site rep involved in EO than in unionised workplaces without on-site representation.

The results do, however, suggest that promotion monitoring is more prevalent in instances where negotiation over EO occurs or where unions are consulted over EO (although the effect is weak in the case of negotiation where promotion monitoring by gender and race is concerned). The differences between workplaces in which negotiation or consultation over EO occur and other workplaces are substantial. Promotions are monitored by disability, for example, in 32 per cent of workplaces where negotiation over EO takes place and 26 per cent of workplaces where consultation occurs, but in only 7 per cent of workplaces where there is union recognition but the union is not involved in EO decision-making and 4 per cent of non-union workplaces. It is notable that promotion monitoring in relation to gender, race disability or age is no more likely to occur in instances where the union is not involved in EO decision-making than in non-union workplaces.

Turning to whether promotion procedures are reviewed to identify indirect discrimination, the results in the bottom half of table 4 suggest that such reviews are more prevalent in workplaces with union recognition than in non-union workplaces, although the association is weak (being significant at only 10 per cent for all four measures). There is no evidence to suggest that promotion procedures are more likely to be reviewed in workplaces with an on-site rep involved in EO matters than unionised workplaces with no on-site rep. There is, however, further evidence pointing to the importance of negotiation and consultation over EO, with promotion procedures being more likely to be reviewed in workplaces where negotiation over EO occurs or where unions are consulted over EO than in workplaces where the union is not involved in EO decision-making (although the association is weak in the case of negotiation where promotion reviews by gender are concerned). In terms of the size of the differences, promotion procedures are reviewed by disability, for example, in 23 per cent of workplaces where negotiation over EO takes place, in 33 per cent of workplaces where consultation occurs, but only 15 per cent of workplaces where unions are informed of EO decisions, 8 per cent of workplaces where unions are not involved in EO decision-making and 5 per cent of non-union workplaces.

Again, it is notable that promotion procedures are no more likely to be reviewed to identify indirect discrimination in instances where the union is not involved in EO decision-making than in non-union workplaces. Indeed, promotion decisions are *more* likely to be reviewed to identify indirect discrimination in non-union workplaces than in workplaces that have union recognition but the union is not involved in EO decision-making.

Table 4: Association between union recognition, union representation and bargaining/ consultation and promotion monitoring/ reviewing

	Promotions monitored by:							
	Gender		Race		Disability		Age	
Union recognition	0.565	(0.201)***	0.586	(0.206)***	0.556	(0.206)***	0.447	(0.223)**
F	8.39		10.41		9.74		8.02	
Prob>F	0.000		0.000		0.000		0.000	
N	1687		1687		1687		1687	
<hr/>								
<i>Reference category: Recognition/no rep</i>								
Recognition/union rep involved in EO	0.042	(0.658)	-0.200	(0.518)	0.051	(0.621)	0.096	(0.625)
Recognition/rep not involved	-0.022	(0.381)	0.032	(0.375)	0.093	(0.371)	0.068	(0.381)
Non-union	-0.375	(0.249)	-0.344	(0.260)	-0.388	(0.260)	-0.398	(0.277)
F	5.17		5.38		5.25		4.93	
Prob>F	0.000		0.000		0.000		0.000	
N	1087		1087		1087		1087	
<hr/>								
<i>Reference category: Union recognition/not involved</i>								
Negotiation	0.655	(0.370)*	0.716	(0.370)*	0.988	(0.388)**	1.276	(0.406)***
Consultation	0.608	(0.308)**	0.690	(0.315)**	0.825	(0.338)**	1.119	(0.340)***
Union informed	0.383	(0.368)	0.452	(0.398)	0.643	(0.393)	0.696	(0.405)*
Non-union	-0.170	(0.302)	-0.129	(0.322)	0.030	(0.341)	0.380	(0.310)
F	7.71		9.60		9.08		7.53	
Prob>F	0.000		0.000		0.000		0.000	
N	1687		1687		1687		1687	

