

# TUC Equality Audit 2011





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## Foreword by Brendan Barber



The biennial TUC Equality Audits are an important opportunity for us to assess unions' efforts to further equality. They began in 2003 following a Congress rule change in 2001 recommended by the General Council's Stephen Lawrence Task Group. This change made it a requirement of affiliation to the TUC for a union to have a clear commitment to promote equality for all and to eliminate all forms of harassment, prejudice and unfair discrimination in its own structures and through all its activities.

The 2011 Audit focuses on unions' internal activities – how unions are taking equality into consideration in their rules and structures, organising activities, membership services and employment practices. Alternative Equality Audits focus on how unions are influencing employers through collective bargaining and representation. Once again, I'm pleased to report that we had a very high response rate to the survey, with the unions responding accounting for 97 per cent of all TUC-affiliated union members.

The Audit shows that, since the last similar Audit in 2007, more unions are carrying out membership recruitment activities specifically targeted at women, black workers, disabled workers, lesbian, gay, bisexual and transgender (LGBT) workers and young workers. It also reveals that more unions are monitoring the make-up of their shop stewards and other reps by the different protected characteristics and there has been a significant increase in the proportion of unions who are seeking to encourage women, often under-represented in these roles, to put themselves forward. Although still a minority, the proportion of unions using reserved seats to achieve more representative executive bodies and conference delegations is increasing too.

It is good to see that more unions, over two-fifths now, have a provision in their rulebook or in practice for the nomination or appointment of equality reps in the workplace. The TUC has trained hundreds of equality reps since it launched its

specialist courses in 2009 and although they still lack the statutory recognition guaranteeing them the time off to do their duties that other reps have, this Audit indicates that a significant proportion of unions recognise the valuable role such reps can play in raising awareness of equality issues in the workplace and pushing employers to adopt policies and practices that prevent discrimination occurring.

While the Audit results are encouraging, there is still more that can be done. At the present time, when public spending cuts, public service reform and cuts to welfare benefits are likely to widen equality gaps, it is important for unions to be reaching out, recruiting from and representing the most vulnerable groups. I hope this report will help individual unions benchmark what they are currently doing and reflect upon what they can do better.

The next Audit will focus on unions' external activities – how they are pursuing equality in the workplace through collective bargaining. It will be carried out next year (brought forward from 2013) so that the Audit results can be presented to the main Congress, rather than the smaller 'new-style' Congress that will take place in Congress House every other year.



Brendan Barber  
General Secretary

## Introduction

This report is based on the results of the 2011 TUC Equality Audit, which was sent to the 55 unions affiliated to the TUC at the end of 2010.

Completed questionnaires were received from 48 of the 55 affiliates, representing 87 per cent of affiliates. At the time of the last equivalent TUC Equality Audit of 2007 there were 63 TUC affiliates, of whom 55 returned questionnaires – also an 87 per cent response rate.

In terms of membership, the unions responding to the 2011 Audit represent 97 per cent of all TUC-affiliated union members.

The high proportion of unions responding to the Audit means this report can be considered not only highly representative of TUC unions, but a true marker of developments in the areas covered over the last four years.

The smaller number of TUC affiliates – due entirely to union mergers in the intervening years – means that the actual numbers responding “yes” or “no” to any question in this year’s Audit cannot be fairly compared with those of 2007. (For example, if Amicus and the TGWU both answered yes to a question in 2007 they would have counted as two, whereas now, without any other change, they would only count as one.) For this reason it is important to consider percentages when comparing results over the four-year period.

The excellent response rates to the 2007 and 2011 Audits have partly been achieved because of the additional availability of an abbreviated version of the questionnaire for unions of fewer than 12,000 members. The option of an abbreviated questionnaire was chosen by the TUC to encourage smaller unions to participate in the Audit, after an evaluation of the 2003 Audit found that smaller unions were much more likely to find the long questionnaire too off-putting to complete.

In the event, the main 2011 questionnaire was completed by 35 unions and the abbreviated one by 13 unions.

