

**BIS** | Department for Business  
Innovation & Skills

**UNION MODERNISATION FUND**

Amicus – Amicus Workplace Equality  
Reps Development Project

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# Unite the Union - Union Equality Reps Project

## Introduction

Unite the Union was formed in May 2007 as a result of the merger between Amicus and the TGWU, to form a union with nearly 2 million members. The Amicus section of Unite alone has over 1.2 million members, 21,000 workplace reps and more than 250 disability champions. The Unite rule book contains new rights of participation within the union's structures for union equality reps, which needed to be implemented as part of TGWU's integration. The plan was to use the two-year transition period between the two organisations to bring Amicus up to speed with the TGWU's network of equality reps. Amicus also wanted to provide support and information to the Joint Executive Council as to how the role of equality rep should function within the new union.

## Why this project?

Unite had a lower representation of workplace reps from its black and minority ethnic (BME), disabled, young and lesbian, gay, bisexual and transgender (LGBT) members. The number of women workplace reps reflected their percentage of women members (34%), although occupational segregation meant that women workplace reps are concentrated largely in the finance and public sector. Siobhan Edean, Project Manager, explains:

*'It is vital that we increase the diversity of our membership to reflect the changing demographics of the workforce, which are projected to see an increase in women and ethnic minority*

*workers in relation to white men. Equality reps would aid the transformation of our membership by appealing to a wider range of members to become active in the union. This is the experience of union learning reps where there is a greater percentage of women and young members in relation to workplace reps. The equality reps would make contact with members who experience discrimination and appeal to them to become part of the union's equality networks, to find out about the union's campaigns on equality, and to join with other members in becoming equality reps themselves. Additionally, equality reps would help publicise the union's work on equality in their workplace, which would encourage more people to join the union. Prior to this project, there were some workplace reps who were responsible for equality issues and also 250 disability champions. In the main, they were working very hard within their companies to deliver on equality issues for union members. What they needed was the ability to participate within the union and their workplaces as part of the mainstream Unite structures, and the training and recognition for the vital work they were carrying out. Unite identified the importance of modernising our structures to ensure we facilitated the full implementation of union equality reps within the workplace, administrative and democratic structures of Unite.'*

Unite recognised that equality issues have risen up the collective bargaining agenda in the workplace due to new equal rights legislation - sexual orientation regulations, age discrimination regulations, the disability discrimination act, new rights to maternity and paternity leave, rights to

request flexible working hours, the race relations amendment act, public sector duties to promote equality and the right to accompaniment for members with grievances. Union equality reps will not only deal with these issues but also play an important role in issues such as equal pay, bullying and harassment and discrimination in the workplace. Siobhan emphasises:

*‘Action requires to be taken in the workplace to change policies and practices such as closing the gender pay gap, promote work-life balance and improve the position of BME and disabled people in the labour market.’*

Recognition by employers as workplace reps has also been identified as a key development issue with disability champions. Unless they are already a workplace rep most are not formally recognised as an equality rep by their organisation and are not given paid time off for training or to carry out their role. Siobhan explains:

*‘This has the potential to reduce their effectiveness on improving disability access and equality within their organisation. Equality reps will also need to ensure that they form a part of their organisations’ union reps’ committees and structures. One of the equality reps’ key transformational challenges will be to negotiate new recognition agreements with employers which ensure that equality reps are recognised within their organisation and that they will be entitled to facility time to carry out their role effectively.’*

This project, supported by the Union Modernisation Fund (UMF) therefore aimed to:

- facilitate the development of 400 members of the union as new union equality reps

- provide a strong network of these reps
- ensure they have access to training
- gain recognition from their employer and the union
- develop communication tools for union modernisation in this field.

## Methodology and outcomes

The project set out to:

- make any necessary adjustments to the union’s admin systems to facilitate equality reps
- cascade awareness of the role of equality rep throughout the union’s staff and officers
- develop training methodology and materials for equality reps
- facilitate online networking.