	Promotion procedures reviewed to identify indirect discrimination by:							
	Gender		Race		Disability		Age	
Union recognition	0.325	(0.180)*	0.339	(0.185)*	0.352	(0.186)*	0.329	(0.196)*
F	6.59		7.92		8.83		6.46	
Prob>F	0.000		0.000		0.000		0.000	
N	1687		1687		1687		1687	
<hr/>								
<i>Reference category: Recognition/no rep</i>								
Recognition/union rep involved in EO	-0.112	(0.538)	-0.304	(0.461)	-0.175	(0.529)	-0.051	(0.580)
Recognition/rep not involved	-0.478	(0.371)	-0.426	(0.375)	-0.534	(0.374)	-0.127	(0.352)
Non-union	-0.264	(0.235)	-0.260	(0.243)	-0.310	(0.239)	-0.232	(0.253)
F	4.03		4.65		5.48		4.96	
Prob>F	0.000		0.000		0.000		0.000	
N	1087		1087		1087		1087	
<hr/>								
<i>Reference category: Union recognition/not involved</i>								
Negotiation	0.614	(0.341)*	0.758	(0.329)**	0.686	(0.342)**	1.116	(0.415)***
Consultation	0.984	(0.292)***	1.057	(0.279)***	0.975	(0.299)***	1.444	(0.359)***
Union informed	0.310	(0.371)	0.407	(0.378)	0.331	(0.378)	0.908	(0.422)**
Non-union	0.241	(0.256)	0.312	(0.244)	0.235	(0.264)	0.680	(0.328)**
F	6.26		7.41		8.10		6.35	
Prob>F	0.000		0.000		0.000		0.000	
N	1687		1687		1687		1687	

Notes:

Survey ordered probit analysis.

Co-efficients given, standard errors in brackets.

*** significant at 1 per cent; ** significant at 5 per cent; * significant at 10 per cent

Controls as described in table 1. The equations also control for the following workforce characteristics: proportion of workforce female (column 1); proportion of workforce ethnic minority (column 2); proportion of workforce disabled (column 3); proportion of workforce 50 years old or older (column 4).

Pay

Table 5 explores whether relative pay rates are reviewed by gender, race, disability and age. The results suggest that reviews of this nature are more prevalent in relation to race and slightly more prevalent (at the 10 per cent significance level) in relation to disability in

workplaces with union recognition than in non-union workplaces. They are, however, no more prevalent with regard to gender or age. There is no evidence to suggest that pay rates are more likely to be reviewed in workplaces with an on-site rep involved in EO than in other unionised workplaces.

There is, however, evidence pointing to the importance of negotiation and consultation over EO. Reviews of relative pay rates by race, disability and age are more prevalent in workplaces where negotiation or consultation over EO occurs (though the association is weak in the case of negotiation where reviews of relative pay rates by age are concerned). Again, the differences between workplaces where negotiation or consultation over EO occurs and those where it does not occur are substantial. For example, reviews of relative pay rates by race occur in 16 per cent of workplaces where there is negotiation over EO, 17 per cent of workplaces where there is consultation over EO, but only 1 per cent of workplaces where the union is only informed about EO decision, 3 per cent of workplaces where the union is not involved at all in EO decision-making, and 2 per cent of non-union workplaces.

It is notable that, once again, there is no evidence to suggest that reviews of relative pay rates by gender, race, disability or age are more prevalent in workplaces with union recognition but the union is not involved in EO decision-making than in non-union workplaces.

