



**UNION MODERNISATION FUND –
ROUND 2**

EQUITY : get in on the act

**Case Study written by : York
Consulting LLP**

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Evaluation of the Engagement Programme

This report provides an evaluation of
Equity's use of the Union Modernisation
Fund, Round Two

by York Consulting LLP

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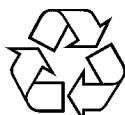
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EXECUTIVE SUMMARY

Equity operates across a wide range of professions drawn from the entertainment, creative and cultural industries. This presents particular challenges for the union with regards to developing and maintaining working relations with its members, particularly with a large proportion of the workforce working as freelance or contract workers.

The Union Modernising Fund, launched in 2007, has been a catalyst in enabling Equity to extend its influence across various sectors. Equity has used the fund to review and modernise its election systems and to build capacity among union activists as well as increase membership.

The funding has also enabled Equity to raise awareness among non members and student members of the support available across the sectors. Equity utilised the UMF successfully to develop four key strands of activity:

- **Audiovisual Tool** – a DVD has been created and widely distributed to inform members and non-members of the importance of supporting their union, striking a good balance between comedy value and information on how to engage with the union;
- **Voting Methods** – by improving and modernising Equity's voting methods, there has been an increase in voting numbers and an increase in the contestability of Equity Council seats;
- **Representing the Voice of Students** – students have been prioritised and information relating to their representational needs has been generated by online surveys and focus groups. Student members have recognised the investment and student membership has increased;
- **Equality Training** – Equity has developed capacity among its members to support the equalities agenda through the training of a significant number of equality representatives.

The funding has underpinned Equity's commitment to the engagement agenda and has been a catalyst for change, particularly in its democratic processes.

Going forward, it is important that Equity builds on this momentum, by utilising the information generated to inform priorities, and by ensuring that the equalities expertise developed is appropriately supported in order that newly trained representatives become, and remain, active.

1 INTRODUCTION

Background

- 1.1 York Consulting LLP (YCL) was commissioned by the trade union Equity to evaluate their Engagement Programme, which is funded by the Union Modernisation Fund (UMF). The Engagement Programme has sought to increase members' participation in the union and increase activism.
- 1.2 York Consulting is a well-established social and economic research company with 15 years' experience in undertaking research and evaluation of and for the union movement. Over the years, we have evaluated the impact of the Union Learning Fund for the government and carried out significant evaluations of the establishment and development of Unionlearn for the Trades Union Congress (TUC).

Equity – The Union

- 1.3 Equity represents workers from a disparate range of industries drawn from across the creative and cultural sectors. The industry is characterised by self employment, contract and part-time working. As a consequence, Equity represents many workers who are transient in terms of working patterns and are more vulnerable to changes in employment conditions or economic downturns. Equity, therefore, plays a crucial role with regards maximising employment opportunities in the sector through a range of capacity building strategies and providing a potentially vulnerable workforce with advice and information on a range of employment issues.
- 1.4 Equity campaigns continually to raise its profile in the industry and to ensure that it represents its members as fully as possible. The Equity General Secretary was elected on to the TUC's General Council in 2008, which, for a small union of fewer than 100,000 members is a significant achievement.

The Union Modernisation Fund

- 1.5 In order to further improve the support and influence of Equity, the union has received funding through the UMF to investigate and trial ways of empowering and engaging its members more fully in the work of the union.

1.6 The UMF is a Government grant scheme providing financial assistance to independent trade unions and their federations. The purpose of the funding is to enhance trade union structures through modernising and transforming organisational practices that will ensure unions continue to contribute to constructive employment relations and the economy as a whole.¹

Focus of the Evaluation

1.7 Equity has used the UMF to develop and improve its support and communication to members and potential members and to ensure that its democratic processes engage as many members as possible. In particular they have focused on four key areas of activity:

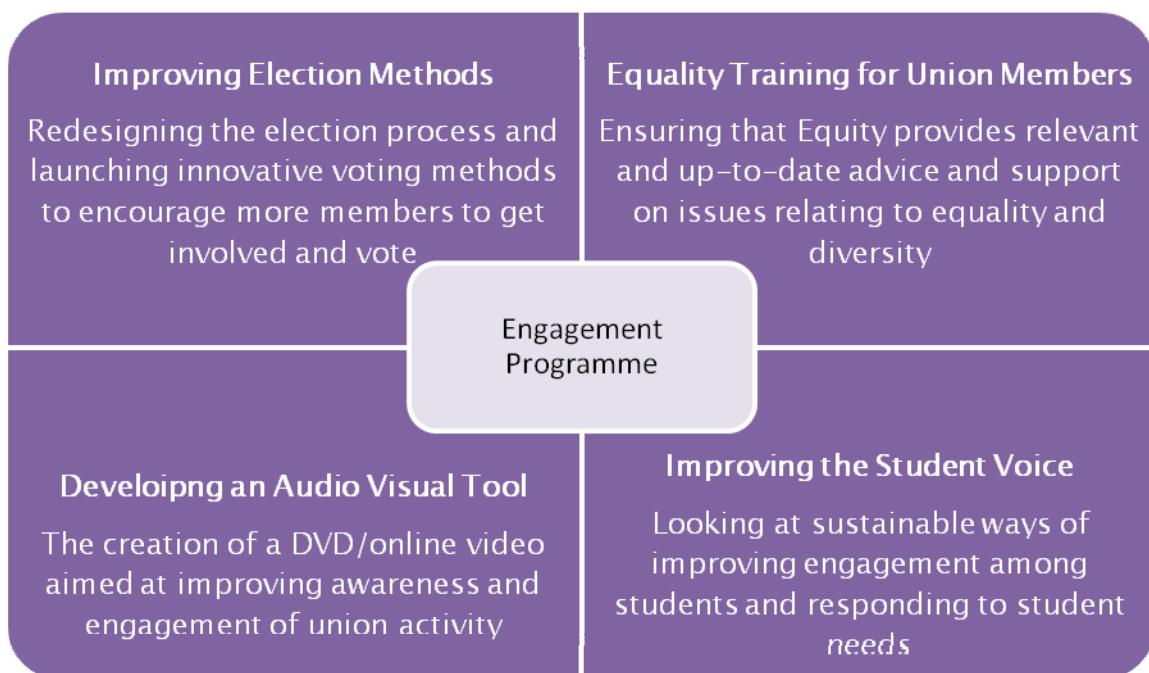


Figure 1

1.8 The purpose of the evaluation was to draw on evidence generated by Equity to report on the degree to which the four strands of the Engagement Programme were implemented and have led to any impacts to date. Evidence has been generated through surveys, focus groups and online forums to investigate the impact of the four strands of activity.

1.9 The report is structured as follows:

- Section 2 details of the aims, activities and effectiveness of each strand of the Engagement Programme;
- Section 3 provides conclusions.

¹ www.bis.gov.uk

2 DEVELOPMENT ACTIVITIES

- 2.1 In this section we describe the capacity building activities funded through the UMF and provide evidence of impact where available.

Strand 1: Audio/Visual Tool Development

Aims

- 2.2 A DVD was developed to provide information regarding the benefits of the union and also how to become involved in union activity. The aim was to appeal both to members and potential new members to demonstrate the value of the union, both to individuals and in improving employment conditions in the performing arts and creative sectors.

Content

- 2.3 The DVD has relevance and comedy value by the fact that Jo Brand, the comedian, was engaged and delivered a stand-up performance to a live audience with a number of Equity jokes woven in. The Gagging for Equity DVD is a powerful piece of film that promotes, in a light-hearted way, the benefits of union engagement. Jo Brand spent time as an active Equity Council member and was an ideal person to promote the membership: leading by example.
- 2.4 The DVD clearly demonstrated her alliance with the union and sent a strong message that union membership is valuable:

"I think you do feel that you have achieved something by working for an organisation like Equity because you have moved things forward and [you are] not only improving things for yourself but for other people as well". (Jo Brand)

- 2.5 The stand-up performance is followed by a question and answer session with Jo Brand and Equity. This sets out clear guidance in terms of how the union operates, the structures of unions, and how people can become involved. It is very encouraging of new members:

"There's nothing to be nervous about...you can really achieve by being a member". (Equity)

- 2.6 In our opinion it has achieved a good balance between giving information and providing a piece of media that people will be interested to watch.

Distribution and Penetration

2.7 A total of 44,000 copies of the DVD were made. It was sent to new and existing members and a range of stakeholders². Furthermore, the documentary was also made available through:

- copies of the Equity magazine, in winter 2008;
- showings at all Equity workshops and branches;
- showings at industry events and festivals;
- dance and drama schools events; and
- YouTube³.

Effectiveness

2.8 The DVD has achieved tremendous reach having been made available through a wide number of distribution channels. This multi-faceted approach to distributing the DVD has given many current and potential members the opportunity to view it and learn more about the work of the union.

2.9 The involvement of a high-profile stand-up comedienne on the DVD has helped to raise interest in Equity and, simultaneously, in Equity membership. Individuals have been encouraged to watch the DVD because of Jo Brand's appearance in it and her support for Equity membership is likely to have encouraged them to join.