The union seconded three project workers to work for two years on appealing to a wider diversity of members, encouraging involvement from disabled, BME, LGBT, young and women members, as well as existing workplace reps on equality issues. The project manager had overall responsibility for the management and administration of the project, including the line management of the three project workers, attendance at all the steering group meetings, financial management, monitoring and evaluation.

The three project workers took responsibility for three pilot regions and three industrial sectors in the promotion and development of equality reps. It involved them giving presentations on equality reps to union rep meetings, including regional councils, workplace committees and area activist meetings. Taking responsibility for the key objectives, the project workers worked with national officers, regional secretaries, national sector committees and workplace reps to disseminate the

project. They also supported workplace reps in meetings with employers about the development of equality reps in their organisation and provided ongoing support to the equality reps themselves.

Within its second year, the project added a focus of recruiting and organising union equality reps within the public sector, which enabled the project to meet its target of organising 400 union equality reps.

### **Project elements**

The project consisted of five distinct elements:

#### **1. Making adjustments to the union's administration to ensure the role of equality rep is understood by the union's officers and staff and accommodated within the regional and industrial democratic structures of the union**

The next stage of integration between the unions was to develop the rule book which recognised equality rep as a key role within the organisation. Siobhan adds:

*'The transformational challenge for the union was to ensure that equality reps are recognised by the union and able to participate in those elections. There were already some Unite equality reps in workplaces where Unite was recognised by employers. The admin systems needed to identify and accredit these equality reps and update the information in our membership system, education department, conference department, publications department and regions and industrial sectors, which all have databases that record Unite reps. Data needed to include what training these Unite equality reps had had, committees and conferences they had attended and been elected to, and their branch. Officers and staff of the union needed to be aware of the role of*

*these equality reps so that these reps could be invited to (and attend) the union's meetings and be entitled to access the information, services and support structures that the union provides to its workplace reps.'*

As a result of this element:

- The new rule book has been implemented through the election of new regional, industrial and equality structures of the union. Throughout the discussions about the implementation of the rule book, the project was able to ensure that union equality reps could participate in those elections and become elected to serve on the union's committees.
- All officers and staff have received a cascade briefing on the accreditation processes for union equality reps.
- Union equality reps have been set up as a field on the membership system and the regional administrators have been briefed on how this operates, cascading this information to all regional officers and staff.
- Best practice guidance has been developed for regional officers in negotiating for union equality reps. This guidance has been disseminated and is available on the union's intranet.
- All the information relating to the union's admin procedures for union equality reps is available on the union's intranet and is mainstreamed within the union's training procedures for staff and officers.

**2. Developing new methods of engaging members who experience discrimination, as well as members interested in union activity in the role of equality rep, resulting in networks of equality reps in pilot regions and industrial sectors**

**Principality Building Society**

Anne Cockram, Unite’s elected equality rep, is delighted by the progress:

*‘This is a step forward for the equality agenda in the Principality and I am keen to explore the options for bringing greater diversity into the workplace and to strengthen flexible working opportunities to all grades in the Society.’*

Nick Taylor, Head of HR at the Principality, is equally keen to make things happen:

*‘The Society takes a positive stance on equality issues and by setting ourselves achievable goals and a clear plan of action we are all looking to make this a success in the long as well as short term.’*

The project has developed online interactive networking for equality reps, a new development for the union’s website.

As a result of this element:

- A wider range of members has become active in the union and the equality reps’ publicity of the union’s work on equality in their workplace is encouraging more people to join the union.
- A Unite the Union general equality members’ network has been set up to complement the existing networks – BME, disability, LGBT, women and

young members. These networks are signposted to the Unite the Union website, which gives information on the project.