Table 5: Association between union recognition, union representation and bargaining/ consultation and reviews of relative pay rates

	Reviews of relative pay rates by:							
	Gender		Race		Disability		Age	
Union recognition	0.076	(0.262)	0.492	(0.228)**	0.472	(0.256)*	0.333	(0.205)
F	9.52		8.12		7.96		5.43	
Prob>F	0.000		0.000		0.000		0.000	
N	1687		1687		1687		1687	
<hr/>								
<i>Reference category: Recognition/no rep</i>								
Recognition/union rep involved in EO	-0.025	(0.676)	0.056	(0.584)	0.330	(0.674)	0.701	(0.656)
Recognition/rep not involved	-0.323	(0.371)	-0.027	(0.399)	-0.182	(0.393)	-0.149	(0.382)
Non-union	-0.170	(0.335)	-0.508	(0.284)*	-0.573	(0.289)**	-0.506	(0.262)*
F	7.86		5.29		5.12		4.20	
Prob>F	0.000		0.000		0.000		0.000	
N	1087		1087		1087		1087	
<hr/>								
<i>Reference category: Union recognition/not involved</i>								
Negotiation	0.308	(0.367)	1.079	(0.379)***	0.874	(0.432)**	0.644	(0.388)*
Consultation	0.464	(0.326)	1.293	(0.332)***	1.079	(0.400)***	0.741	(0.332)**
Union informed	-0.623	(0.336)*	-0.425	(0.370)	-0.378	(0.395)	-0.575	(0.328)**
Non-union	0.092	(0.325)	0.276	(0.322)	0.184	(0.398)	0.027	(0.311)
F	9.24		8.69		8.82		5.88	
Prob>F	0.000		0.000		0.000		0.000	
N	1687		1687		1687		1687	

Notes:

Survey ordered probit analysis.

Co-efficients given, standard errors in brackets.

*** significant at 1 per cent; ** significant at 5 per cent; * significant at 10 per cent

Controls as described in table 1. The equations also control for the following workforce characteristics: proportion of workforce female (column 1); proportion of workforce ethnic minority (column 2); proportion of workforce disabled (column 3); proportion of workforce 50 years old or older (column 4).

Disability assessments and adjustments

Table 6 explores whether formal assessments are made of the extent to which the workplace is accessible to employees or job applicants with disabilities, and whether adjustments have been made at the workplace to accommodate disabled people. The results suggest that formal assessments are more prevalent and adjustments are more likely to have been made in workplaces with union recognition than in non-union workplaces. There is no evidence that assessments are more likely to have been carried out or adjustments are more likely to have been made in workplaces with an on-site rep involved in EO than in unionised workplaces with no on-site representation. There is also no evidence however to suggest that negotiation over EO is important (indeed, adjustments are slightly *less* likely to have been made in workplace where negotiation over EO occurs than in workplaces where the union is not involved in EO decision-making). Where consultation is concerned, formal assessments are more prevalent in workplaces where unions are consulted over EO, but there is no evidence than adjustments are more likely to have been made.

Table 6: Association between union recognition, union representation and bargaining/ consultation and disability assessments and adjustments

	Formal assessment made of the extent to which the workplace is accessible to employees or job applicants with disabilities		Adjustments made at the workplace to accommodate disabled employees	
Union recognition	0.330	(0.163)**	0.471	(0.185)**
F	4.60		8.35	
Prob>F	0.000		0.000	
N	1687		1687	
<hr/>				
<i>Reference category: Recognition/no rep</i>				
Recognition/union rep involved in EO	-0.569	(0.448)	-0.472	(0.397)
Recognition/rep not involved	-0.440	(0.345)	-0.667	(0.357)*
Non-union	-0.530	(0.229)**	-0.637	(0.248)**
F	2.99		4.32	
Prob>F	0.000		0.000	
N	1087		1087	
<hr/>				
<i>Reference category: Union recognition/not involved</i>				
Negotiation	0.324	(0.318)	-0.528	(0.271)*
Consultation	0.542	(0.273)**	0.099	(0.281)
Union informed	-0.032	(0.286)	-0.216	(0.267)
Non-union	-0.114	(0.230)	-0.532	(0.239)**
F	4.42		7.73	
Prob>F	0.000		0.000	
N	1687		1687	

Notes:

Survey ordered probit analysis.

Co-efficients given, standard errors in brackets.