While this system enables more unions to participate in the Audit, it makes analysis of the results a little complicated as some questions were only asked in the main questionnaire. To simplify this explanation in the text of this report, some analysis here refers to “larger unions” and some to “smaller unions”, in fact meaning unions who completed the main and abbreviated questionnaires respectively.

The analysis of the TUC Equality Audit questionnaire was carried out by the Labour Research Department, which also completed the commentary in this report. The report is based on information supplied by unions in response to the TUC Equality Audit questionnaire, except where noted.



# Part 1

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## TUC unions and the Audit: Questions asked and responses received

### Section A: Rules

#### TUC model equality clause

Twenty-eight unions (58 per cent) have adopted the TUC recommended model equal opportunity/employment clause, which states:

“The objects of the union shall include:

(a) The promotion of equality for all including through:

(i) collective bargaining, publicity material and campaigning, representation, union organisation and structures, education and training, organising and recruitment, the provision of all other services and benefits and all other activities;

(ii) the union’s own employment practices.

(b) To oppose actively all forms of harassment, prejudice and unfair discrimination whether on the grounds of sex, race, ethnic or national origin, religion, colour, class, caring responsibilities, marital status, sexuality, disability, age, or other status or personal characteristic.”

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#### Number (%) of unions with TUC model equality clause

2007	2011
22 (40%)	28 (58%)

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The number and percentage of unions adopting the clause is higher in 2011 than in 2007.

The 28 unions are: Accord, Advance, AFA, ASLEF, BFAWU, BSU, Community, CSP, CWU, EIS, Equity, MU, NACO, napo, NASUWT, NGSU, NUT, OURS, PCS, PFA, RMT, SURGE, TSSA, UCAC, UCU, UNISON, Unite and URTU.

Some unions have taken actions since the last audit to put the clause into practice. The GMB, for example, has developed an 'Equality through Inclusion' strategy, which aims to mainstream equality in the union (see box).

UNISON has developed a four-year equality scheme, which a foreword to the document says "gives us the tools to embed equality in our policy and practice". It is a plan of action for the union's entire operations for 2008–11, covering the way it organises, negotiates and bargains, represents members, develops policy, makes decisions, and provides services to its members and its own workforce. It contains 35 equality action plans which will be reviewed at the end of this year when a second, three-year scheme will be developed to build on the first.

Among smaller unions who have not formally adopted the clause, there is evidence that they are nevertheless addressing equality in terms of representation and activities. For example, SURGE has not incorporated the clause but it says: "We made a conscientious effort to ensure that the representatives of the union reflected the diversity of our membership." It adds: "We have also implemented more structure and focus towards our equality work".

**The GMB's 'Equality through Inclusion' strategy states: "The key to success will be in aligning equality to the core aims of the GMB and moving equality from the margins to the centre of all GMB activities." Five interlinked strategic priorities have been set, which are to:**

- increase membership
- drive the equality and inclusion bargaining agenda
- campaign on equality and inclusion
- enhance the profile
- drive organisational equality and inclusion.

**They are to be supported by key projects. For example, the priority to increase membership will be supported by community-based recruitment campaigns, for example, by targeting campaigns at places of worship.**

## Other national rules on equality

Thirty unions (63 per cent) have national rules on equality, almost the same percentage as in 2007. (The number is lower because there are now fewer TUC affiliates, as explained in the introduction to this report.) This includes some unions who have not specifically adopted the TUC's model clause but have something quite similar. BECTU, for example, has an object to "defend and actively promote equal rights and equal opportunities in the workplace, in the union's structures and in the community, and to challenge all forms of discrimination irrespective of gender, race, sexuality, disability, age or religion, by all means considered appropriate by the National Executive Committee and to include the standards of conduct as set out in rule 24fv."

Several unions have specific rules allowing for discipline of members who act in a discriminatory way. Usdaw's rule 20, for example, sets out the power of a branch to expel members acting in a racist or sexist manner, while the FBU's rule on internal discipline states that it is an offence if a member "discriminates against, harasses or bullies another whether on grounds of race, creed, sex or sexual orientation or otherwise".