- The union equality reps’ message board has been set up on the website.
- The union equality reps’ web pages are available on the new Unite website and work is continuing to develop the format and content of these pages.
- A union equality reps’ project Facebook group has been set up to communicate about the project and the development of equality reps.
- A leaflet, posters and a questionnaire have been produced to support the communication of the project and the development of reps. These have been widely disseminated throughout the union. A flyer was produced for the conference for delegates interested in taking on the role of union equality rep.
- The union equality reps’ card and badge have been designed. The badges have been produced and are available for distribution on the election and training of the reps.

**3. Engaging with employers to build best practice in facilitating the role of the equality rep in the workplace**

Target companies and organisations for the organising campaign for union equality reps were agreed with senior industrial officers. The project development officers briefed the relevant union committees on the project and visited a large number of companies to negotiate recognition for union equality reps.

Seven events were held in London, Manchester and Leeds in May 2008 to publicise and inform members and reps about the project. There was a high level of interest, with 286 people signing up to become equality reps in their workplaces.

As a result of this element:

- A wide level of support has been shown among existing workplace reps and employers for the development of equality reps to support specialisation in equality fields, such as race equality schemes in the public sector.
- Equality reps are able to engage with employers, ensuring that equality is central to their bargaining agenda in their workplace.
- Members who experience discrimination are becoming union equality reps themselves, bringing a wider understanding of workplace issues to the Unite team of workplace reps.
- Union equality reps now form a part of their organisations' union reps' committees and structures. Says Siobhan, *'We have negotiated new recognition agreements with employers which ensure that equality reps are recognised within their organisation and that they will be entitled to facility time to carry out their role effectively.'*
- A database has been compiled of union reps and members who have expressed an interest in becoming a union equality rep, which now totals nearly 700.
- Since expressing an interest, 400 of these members have become a new accredited equality rep or a workplace rep with responsibility for equality, at least 120 have been trained in

the role, and a programme for training has been mainstreamed within the union's education programme.

#### 4. Developing educational tools and programmes for equality reps

Previous courses and training materials developed by the T&G section and the Amicus section of Unite informed the development of the educational materials for training for equality reps in the union.

As a result of this element:

- A five-day training course was developed and now forms an integral part of the Unite the Union main education programme, available regionally and nationally for all union equality reps to attend. The course includes modules on gender, age, disability, BME, sexual orientation, gender identity, the public sector duties, dignity at work and work-life balance. Equality reps also get up to speed on legislation, best practice, negotiation with employers and advice to members in these areas before they are accredited as equality representatives.
- The training has been publicised widely by email, via the e-equality newsletter, through the equality and education departments' WebPages and networks and at the Unite regional equality conferences.
- Accreditation has been achieved for the five-day course that was delivered at the successful pilot in July 2009 in Durham.

Accreditation has been awarded through Passport to Progress, the recognised structure for accreditation of trade union education. The course has been accredited at level 2, consistent with all other Unite the Union courses. It is available locally and nationally through the union's education department and is delivered either as a five-day residential course or as five weekly one-day or evening courses.

- A pilot of the public sector equality duties training has been held in the regions for public sector reps during January and February 2010. These seminars have been arranged in conjunction with the Union's education department and the public services sector. Over 100 union equality reps attended the public sector seminars.

Courses were very well received.

Delegates wrote in the end-of-course evaluations, for example:

*'I've gained a more in-depth view on equality issues - it has contributed to an ability to identify new issues on problems that did not seem to be serious beforehand.'* *['The course gave me] the confidence to challenge unacceptable behaviours.'* *['My priority now is] going back to the workplace and community and making a difference.'*

### **5. Disseminating the model of equality rep throughout the union and the trade union movement**

The final stage of the equality reps project was to raise awareness of the new role of equality rep within the union, *'to demonstrate that the union has progressed the policy, rule and administration of equality reps, both*

*within the union and to the wider trade union movement. This will ensure that the role of equality rep is transformed from a policy and rule to custom and practice within the union'.*

