

UNION MODERNISATION FUND

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TUC – TRAINING EQUALITY REPS

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Introduction

The aim of unions, employers and government is to achieve a diverse and productive workforce reflecting the composition of today's society. Employers, for example, are increasingly aware of the need to develop flexible working systems and non-discriminatory pay and grading structures. To do this successfully employee engagement is essential. Discrimination law is complex and wide-ranging, and it is to the advantage of employers and employees to avoid expensive litigation and to have in place workplace practices that avoid discrimination and encourage diversity.

Why this project?

The TUC believes that union 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.

To be effective, it is crucial that equality reps are properly trained before they start the role. TUC training, which is widely respected, would provide the necessary knowledge and skills for these representatives to work with their members and employers.

Aims and objectives

The TUC's Round 2 UMF project started in April 2008 and ran for one year. Its overall aims were to train equality reps for their new role, and develop and promote this role within trade unions and the workplace. This translated into the following objectives:

- Develop, write and run a TUC course that would train equality reps across Great Britain
- Develop, write and run an online course for equality reps
- Train TUC Education tutors in the new materials
- Organise regional seminars for union officers to promote the role of the equality rep and the training programme
- Co-ordinate and share good practice between the other UMF Round 2 equality rep projects
- Evaluate the training
- Evaluate the initial impact of equality reps in the workplace.

Methodology and outcomes

The project comprised:

- an initial survey to find out numbers of equality reps and the extent of their training
- a focus group to look at existing courses
- development of a training course

- regional seminars to raise awareness of the role of the equality rep
- strategies to share good practice.

Training equality reps

To establish the current position with unions, their equality rep projects, equality reps and their training, the project began with an **initial survey** of 11 unions to find out the numbers of existing reps and whether they had been trained for their new role.

The unions surveyed were UCU, PCS, UNISON, Unite Amicus and TGWU sections, Prospect, NUJ, TSSA, NGSU, NASUWT and TUC Wales.

All these unions had elected lay reps who dealt with some aspect of equality – for example, women’s rep – but not necessarily a generic equality rep. The role and responsibilities of these reps varied considerably, partly because of lack of statutory rights, which meant they had developed on an ad hoc basis. Most of these reps had some sort of training in their role as a rep but had very little training in equality.

A **focus group** was held with union equality and training officers, TUC tutors and education officers and those running other equality rep projects to determine the content and length of the training course. The project then developed a nationally accredited **three day training course**, which was piloted in autumn 2008 by TUC Education in 12 courses throughout the regions. Two training courses in September 2008 and February 2009 were held for 21 TUC tutors to familiarise them with the materials and amend the accompanying tutor notes where necessary. Theresa Daly, TUC Equality Reps Project Coordinator, explains:

‘The training course focuses very much on the collective approach to equality and what is happening in the reps’ own workplaces. There is an outline of the discrimination law framework and the key legal concepts that

reps will need to know to be effective. A significant part of the course involves exercises which require equality reps to familiarise themselves with their union’s structures and to speak to other members of their branch. They are encouraged to study examples of their employer’s policies, to map their workplace from an equality perspective, to identify key issues, and to think about how they will effectively make the case for equality and to get others’ support for it.’

There was strong interest in the courses and 129 equality reps were trained in the pilots. The course evaluations from delegates have been very positive and, following these initial pilots and feedback from the tutors, extra activities were added and the final version was printed in January 2009. Numerous courses were scheduled throughout the regions through 2009 and the training is now embedded in the TUC Education programme. In addition, other officer and rep training courses have been amended to make reference to the role of equality representatives.

The TUC equality rep course is also available for delivery within unions and can be tailored to their needs. For example, courses have been run for PCS and GMB and, in January, it was delivered on a residential basis for the Chartered Society of Physiotherapists.

The TUC commissioned a consultant to convert the training materials into an **online** format and the course was advertised in December 2008. There were 155 expressions of interest, translating into two online courses, each with 58 students, starting at the beginning of March 2009 and finishing at the end of May 2009.