*** significant at 1 per cent; ** significant at 5 per cent; * significant at 10 per cent

Controls as described in table 1. Both columns also control for proportion of workforce disabled.

Flexible working and family-friendly practices

Our final tests relate to the relationship between unionisation and a range of flexible working and family-friendly practices. The evidence presented in Table 7 suggests that four of the eight practices asked about are more prevalent in workplaces with union recognition than in non-union workplaces (workplace nursery, financial help with childcare, leave for carers of older adults and maternity leave at full rate of pay). However, working at or from

home in normal working hours is slightly less prevalent (at the 10 per cent significance level). There is no evidence, however, that flexible working and family-friendly practices are more prevalent in workplaces with an on-site rep involved in EO than in unionised workplaces with no on-site representation. Indeed, workplace nurseries are *less* prevalent in the former than the latter. Perhaps surprisingly, two of the practices (job sharing and term-time only contracts) are *less* prevalent in workplaces with an on-site rep not involved in EO than in unionised workplaces with no on-site representation, and a further three practices (working at or from home in normal working hours, flexitime and workplace nursery) are slightly less prevalent (at the 10 per cent significance level) in workplaces with an on-site rep not involved in EO than in unionised workplaces with no on-site representation.

There is, however, evidence suggesting the adoption of flexible working and family-friendly practices is higher where unions are consulted over EO. Four of the eight flexible working/ family friendly practices are more prevalent in workplaces where unions are consulted over EO than in workplaces where the union is not involved in EO decision-making (workplace nursery, financial help with childcare, maternity leave at full rate of pay and leave for carers of older adults, though in the latter case the association is only at the 10 per cent significance level). Where negotiation is concerned, workplace nurseries are more prevalent in workplaces where negotiation over EO occurs than in workplaces where the union is not involved in EO decision-making. Beyond this, there is no evidence to suggest that flexible working or family friendly practices are more prevalent in workplaces where negotiation over EO occurs than in workplaces where the union is not involved in decision-making.

Table 7: Association between union recognition, union representation and bargaining/ consultation and flexible working/ family-friendly practices

	Working at or from home in normal working hours		Job sharing		Flexitime		Term-time only contracts	
Union recognition	-0.324	(0.176)*	0.240	(0.173)	0.237	(0.185)	0.053	(0.215)
F	6.83		7.70		3.31		11.09	
Prob>F	0.000		0.000		0.000		0.000	
N	1687		1687		1687		1687	
<hr/>								
<i>Reference category: Recognition/no rep</i>								
Recognition/union rep involved in EO	-0.042	(0.467)	-0.299	(0.369)	-0.004	(0.457)	-0.726	(0.466)
Recognition/rep not involved	-0.670	(0.351)*	-1.006	(0.280)***	-0.618	(0.352)*	-0.630	(0.310)**
Non-union	0.232	(0.233)	-0.339	(0.235)	-0.500	(0.235)**	-0.301	(0.274)
F	4.99		4.29		1.66		6.43	
Prob>F	0.000		0.000		0.000		0.000	
N	1087		1087		1087		1087	
<hr/>								
<i>Reference category: Union recognition/not involved</i>								
Negotiation	0.355	(0.307)	0.545	(0.340)	0.335	(0.342)	0.295	(0.369)
Consultation	0.174	(0.247)	0.446	(0.271)	0.159	(0.300)	0.147	(0.358)
Union informed	0.264	(0.293)	0.569	(0.269)**	-0.754	(0.301)**	0.010	(0.397)
Non-union	0.501	(0.217)**	0.111	(0.221)	-0.256	(0.266)	0.040	(0.368)
F	6.39		7.38		3.20		10.13	
Prob>F	0.000		0.000		0.000		0.000	
N	1687		1687		1687		1687	