The CSP does not have a union rulebook but members must adhere to the CSP Rules of Professional Conduct. Detailed guidance accompanies each rule in the Code, and the guidance under rule 2 seeks to ensure members do not discriminate against patients. It states: "... discussion should also occur if the physiotherapist objects to treating a patient on the grounds that the patient's behaviour towards the therapist is unacceptable ... if however the reason for not wishing to treat a patient is because of his/her sex, religion, race, sexual orientation or medical condition, it is unlikely that any change of physiotherapist would be appropriate or should be tolerated."

Many of the unions also have rules relating to equality structures within the union, which will be examined in other sections of this report.

### Number (%) of unions with national rules on equality

2007	2011
34 (62%)	30 (63%)

## Rules related to far-right or racist organisations

In February 2007, the European Court of Human Rights held that UK law, which prevented Aslef from expelling a member of the British National Party (BNP), violated the union's right to freedom of association. The Trade Union and Labour Relations Act 1992 was subsequently amended to allow a union to expel a member of political party if membership of that party is contrary to a rule or an objective of the trade union.

Twenty-one unions (44 per cent) have a rule related to membership of far-right or racist political parties – a higher proportion than in 2007. (The question was worded slightly differently from 2007 when it asked about far-right or racist organisations.)

The 21 unions with such rules are: Accord, AFA, ASLEF, BECTU, BFAWU, Community, CWU, EIS, FBU, HCSA, NASUWT, NUJ, PCS, PFA, SoR, SURGE, UCAC, UCU, UNISON, Unite and Usdaw.

A comprehensive example of a rule is BECTU's, which states:

Any person who is or becomes a member of an organisation which the National Executive Committee considers to be a fascist or racist organisation or who supports or circulates material or speaks on behalf of any organisation concerned with disseminating racist beliefs, attitudes or ideas or who undertakes actions against others (whether members or non-members) designed to discriminate on the grounds of sex, race, ethnic or national origin, religion, colour, class, caring responsibilities, marital status, sexuality, disability, age or other status or personal characteristic, shall be subject to the disciplinary procedures under these rules and may be expelled from the union.

And SURGE brought in its procedures as "we have a high membership population within the Yorkshire area, where there is an increase in far-right support".

### Number (%) of unions with a rule on far-right groups

2007	2011
18 (33%)	21 (44%)

A number of other unions have rules which they feel allow them to expel members who are also members of organisations whose objects run in opposition to the union's. ATL, for example, says its rules allow for expelling members who break its conduct policy or who act in a way that would bring the Association into disrepute.

The GMB has a rule that membership of other organisations has to be compatible with the aims and rules of the GMB. And the POA has a policy on membership of far-right racist political parties, which it has used to expel members.

In addition Equity was due to be putting the issue to a membership referendum in early 2011. It is proposing a rule change to enable the union to expel (or not take into membership) those engaged in conduct in breach of the union's equal opportunities and anti-discrimination objects. And UCAC may revisit its members' code of conduct "to put an extra focus on extremist views".

The FBU goes a stage further than its own internal rule, with a policy of lobbying other fire service membership organisations and the employers to implement policy which would not allow any member of the Fire Service to be a member of any organisation whose constitution, aims, objectives, policies or pronouncements, contradict the general statutory duty to promote race equality. Any such organisations specifically include the BNP.

Similarly PCS has been negotiating with the Cabinet Office, the main civil service employer, to introduce rules to make membership or support for far right organisations a bar to employment and an issue of gross misconduct for civil servants. This has already been achieved for all staff within the National Offender Management Service (previously known as the Prison Service) and the Metropolitan Police.

NASUWT organised a major campaign to get the government to bar members of racist and fascist organisations from working in schools (a government review is ongoing). And in terms of employment within NASUWT, the union requires all job applicants to declare whether or not they are or have been a member of the BNP. NASUWT says it "is committed in all aspects of its recruitment and selection practice and training to ensure that all staff are committed to the fight against racism and fascism".

The NUT says its political fund is used only for the purpose campaigning at elections against political parties and their candidates who promote racist, fascist and similar views.

The HCSA amended its "cessation of membership" rule in 2007 to give the Executive Committee the power to expel a member who "becomes associated with any

organisation which the Executive considers undesirable or against the interest of the Association". And Usdaw has a rule giving branches the power to expel any member who acts in a racist manner.