2.10 Comments on the Equity forum regarding the DVD included the following:

"I think it's good that Jo Brand has given permission for her work to be on the Equity website and by that I would imagine she's very supportive of Equity and is an Equity member."

"The Jo Brand DVD is pretty neat too, much more than what we have seen on the homepage here. Not bad for free!...it's good advertising for the Union."

(Source: Equity Online Forum)

² Stakeholders included drama and dance schools; MPs and other trade unions.

³ As at end July 2010 the online documentary had received 1,800 hits.

Strand 2: Improving Election Methods

Aims

2.11 Equity wanted to drive up the level of engagement among members in elections for seats on the Equity Council, the governing body of the union. This was to ensure that the best candidates hold seats and to reduce the number of uncontested elections. This focus of activity has been to modernise and simplify voting methods for committee members and union officials, thereby increasing participation in elections. By updating the means through which members could make nominations and vote, Equity hoped to rekindle participation and interest in elections, increasing the number of seats being contested and voter turnout.

Activity Details

2.12 Equity undertook a consultation process with members to discuss their preferred methods of voting to encourage increased participation from members. As a result of this, an online voting process has been developed so that members can be nominated more easily, as distance can often be a barrier to seeking election due to the geographically dispersed nature of members.

2.13 An online nomination process has been created within the members' area of the website. To ease the initial process of elections to seats, the 2009 Committee Elections agreed that members would be able to nominate themselves (but must be seconded by a fellow member). The voting papers have been redesigned to make them more engaging for members: an update that had not been undertaken for many years.

- Nomination documents for Council and President elections in 2008 were re-designed and sent to all members along with the Equity magazine.
- The design of paper nomination forms and voting packs have been improved: for example photographs of nominees were included for the first time alongside short biographies of the candidates.
- Ballot papers were also re-designed along with new election branding.

2.14 The Equity magazine included information on the work that various committees undertake to promote awareness and stressing the importance of elections. Members were encouraged to participate in the elections through email reminders and articles on the Equity website.

2.15 Thereafter, for the 2010 Council Elections, a ‘Use Your Vote’ campaign was launched. It included innovations such as the use of social media websites to raise awareness among members of the elections process. Facebook, Twitter, email and printed posters were used to inform members about the upcoming elections and to encourage deputies and ambassadors to talk about them in workplaces. Posters were placed in workplaces, distributed amongst candidates and were sent to over 400 theatres for attaching on notice boards.

Impact on Elections

2.16 Every two years, Equity members elect the Equity Council. The results of these elections show a bi-annual increase in people becoming involved in the elections, both in terms of numbers voting and in the number of seats being contested:

The 2008 Council and President elections saw more members voting compared with 2007 (2,586 to 3,307) and 10% of those eligible to vote did so.
Of the 47 elected seats, 13 (28%) were new councillors. Nevertheless, 13 of the Councillors were elected unopposed.

The 2009 Committee elections actually saw a slight reduction in the proportion of members voting: down to 9%. Around 10% of the members who did vote made use of the online voting option. There was an increase in the number of contested committees, from 8 in 2007 to 11 in 2009. In particular, all four equalities committees were contested compared to only one in 2007.

The 2010 Council Elections increased the number of nominations and voter turnout increased by one-third since 2008 (3,218 to 4,265) with 13 new councillors elected. A notable ‘first’ was an elected Equity Council with a majority of female representatives: a significant breakthrough for the equality of representation on council committees.

(Source: Equity 2010)

“For the first time in known history we have more nominations than there are places available.”

(Source: Equity)

2.17 The commitment that Equity has shown to increasing democratic representation is clear: aided by the UMF, it has quite dramatically improved the level of engagement among members in elections. With the modernisation of the process and the ongoing drive to increase participation, the results should continue to improve.

Strand 3: Developing the Student Voice

Aims

2.18 Equity has focused on developing greater awareness of their union among students planning on a career in the performing and creative arts. This is an area that has had limited investment to date and in which there is great potential to improve engagement in and support of Equity, as well as in the union movement more generally among younger people.

2.19 A key objective of this strand of activity was to improve channels of communication with students and to improve the degree to which the student voice was represented in Equity.

Activity Details

2.20 It was acknowledged by Equity that there was a lack of awareness of the demographics of their student members as well as what students wanted from a union and how they were perceived by students. To this aim, a number of activities have been undertaken:

- an online survey with student members were undertaken to find out the opinions of student and what information and support they required from the union;
- a professional workshop was held at The Savoy Theatre which gave opportunities for students to meet experts and receive advice and hints on developing/marketing themselves as a professional;
- inclusion of student voice in the Equity magazine.