Promoting the role of equality rep

Although all unions deal with equality issues, not all have developed a representative with that specific role, and where they have, the role can vary.

This is partly explained by differing union structures and collective bargaining arrangements. For the equality rep to be effective in the workplace, however, the role and training needs to be promoted within unions and union officers need to be aware of the developments in equality and the content of the training courses.

The project therefore ran **eight regional seminars** to raise awareness of equality reps and the new Equality Bill. These were well attended, with 207 union officers from 28 unions. There was a mix of very small unions, such as NACO (National Society of Co-operative Managers) and URTU (United Road Transport Union) and large unions, such as Unite and Unison. Seminars were held in Birmingham, London, Glasgow, Liverpool, Newcastle, Newport, Leeds and Nottingham. Officers from CSP, FBU and ATL also expressed an interest in developing the role of equality rep within their unions.

Sharing good practice

In UMF Round 2 there were eventually eight projects approved which were concerned with the training and development of equality reps. In order to share good practice and provide a forum to discuss ideas, the TUC project set up an **equality project group**. The group had two meetings and created a network between the project co-ordinators of the eight projects concerned with training and developing equality reps. Says Theresa Daly:

'These meetings enabled us to share ideas, keep up to date with developments in particular unions, comment on policies and training materials and invite each other to equality rep events. In some unions the role of the equality rep will be largely a campaigning, support or championing role, whereas others intend equality reps to be full members of the negotiating team. The TUC is aware that in campaigning for statutory rights for equality reps we will

need to have a clear definition of the basic role and duties to write into the law.'

As a result of the equality rep group, the TUC project co-ordinator was co-opted onto the Unite team, reviewing their equality rep materials and co-tutoring their tutor training.

The TUC organised a **conference** in February 2009 to showcase the work of the project. Harriet Harman, Minister for Women and Equalities, was the keynote speaker and announced extra money for the work of equality reps. Other speakers included Brendan Barber, who reaffirmed the TUC's commitment to the development of equality reps and the campaign for statutory rights to enable them to be effective in the workplace. Examples of the work of equality rep projects in the public and private sector were illustrated by speakers from the Unison and Unite projects. Four equality reps from different regions, sectors and unions spoke about their achievements in their workplaces. TUC equality policy officers ran six well-attended workshops in the afternoon to update equality reps and union officers. Topics of the workshops were the new equality bill, disability, age discrimination, lesbian, gay, transgender and bisexual issues, black and minority ethnic workers' issues and women's issues in the workplace. The oversubscribed conference was attended by 160 delegates. All participants received a copy of the TUC project's training materials and a brochure summarising the aims and work of all the seven UMF equality rep projects.

Monitoring and evaluation

The work of the project was overseen by a steering committee that met quarterly. Members of the steering committee included BERR and a nominee from each of the TUC's four equality committees.

The project employed an independent, external consultant to evaluate the training and the impact equality reps were making.

Due to the short timescale, the evaluation (in January and February 2009) could only study the 97 reps trained between September and December 2008. This meant that some reps would have only been trained for six weeks, so their ability to have effected change in the workplace already would be limited.

The overall aim of the research was to evaluate the impact of the equality reps project. Key points that came from the evaluation were:

- The research programme used a range of qualitative and quantitative methods and benefited from a high response rate
- Equality reps are a mixture of new union activists, current reps adding to their role, and former reps continuing their union engagement
- The reps valued the opportunity to work with union colleagues and to clarify the role of the equality rep
- The courses led to clear action plans being drawn up by participants, based on contact they aimed to have with members, management and union colleagues
- A high proportion of participants reported that they had carried out some activities since the course and more planned to do so over the coming months
- Significant successes, often as a result of discussions with management, were reported in the follow-up survey
- The reps had overwhelmingly positive views of the role of the equality rep and freely gave their views.

Sustainability

The equality rep training materials have been published and distributed widely within unions and the other equality rep projects. This enables unions to use part or all of the TUC materials in their own training programmes, which will continue beyond the life of the TUC project. Unite, Unison and the Chartered Society of Physiotherapists (CSP) are using some of the TUC activities and resources in their equality training programme.