#### **Royal Mail**

Jimmy Grime, Senior Unite Rep says: *'I feel that union equality reps have a massive part to play as catalysts in moving the culture to one of inclusion and equality, and that feels right for all of us to work and prosper in. Union reps have shown their valuable contribution in the health and safety field and are now indispensable at work. All parties agree that everybody benefits from their work and I am sure that this will be the same when union equality reps become established throughout Unite. I am really looking forward to making a difference and changing the culture to one that we can all enjoy together in harmony.'*

As a result of this element:

- A conference of 363 delegates was held in October 2008 at the Institute of Education in London, which launched the union equality reps' education programme and online networking facility. Siobhan Endean also spoke about the project at the TUC union equality reps' conference in March 2009. Fringe meetings on the project were held at the TUC young members', women's, black workers', disability and the LGBT conferences.
- The union equality reps' negotiators' guide, a tool that union reps can use to support the development and

recognition of union equality reps, was launched at the pilot of the training course in Durham and online via the e-newsletter in July 2009. All delegates to the Unite regional equality conferences in October 2009 also received a copy of the guide. It gives advice to union reps on:

- the election, accreditation and recognition of union equality reps
  - the role of union equality reps
  - support and resources for union equality reps
  - the union's equality networks and structures.
- Project development officers attended regional equality conferences in October 2009 to brief delegates on the project, training programme and resources and to encourage reps to consider putting themselves forward for election as union equality reps.
  - Project development officers organised a stall at the national industrial sector conferences in November 2009 and spoke at many of the conferences to brief delegates on the project, training programme and resources, and to encourage reps to consider putting themselves forward for election as union equality reps.
  - The final event for the project took place in February 2010 in the Atrium in Westminster. The event was addressed by Harriet Harman MP, Anne Simpson from BIS, Siobhan Endean from Unite and Derek Simpson, General Secretary of Unite. The event was attended by over 100 Unite union equality reps.
  - A research report examining the best methods for trade unions to promote and negotiate on equalities issues at work was also launched at the project's final event. The research reviews the structures, mechanisms and methods by which equality issues can be promoted and negotiated in workplaces. This review includes both potential innovations and existing good practice on equality and diversity which have been initiated by other trade unions and trade union organisations in the UK and elsewhere in the EU.
  - Unite continues to disseminate the project throughout its structures and has disseminated the evaluation report to the union's regions, and other unions through the regional TUC.
  - Unite has engaged internationally with the European Metal Workers' Federation and the NORMA project in Italy to disseminate the role of union equality reps with sister unions across Europe.

## Lessons learned

- **Realistic objectives** - The application in support of the project was written by the project manager, this was important in ensuring that the project set out realistic objectives which were then achievable within the limitations of the project's resources.
- **Focused staff** - The key to the delivery of this project has been *'a dedicated and well-supported project team consisting of the project manager, three project workers and a project administrator. It is clear that the*



*project management skills of team members, a dedication to detail and a commitment to the project have all been central to the project's success'.*