The Survey

2.21 The questionnaire was structured to cover a range of areas:

- information about students, such as age, gender, disability;
- training: what form of training students were undertaking at the time of the survey and the discipline they were studying under;
- communication with students: reasons for joining Equity, what information they use and the usefulness of this information
- how active students were in the union at the time and what whether they would engage in further research/communication with Equity.

2.22 A total of 217 responses were received from a population of 3,900 (a response rate of 5.5%). This is somewhat disappointing given that the recipients were members. In our experience, a response rate of between 20 – 25% could have been achieved. However, a response of over 200 does provide a confidence interval of 6.5% on a confidence level of 95% which is a useful score and provides a good level of accuracy when interpreting the responses.

Headline Findings from the Survey

Those students who signed up to become Equity student members said that they had done so for the following reasons:

- to secure their professional name (82%);
- to gain professional recognition (80%);
- as an information source (72%).
- 92% (196 respondents) said that they planned to upgrade to full Equity membership on graduation;
- the magazine was the main Equity resource used by student members (79%), followed by the main website (48%);
- there were mixed messages on alternative communication channels preferred. Dedicated space in Equity magazine (65.7% very/quite helpful); an emailed newsletter (64.5% very/quite helpful) and a printed student newsletter (63% very/quite helpful) were the most prominent responses.

(Source: Equity Survey of Student Members 2009)

2.23 The survey has also elicited a wide range of suggestions regarding how the service and information from Equity can be improved:

There were comments on how Equity directly could help students: "It would be useful for Equity to come into drama schools to talk to students so we understand what they do".

How Equity support students who are moving out of student membership but not yet established as a professional was a concern among many students: "I am facing not being a student anymore...but haven't had professional jobs to allow me to become a fully paid member...the audition pages should be opened to student members".

Many students wanted help and advice on moving into the profession: "advice on copyright issues for work produced during courses" "advice on breaking into the industry", "How to leap from studying to entering the entertainment industry"

(Source: Equity Survey of Student Members 2009)

2.24 There is a rich source of information and concerns from students that could be further utilised. There was some indication from Equity that the survey has not been fully analysed due to a lack of time and/or resources. A valuable exercise would be to produce a short report on the survey findings and upload on the Equity website. This would demonstrate to students that their opinions have been listened to and are helping to shape action and support to students.

2.25 Having said that, Equity has developed further methods of engaging with students and finding out their support needs.

Professional Workshop

2.26 Equity held a professional workshop for students that offered them a chance to have a 'behind the scenes' look into the working of a West End theatre. Invited to the workshop was a list of acting and filming/production experts who offered advice and information about becoming a professional in the industry and developing a strong curriculum vitae. The workshop was facilitated by Equity, who led a plenary session where students could ask general advice and information questions. Feedback from students who attended the day found the experience very positive:

"I think that days like the one you organised last week are invaluable. If it wasn't for that day I would have felt quite scared to go into the Equity offices...meeting everyone and talking about Equity made me realise that they are there to help us."

"I found the day very useful – particularly the CV session and Q&A with Equity representatives. The master-class in the afternoon was valuable, seeing how the actor is a storyteller and how to present that story to an audience."

(Source: student email responses to Equity's call for feedback)

Student Feature in the Equity Magazine

2.27 A student feature was included in the Equity magazine for the first time ever. The article presented the views of five students at Drama Studio London, discussing what they wanted and expected from Union membership:

"Equity in the future would not be just a union in a traditional sense, but something that takes members under its wing and stimulates and develops them and that may not be what unions have done in the past." (Equity Magazine, Spring 2009)

2.28 Equity has worked in partnership with student magazines to improve the profile of the union among non-members as well as members. A dedicated column about Equity has been included in *The Drama Student Magazine* to help raise the profile of Equity and address some of the questions that students had about the union.

Impact of the Engagement with Students

2.29 The consultation process with students has proved extremely valuable. They have engaged with the union and provided feedback on the communication channels they would prefer and the content of information they would like to receive. The ultimate success of improved communication will be increased numbers of student members and a resulting increase in those who become full members upon graduation. These are medium-term goals; a very significant short-term impact should not necessarily be expected.

2.30 The last three years have seen a steady rise in student membership. For example from 4,192 at the end of 2008 to 4,506 at the end of 2009; a 7.5% rise. Over the following six months to July 2010, there was a further 5% rise in student membership to 4,727. Upon graduation from their course, 1,358 students became full members of Equity.