	Workplace nursery		Financial help with childcare		Leave for carers of older adults		Maternity leave at full rate of pay	
Union recognition	0.492	(0.235)**	0.515	(0.234)**	0.395	(0.195)**	0.484	(0.163)**
F	10.71		8.72		7.70		4.37	
Prob>F	0.000		0.000		0.000		0.000	
N	1687		1687		1687		1687	
<hr/>								
<i>Reference category: Recognition/no rep</i>								
Recognition/union rep involved in EO	-1.734	(0.469)***	0.588	(0.650)	-0.586	(0.462)	-0.495	(0.578)
Recognition/rep not involved	-1.008	(0.547)*	0.509	(0.371)	-0.457	(0.382)	-0.616	(0.377)
Non-union	-0.577	(0.299)*	-0.428	(0.371)	-0.372	(0.238)	-0.620	(0.214)**
F	5.73		5.12		5.09		3.29	
Prob>F	0.000		0.000		0.000		0.000	
N	1087		1087		1087		1087	
<hr/>								
<i>Reference category: Union recognition/not involved</i>								
Negotiation	1.189	(0.379)***	0.700	(0.464)	0.734	(0.461)	0.345	(0.350)
Consultation	1.360	(0.351)***	0.921	(0.423)**	0.675	(0.401)*	0.678	(0.275)**
Union informed	1.052	(0.382)***	0.915	(0.504)*	0.450	(0.434)	0.095	(0.317)
Non-union	0.471	(0.287)*	0.180	(0.373)	0.098	(0.378)	-0.211	(0.228)
F	9.78		8.16		7.68		4.25	
Prob>F	0.000		0.000		0.000		0.000	
N	1687		1687		1687		1687	

Notes:

Survey ordered probit analysis.

Co-efficients given, standard errors in brackets.

*** significant at 1 per cent; ** significant at 5 per cent; * significant at 10 per cent

Controls as described in table 1. All columns also control for the proportion of workforce female with the exception of the 'leave for carers of older adults' equation.

Discussion and conclusion

This paper sought to identify whether both formal, written EO policies and also a range of EO practices are more prevalent in workplaces with union recognition than in non-union workplaces. It also sought to establish whether such policies and practices are more prevalent in workplaces with on-site union representation, or where negotiation or consultation over EO takes place.

Where the existence of formal, written EO policies is concerned, the analysis found that such policies were no more prevalent in workplaces with union recognition than in non-union workplaces overall. They were, however, more prevalent in workplaces with an on-site rep involved in EO matters. There was no evidence that EO policies were more prevalent in workplaces where negotiation or consultation with the union over EO occurs.

The analysis did, however, find the prevalence of a range of EO practices to be higher in workplaces with union recognition than in non-union workplaces. It was not the case though that EO practices were more prevalent in all workplaces with union recognition. Indeed, the results pointed in particular to the importance of negotiation over EO, with EO practices relating to recruitment and selection, promotions and pay being particularly more prevalent in workplaces where negotiation occurs. A similar (if weaker) pattern emerged with regard to workplaces where managers consult with unions over EO.

It was not the case, however, that all of the EO practices asked about were more prevalent where negotiation over EO occurs. Indeed, the prevalence of disability assessments and adjustments and also the prevalence of flexible working and family-friendly practices is barely any different in workplaces where negotiation occurs than in workplaces with union recognition but the union is not involved in EO decision-making.

Nevertheless, it is notable that in unionised workplaces where managers simply informed unions of EO decisions once they had been made or did not involve unions at all in EO decision-making, the extent of adoption of EO practices was barely any different than in non-union workplaces. This further points to the importance of union involvement in EO decision-making. In instances where they are involved either through negotiation or consultation, EO practices are more prevalent, but in instances where they are not involved, EO practices are no more prevalent than in non-union workplaces. However, given the apparent importance of negotiation and consultation between unions and managers over EO, it is perhaps worrying that negotiation over EO occurs in only 16 per cent of workplaces with union recognition. It is perhaps more encouraging that consultation occurs in a further 44 per cent of workplaces with recognition, yet this still leaves a further 40 per cent of workplaces in which recognised unions are only informed on EO decisions or are not involved in EO decision-making at all.