The three day equality rep course is now part of TUC Education's core short course programme and numerous courses have been advertised throughout the regions in 2009. The course is a standalone module, but can be used as part of other longer courses, and will form part of a proposed equality pathway in the Trade Unions Today section of the Qualifications and Curriculum Framework (QCF). This is the national accrediting body for TUC Education. The online course is also part of TUC Education's core online courses, and a new online course started in May 2009 with 20 students:

'The online course provides flexible delivery and potentially easier access to training for certain sectors of workers, for example disabled and shift workers.'

The course and the tutor notes are on the TUC tutors' website, and so available nationally to all tutors for use in developing TUC or bespoke union courses on equality.

The UMF project group, set up by the TUC, is continuing to meet to share good practice for the life of the UMF projects.

Lessons learned

The project had underestimated the numbers of reps who would be interested in attending courses and the level of interest from union officers in the regions. This was because, traditionally, equality training courses advertised for reps do not recruit well and often have to be cancelled. The lack of a statutory right to training in this area is a partial explanation.

Certain elements of the project worked particularly well:

- The baseline survey and the focus group enabled the materials to reflect the needs of unions, their membership and the workforce
- The UMF project group was a focus for ideas; and provided the opportunity to share good practice, help and support, and avoid 'reinventing the wheel'
- The regional briefings, organised by TUC Regional Education Officers, on equality reps' training and the new equality bill gave valuable insight into regional differences and needs in equality
- The steering committee provided the discipline of written quarterly reports and accountability for the project to a wide audience
- The tutor feedback on the pilot materials enabled the final materials to be more effective
- The external evaluation provided valuable information on the nature and work of equality reps.

Other areas have been identified requiring further work.

Looking ahead

The TUC is therefore planning:

- **A campaign for statutory rights for equality reps** – The external evaluation found that 'a number of reps drew attention to the lack of statutory recognition of the equality rep and the importance of them getting this recognition to give them the standing and facilities time to effectively fulfil the role'. This is a recommendation for the TUC and unions and is outside the scope of the UMF
- **Workplace case studies** with the employer and equality rep in different unions, sectors and regions – to illustrate the work the reps are doing in their workplace
- **Work on a generic role description** for equality reps by TUC and affiliate unions
- **Collating and publicising** some of the outstanding activities of the other equality reps projects, which are due to complete in 2009 and 2010
- **An extension of the project** for nine months, funded by the Government Equalities Office, which will enable the TUC to:
 - evaluate the online course, which provides a flexible mode of delivery and an improved access to training for disabled people and shift workers, for example
 - extend the scope of the initial evaluation to cover those reps trained from January 2009 until the end of the project
 - develop additional training materials and resources to provide progression and to support the role
 - co-ordinate, share good practice and highlight the effect that the other eight projects are making in the workplace.

Conclusion

The project has been very successful and met the objectives in the original bid, as Theresa Daly sums up:

'A total of 165 reps attending over two terms with employer release is excellent. The training has clearly met a need. At the Midland briefing for union officers, one officer stated that 70% of his work was related to equalities. The changing and complex nature of the legislation means that reps and officers often lack the time to keep up to date. They have welcomed high quality, well resourced, accredited training in this area. There is private and public employer support for this initiative. It is demonstrated by the release of reps for the training, and that the Welsh Assembly, Principality Building Society (Wales), Nationwide Building Society and Virgin Atlantic Airways have granted paid facility time for equality reps. The most significant outcomes for the project are the difference that trained equality reps may make in the workplace. The independent evaluation of the project asked equality reps to report any change that could be counted as a success, however minor, since completing the course. The evaluation report findings showed that most reps were able to report some success in the weeks since finishing their course, predominantly in improving contact with management and in raising awareness. Because of the success of the project, the Government Equalities Office has funded (on a matched funding basis) a nine month extension for the project to evaluate in more detail the impact equality reps are making. The model of the TUC organising and co-ordinating a project group of the other UMF projects was cited as good practice by BERR, and will form part of the TUC's bid to the UMF Round 3 on vulnerable workers.'

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