- **Top led** - A key theme throughout the project has been to mainstream the role of union equality rep across the union's structures. The support and guidance of Unite Assistant General Secretary, Les Bayliss, has been essential to this. *'Les provided senior management team involvement and made sure that the project was supported on a day-to-day basis by ensuring the project team were aware of the opportunities available to influence the development and integration of the union's administrative and democratic functions, and crucially, ensured the project team were involved in the decision-making process.'*
- **Attention to detail** – *'The UMF board requested that we amend the application to reduce the personnel costs of the project and also provide a better explanation of the size of the impact of the project. This resulted in a detailed analysis of the reasonable expectations that could be placed on a project team working over a period of two years which assisted in ensuring effective project team management.'*
- **Integrating finance and budget management** - Financial management of the project has been successful due to *'the integrated finance and budget management, which has been recorded within the union's main finance systems. This was assisted by ensuring that the system adjustments were made prior to the start of the project*
- and that relevant budget allocations within the project were given dedicated budget codes'.*
- **Effective project management** - The project manager reported to the General Secretary of the union on the progress of the project and prepared bi-monthly written reports for the National Executive Committee of the union. *'This has led to ongoing evaluation and effective dissemination of the project across the union's democratic structures.'* Quarterly written reports were provided to the UMF and Anne Simpson, UMF monitoring officer, attended the steering committee meetings. In addition, *'the steering groups met on a six monthly basis and were responsible for driving the achievement of the project objectives, providing information and key experience to the process, monitoring the effectiveness of the project and advising on adjustments to the project where necessary.'*
- **Focusing on objectives** - Regular reporting to the UMF board and internally within the steering groups that provided the overview for the project ensured that the union *'kept a vigilant eye on the project objectives throughout, and that there was minimal project drift by assessing the achievement of the project objectives through the detailed SMART objectives list'.*
- **Positive working relationships** – *'It has been essential to maintain constructive and positive working relationships with key decision makers throughout the union.'*

- **Record keeping** - Due to personnel changes throughout the project, it was essential to develop efficient record keeping to ensure that communication was effective and transparent. This assisted immensely when it came to the evaluation of the project.
- **Allaying employers' fears** - One concern was that there would be resistance from employers to allowing day release for union equality reps for training. *'This has had some impact, as it has been the case that union equality reps have taken unpaid leave to carry out training for their role. The union provides an education grant in this instance and that has had some impact. The priority remains to negotiate with employers the importance of providing paid release for training for all union equality reps.'*
- **Providing support in an economic downturn** - A concern was that a large-scale industrial relations issue could slow down or even suspend the work on developing union equality reps. *'It became clear during the lifetime of the project that the economic slow down and resulting period of recession meant that many companies were making large-scale redundancies within manufacturing and the finance sector. The harsh impact was that many union equality reps were losing their jobs and were unable to continue the role of union equality rep. Unite has stayed in contact with those people, some of whom have now found new employment, and has*

*provided as much support as possible.'*

## Looking ahead

- An online version of the five-day course is being developed, along with additional training modules on the different strands of equality, dignity at work and the public sector equality duties. It is hoped these will be available for Union Equality Representatives to undertake in 2010.
- The role of Union Equality Representative is now successfully embedded within the union's structures, and the completion of the project has meant that the union will continue to support the role within the day to day management of the union.

## Conclusions

The project has been a great success and achieved its aims and objectives, ensuring that the union has adapted to facilitate union equality reps and developed tools for union modernisation in this field. Says Siobhan:

*'This has been due not just to the hard work of the project team, but also to the effective management of the project. The project was designed to mainstream the role of union equality rep within the union structures. This would not have been possible without the support and cooperation of all the internal departments of the union and the supporting leadership of the Union's senior management team. The support that was provided by the Union Modernisation Fund team at the earliest stages of drafting the project bid was invaluable in determining the project's*

*SMART objectives, the time line for the project, and the allocation of the project's financial resources to achieve the best return on the investment.'*

Siobhan sums up:

*'Specifically, the project has meant we've been able to make adjustments to the union's administration to ensure the role of equality rep is understood by the union's officers and staff and accommodated within the regional and industrial democratic structures of the union. We've developed new methods of engaging members who experience discrimination, as well as members interested in union activity in the role of equality rep, resulting in networks of equality reps in pilot regions and industrial sectors. We've engaged with employers to build best practice in facilitating the role of the equality rep in the workplace. We've developed educational tools and programmes for equality reps. And we've disseminated the model of equality rep throughout the union and the trade union movement. Unite members who have been elected as union equality reps feel well supported and resourced by the union and find the role to be a rewarding experience where they are able to help many union members with equality issues in the workplace. This project would not have been possible without the support of the UMF and the General Secretaries of Unite would like to place on record their gratitude to the board of the UMF for their continued support for this project.'*

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