Overall, therefore, these results suggest that unions may well be having a significant influence on the EO practices adopted by British employers, though it would appear for this influence to emerge, it is necessary that unions either negotiate over EO or that managers consult with unions when making decisions over EO. This has a number of important implications. First, many unions in recent times have made increasing commitments to ensuring equality of opportunity for the members they represent. The findings suggest that if these unions are serious about these commitments, it is essential that they ensure that EO is on the bargaining agenda and that negotiating officers make bargaining over EO a priority. Should they do so, the results here suggest that this could well have a significant influence on the EO practices employers subsequently adopt.

Second, the government in recent times has increasingly pointed to the importance of the introduction of flexible and family-friendly working practices, not least given the business benefits in terms of boosting workforce morale and productivity that such practices have the capacity to generate. The results here suggest that such practices are particularly prevalent in instances where managers consult with unions over EO. This in turn suggests that if the government is serious in its commitment to encourage the adoption of flexible and family-friendly practices, it has an important role to play in encouraging employers to engage in genuine consultation with trade unions over their implementation. In instances where they are successful in encouraging employers to do so, the results here suggest that this could have a significant effect on the likelihood of such practices being adopted.

Third, it is perhaps notable that although formal, written EO policies were more prevalent in workplaces with an on-site rep involved in EO, there was very little evidence to suggest that EO practices were any more prevalent (the only exception being the prevalence of special procedures to encourage applications from disadvantaged groups). This suggests that while on-site reps involved in EO may well have played a role in encouraging the adoption of formal, written EO policies, there is very little evidence that they have also encouraged employers to ensure that these are policies of substance by introducing the types of EO practices one might expect a good EO employer to adopt. As such, while the results presented here suggest that unions are able to have a significant influence on workplace EO practice this would appear to be much more likely to be via bargaining structures rather than via on-site workplace representation per se.

These findings have implications in terms of the necessity for, and the likely impact of, the TUC's new equality representative initiative. The WERS survey was conducted in 2004, prior to the implementation of this initiative. By implication, therefore, none of the reps

within the WERS survey were formally designated ‘equality reps’. Given that the results point to the highly limited impact that general workplace reps would appear to have had in terms of influencing employer equality practice in Britain, this in turn suggests that in 2004 there was a significant gap in terms of on-site union representation specifically focused on workplace equality issues. This is a gap that equality reps have the potential to fill. When viewed in light of the results pointing to the importance of negotiation and consultation over EO, if equality reps increase the probability that negotiation and consultation occurs (by providing management with a dedicated rep to negotiate and consult over EO matters with), this suggests that they may well have the potential to have a significant influence over the EO practices adopted within British workplaces.

End Notes

¹ It is worth noting that the analysis is restricted to workplaces where there is only one on-site union rep. This is because in workplaces with more than one on-site rep, if the respondent has not been involved in EO themselves, it is possible that other reps may have been involved. Hence, if these workplaces are included in the sample, there is the possibility that they will be erroneously classified as workplaces where there is no on-site rep involvement in EO. In addition, there are a number of non-union workplaces within the WERS survey that have on-site union reps. These workplaces are also excluded from the analysis in order that a clear distinction can be made between workplaces with union recognition and on-site representation and non-union workplaces. Also, there are a number of workplaces where the management respondent stated that there is a union rep, but there was no corresponding worker rep respondent, hence it was not possible to identify whether the rep is involved in EO or not. These workplaces are also excluded from the analysis. In addition, there are a number of workplaces where members are represented by reps from another workplace. Again, as it is not possible to identify whether these reps are involved in EO, workplaces where such representation occurs are excluded from the analysis.