## Section B: Membership and structure

### Statistical records

This section looks at the number of unions that have statistics on the diversity of their membership and participants at different lay levels of the union.

Unions were asked whether they gathered statistics on the proportion of women, black, disabled, LGBT and young members. Figures for black, disabled and young members were to be as defined by the union. The category LGBT was used to reflect current union structures, which usually cover transsexual and transgender members together with lesbian, gay and bisexual members.

Eighty-three per cent of unions have statistical records for the number of women in membership, around the same proportion as in 2007 (85 per cent).

However, the proportion of unions with disaggregated membership figures for all other categories of member is below half in each case. 44 per cent of unions have records on black membership, 27 per cent on disabled members, 13 per cent on LGBT members and 48 per cent on young members.

There appears to have been no increase in the monitoring of union membership by any of these characteristics since the 2007 TUC Equality Audit.

However, there have been advances in the collection of disaggregated statistics on activists of various types. This is particularly so for collection on the numbers or proportions of black, disabled and LGBT activists.

A higher proportion of unions collect such information on stewards and workplace reps, which follows an already significant growth in this work noted in the 2007 TUC

Equality Audit. This year the advance is particularly marked in terms of statistics on black, disabled and LGBT reps. 42 per cent of unions had statistics on black stewards or reps compared with 31 per cent in 2007; 31 per cent had figures for disabled reps, compared with 22 per cent last time; and 13 per cent had figures for LGBT reps compared with just 7 per cent in 2007.

The proportion of unions that have statistics on disabled activists has grown for all areas of representation, most notably for national executive members, where 44 per cent of unions now have them compared with 31 per cent in 2007.

And there is clearly growing confidence in the wisdom of collecting statistics on LGBT activists, which has hitherto been considered a sensitive area. The proportion of unions collecting these figures has risen sometimes quite dramatically from a very low base.

For example, 17 per cent of unions now have figures on the proportion of branch officers who are LGBT, compared with just 4 per cent in 2007; 23 per cent have figures on LGBT representation among their own conference delegates, compared with 7 per cent in 2007; and almost one in three unions (31 per cent) have figures on LGBT representation on their national executives compared with 18 per cent in 2007.

**Percentage of unions which have disaggregated statistics at various lay levels (i.e. % answering yes)**

	<b>Women</b>		<b>Black</b>		<b>Disabled</b>		<b>LGBT</b>		<b>Young*</b>	
	<b>2007</b>	<b>2011</b>	<b>2007</b>	<b>2011</b>	<b>2007</b>	<b>2011</b>	<b>2007</b>	<b>2011</b>	<b>2007</b>	<b>2011</b>
<b>Membership</b>	85%	83%	42%	44%	35%	27%	11%	13%	49%	48%
<b>Stewards or workplace reps</b>	56%	60%	31%	42%	22%	31%	7%	13%	40%	42%
<b>Learning reps</b>	40%	44%	20%	33%	15%	21%	9%	6%	29%	27%
<b>Health and safety reps</b>	49%	46%	25%	31%	18%	25%	5%	8%	33%	35%
<b>Branch officials or officers</b>	53%	50%	29%	35%	22%	27%	4%	17%	31%	35%
<b>Equality reps in branches or workplaces</b>	24%	29%	20%	23%	16%	19%	5%	10%	16%	19%
<b>Delegates at most recent union conference</b>	56%	58%	40%	38%	25%	29%	7%	23%	29%	23%
<b>National executive members</b>	76%	75%	58%	56%	31%	44%	18%	31%	40%	42%