2.31 Equity has developed the foundations for engaging students in union activity and, by offering a reduced fee for students, provided accessible employment support and advice in a difficult industry and at difficult times. It is crucial therefore that the union maximises the channels of communication and feedback from students to ensure membership continues to grow.

Strand 4: Equalities

2.32 The union movement through Unionlearn has an increasing focus on the equalities agenda. Improving awareness of equalities among members and training members to act appropriately in support of individuals and within the workplace has become one of a number of key priorities for Unionlearn. This is of particular relevance for Equity, representing an industry where employment contracts are often individually negotiated and where adherence to employment laws can be evaded.

Aims

2.33 The objective of the equality strand was to develop and deliver equality training to a cohort of members to ensure that employees can be appropriately supported on issues relating to equality in the workplace. Encouraging members to take union representative positions has historically been challenging for Equity, as for example it is perceived that being a union official may not endear members to their potential employers.

2.34 The trained members would be Equity's first Equality Representatives and would be distributed throughout the country.

Activity Details

2.35 The TUC provides a framework for delivering equality training. The training has been accessed through a Unionlearn accredited centre where there is assurance of the quality and appropriateness of training for the industry. Equality Representative training was purchased which met the requirements of Equity and also took into account the freelance nature of members' work and the lack of fixed workplaces. The training centre developed the training materials, which covered various aspects of equality, including:

- sex and race discrimination;
- disability;
- recent discrimination legislation;
- dealing with members' issues.

2.36 Members were encouraged to sign-up to Equality Representative training through a series of mail shots and articles in the Equity magazine. Members were informed of the role that Equality Representatives should play and the availability of training courses.

2.37 Equality Representatives will be given their own area within the website to communicate with each other through a forum and have shared information resources. Equity (along with the TUC and Federation of Entertainment Unions) has planned further work to develop more training aimed specifically at ethnic minority members.

Impact of the Training

2.38 A target of 31 trained members was set and exceeded, as 49 members undertook the training in London, Leeds and Manchester. Therefore, having started from a base of zero trained Equality Representatives, the union now has almost 50 Representatives in place throughout the country.

2.39 A job description detailing the role of the Equality Representative has been developed and agreed by Equity which puts the role on a more sustainable basis.

2.40 The union promotes equality through a set of four committees:

- members with disabilities committee;
- lesbian, gay, bisexual and transgender (LGBT) committee;
- minority ethnic members committee;
- women's committee.

2.41 As a result of the capacity building activities undertaken in the Engagement Programme, Equity is working to ensure that all newly trained representatives are aware of the structures that operate within the union, via packs of information/materials distributed to newly trained staff. This will help embed and sustain the value of Equality Representatives for the union and its members.

2.42 To ensure maximum impact of the role, it is important that momentum is maintained and that information relating to the newly trained representatives is available on the Equity website so that any member, who has an equalities issue, knows whom to contact. However there is currently no information uploaded on the site.

3 CONCLUSIONS

- 3.1 Equity has used the funding to develop both awareness and engagement in the union, but also to build capacity and expertise among activists that will help ensure the union continues to grow and have a positive influence on employment in the industry.
- 3.2 The funding has been a crucial factor in the transformation of Equity's election procedures. The changed election methods have resulted in increased participation in Council and Committee nominations and elections. Participation appears to be growing at each election, which suggests that the campaign to raise participation has built momentum. Maintaining this momentum may be the next challenge.
- 3.3 Awareness of the union among non-members has been a key focus for Equity and the DVD has achieved excellent 'reach' and appeal through a wide variety of distribution channels. This has been supported through the Equity magazine which continues to be a vital method of linking up the strategies and priorities of Equity.
- 3.4 Equity has prioritised students in the participation agenda through an online survey to understand the level of engagement and type of support required. Ensuring students move to full membership is one of a number of priorities for Equity and results from the survey offer an insight into some of their current issues and concerns. It is important that Equity takes full advantage of this material: online surveys offer an easy way of reviewing the quality and relevance of the service and a means of staying in touch with its members. The phenomenal growth of social media sites in the last few years may be replaced by growth in other communication tools in coming years; therefore keeping abreast of any changes will be important.
- 3.5 Equity has developed capacity and expertise with the equalities training undertaken. However, too often we have reported high levels of inactivity among trained representatives in a number of unions resulting from a lack of support structures and communication across roles. It is important that these trained representatives are appropriately supported by the Equalities Officer and information pertaining to equality representatives is uploaded on the website.

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