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Appendix table: Means of dependent and control variables

Dependent variables

Workplace has a formal written policy on EO or managing diversity that explicitly mentions equality of treatment or discrimination on the grounds of:

Gender	0.567
Race	0.557
Disability	0.541
Age	0.424

Recruitment and selection monitored by:

Gender	0.189
Ethnicity	0.187
Disability	0.187
Age	0.180

Recruitment and selection procedures reviewed to identify indirect discrimination by:

Gender	0.165
Ethnicity	0.175
Disability	0.166
Age	0.144

Special procedures to encourage applications from:

Women returning to work after having children	0.109
Women in general	0.069
Members of ethnic minority groups	0.084
Disabled people	0.093
Older workers	0.062

Promotions monitored by:

Gender	0.089
Ethnicity	0.087
Disability	0.081
Age	0.067

Promotion procedures reviewed to identify indirect discrimination by:

Gender	0.096
Ethnicity	0.097
Disability	0.093
Age	0.084

Relative pay rates reviewed by:

Gender	0.056
Ethnicity	0.038
Disability	0.032
Age	0.052

Formal assessment made of the extent to which the workplace is accessible to employees or job applicants with disabilities	0.486
Adjustments made at the workplace to accommodate disabled employees	0.223

Family friendly/flexible working practices in place for any employees at the workplace:

Working at or from home in normal working hours	0.256
Job sharing schemes (sharing a full time job with another employee)	0.249
Flexitime (no set start or finish times but an agreement to work a set number of hours per week or per month)	0.345
Working only during school or term-time	0.125
Workplace nursery or nursery linked with workplace	0.021
Financial help with childcare (e.g. loans, repayable contributions to fees for childcare outside of the workplace, subsidised places not located at the establishment)	0.058

A specific period of leave for carers of older adults	0.062
Maternity leave at normal, full rate of pay	0.580

Control variables

Workplace size:

5-9 employees	0.425
10-24 employees	0.336
25-49 employees	0.124
50-99 employees	0.064
100-199 employees	0.030
200-499 employees	0.016
500-999 employees	0.004
1000+ employees	0.002

Organisation size:

5-99 employees	0.387
100-999 employees	0.234
1000-9999 employees	0.199
10000 employees	0.179

SIC major group:

Manufacturing	0.110
Gas, electricity and water supply	0.001
Construction	0.040
Wholesale and retail trade	0.244
Hotels and restaurants	0.091
Transport, storage and communication	0.051
Financial intermediation	0.053
Real estate, renting	0.157
Public admin., defence, social security	0.017
Education	0.035
Health and social work	0.124
Other community, social, personal	0.075

Public sector	0.110
Single independent workplace	0.363

Financial performance:

No competition/ data	0.078
Above average financial performance	0.489
Average financial performance	0.353
Below average financial performance	0.080

National ownership:

UK owned	0.924
North American owned	0.035
EU owned	0.028
Rest of World	0.014

Workplace age:

0-4 years old	0.091
5-9 years old	0.159
10-19 years old	0.244
20+ years old	0.507

Proportion of workforce:

Female	0.556
Ethnic Minority	0.062
Disabled	0.010
50 years old or older	0.216

N=1687

Appendix 3

Employers and Equality Reps - An Interim List

Case Studies

These employers have agreed to be interviewed

Highways Dept – Walsall Council – rep Sharon Harding/ GMB

Principality Building Society – rep Anne Cockram/Unite

North Wales Health Trust – rep Jan Tomlinson/Unison

INEOS refinery, Grangemouth , Scotland- convenor Mark Lyon /Unite

Employers Who Are Giving Facility Time to Reps

In Wales

British gas

Bridgend CBC

Gwent police

Cardiff and Vale NHS Trust

Flintshire CBC

HMRC SE Wales

HMRC Llanishen

WAG, cathays Park

Assembly Commission

HMRC Wrexham

Catering Direct RCT Council

C&D Trust

Welsh Assembly, BT, Principality Building Society

Unite have negotiated facility time agreements with

Nottinghamshire Building Society, Principality Building Society, and Virgin Airlines Cabin Crew, Ford, TNT, Northern Rock, London Buses- Arriva

From the current TUC survey the following equality reps report having facility time from their employer.

Unite

Diageo Banbeath Industrial Estate Leven Fife Scotland

Fujitsu Services

Colindale

GKN Aerospace Services, Ferry Rd East Cowes, Isle of Wight, PO 326RA

Principality Building society

St Regis Paper Company Kemeley Site

Fife and Falkirk areas

ASLEF

London Midland Trains

CWU

BT

CSP

National Waiting Times Centre Board

UCU
University of Gloucestershire

Unison
Day Resource Centre, Kimbolton Rd, Bedford
Hillingdon Hospital
Taunton Deane Borough Council

PCS
Day Resource Centre, Kimbolton Rd, Bedford
DEFRA

RMT
Neasden Depot (LUL)
FBU
Castlemilk Fire Station

Union not known
Civic Centre Newcastle
These organisations are in negotiations with Unite about it – HSBC, Royal Bank of Scotland, Sainsbury's are considering it
NGSU equality reps have facility time with the Nationwide Building Society
The Shaw Trust support equality reps

Employers Who Have Equality Reps

From Unison
South West Region:

Careers South West
East Devon College
Devon County Council
Devon and Cornwall Police Authority
Poole Borough Council
Bristol City Council
University West of England
Hikmat BME Social Contact Centre

Northern Region:

Castlebeck Care
Cherry Knowle Hospital
City of Newcastle
Cleveland Police
Cleveland Police – Middlesbrough Station
Darlington Borough Council
Gateshead Housing Co
Middlesbrough Station
Mitie Cleaning North
NCC Waste Management
Newcastle College
NTW Trust

Oaklands Nursing Home
Prudhoe County High School
South Tyneside Council
St Georges Hospital
University Hospital of Hartlepool
University of North Tees
University of Sunderland

Wales

Gwent Police Abergavenny Police Station
Conwy Local Gov Ysgol Emrys Ap Iwan
Newport County St Julians Comprehensive
Neath Port Talbot Local Government The Forge Centre
Neath Port Talbot Local Government Laurels Resource Centre
NORTH EAST WALES NHS TRUST HM Stanley Hospital
NORTH EAST WALES NHS TRUST HM Roslin Mental Health Team
British Gas
Cardiff & Vale health Cardiff Royal Infirmary
City and County of Swansea Swansea County Council
Rhondda Cynon Taff Tonyrefail Day Centre
Rhondda Cynon Taff Clydach Court HFE
Welsh Assembly – Aberystwyth

From Unite

BAA , Heathrow; Barclays Bank, Leicester; Sunderland Council ; Lewes NHS pct;
Hallmark , Bradford ;Bifrangi UK, Sheffield; Kone Ltd, Sheffield; Royal Bank of Scotland,
Edinburgh; Principality , Cardiff ; University of Birmingham; HSBC, Birmingham; RBS
Ipswich; University of Durham; Brighton Health Care Trust; RBS, Southend; University of
Leicester; Barclaycard, Stockton on Tees; Medical Research Council, Cambridge; Jaguar
Cars, Coventry; Cape industrial services, Aberdeen; Barclays Bank, London, West
Drayton; Corus, Scunthorpe; Japan Airlines, Heathrow; Guardian newspapers, London;
BAE, Blackburn; HBOS, Dundee, Edinburgh ; Royal Mail, Halstead, Reading, Sheffield,
Glasgow, Worcester; Morethan2, Sunderland; H M Prison , North Allerton; Precision Disc
Castings, Poole; British Board of Film Classification, London; MoD, Telford; Huttons,
Bilericay; G.E. Aviation, Wolverhampton; Norfolk & Norwich University; Ashford & St
Peters hospital, Guildford; Virgin Atlantic Airways, Crawley; National Blood transfusion
service, London; Mears Ltd, Aycliffe; Cardiff County Council; Standard Life, Brighton;
Legal & General, Royal Sun Alliance, Sunderland