\*As defined by the union

## Developments in membership monitoring

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|------------|---|
| <b>CSP</b> | For the first time this year the union carried out a monitoring exercise of members of the CSP Council and all standing committees, which produced 56 responses out of a possible 98. |
|------------|---|
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- |            |   |
|------------|---|
| <b>NUJ</b> | The union's most recent delegate conference agreed that the union should begin monitoring LGBT members in order that it can assess for the first time how many members define themselves as LGBT. |
|------------|---|
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- |            |   |
|------------|---|
| <b>NUT</b> | Has an ongoing internal campaign to get members from all strands to provide details, which are not available through statistical records. |
|------------|---|
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- |             |  |
|-------------|--|
| <b>UCAC</b> | Considering asking for details of these issues on the forthcoming new membership form. |
|-------------|--|
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|------------|---|
| <b>UCU</b> | A request for equality monitoring information returned a 54 per cent response rate for conference attendees and a 48 per cent rate for NEC members. |
|------------|---|
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- |              |  |
|--------------|--|
| <b>Unite</b> | Unite says that, while the information on its databases are more comprehensive than in 2007 (when it provided two separate responses to the TUC Equality Audit – for Amicus and for the TGWU), it is still being worked on. The union's computerised monitoring system records all categories except LGBT, although its internal committee and conference monitoring, which is confidential, includes LGBT (and religion or belief). |
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- |             |   |
|-------------|---|
| <b>Udaw</b> | Does not routinely monitor the ethnicity or disability of its membership but does monitor activists, that is, anyone that attends a union event or training course. |
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## Targeted membership recruitment activities

Unions were asked whether they had taken any specific action to recruit new members from specific groups over the last four years.

The most likely groups to be targeted were women and young people with in each case almost half of unions carrying out such activity since 2007.



In most cases there has been a significant increase in the proportion of unions carrying out targeted recruitment. The most dramatic increase is in recruitment activities aimed at young workers: the proportion of unions targeting this group has risen from 29 per cent in 2007 to 48 per cent in 2011. There were also significant increases in recruitment aimed at women, black workers, disabled workers and LGBT workers.

The only area showing a decline is in recruitment activity aimed at migrant workers, though this area had shown significant growth in the previous four-year period.

**Percentage of unions undertaking targeted recruitment activities to recruit members from different categories**

Women		Black		Disabled		LGBT		Young		Migrant workers		Others, e.g. specific faith	
2007	2011	2007	2011	2007	2011	2007	2011	2007	2011	2007	2011	2007	2011
38%	48%	33%	44%	25%	35%	22%	38%	29%	48%	38%	31%	11%	17%

## Women

For many unions, targeted recruitment drives are based on campaigning about topics of specific interest to women and recruiting women into membership through their interest in those issues.

Usdaw, for example, which has an ongoing campaign to support parents and carers that resonates most strongly with women workers, launched a new campaign in 2010 focusing on safe journeys to and from work for women workers. It says while the campaign is not primarily about recruitment, it sends out a strong message that the union is taking up the issues that matter to women workers. In addition a survey is available to reps encouraging them to speak to members and non-members to identify any specific issues within their own workplace. Usdaw says the survey is a useful tool for raising the profile of the union with women workers.

Over the last four years Equity has been running a high-profile campaign against the discrimination experienced by older women as performers on stage and screen and through that has sought to recruit into membership women working in the entertainment industry.

The FDA, NASUWT and Prospect have produced specific recruitment literature targeted at women, while Nautilus in 2010 set up nine women's forums open to all female members.

Napo is in the process of developing a women's strategy covering recruitment and engagement of women members.

## **Black workers**

Unions in the media and entertainment industries have been particularly active in running campaigns to draw black and ethnic minority workers into membership.

BECTU attributes its significant increases in BME membership to its long-running 'Move on Up' programme, which fosters access by BME broadcasting professionals to industry figures who can provide them with work opportunities.

The NUJ has also been a partner in 'Move on Up' and aims to recruit any non-members who attend the events. The NUJ has also been campaigning on the issue of the loss of black newspaper titles and the reduction in staff at *The Voice* newspaper and where possible recruiting black journalists who wish to have the protection of a trade union during periods of redundancies etc. They have also been recruiting successfully in sections of the BBC, particularly in areas such as BBC World Service.

Equity has organised events and meetings for BME performers and entertainment industry workers, one of the objects being to recruit non-members. The MU has also been involved in events for BME musicians.

In a similar vein but a very different industry, ASLEF has reps sitting on recruitment panels in the rail industry who work to encourage minority groups to apply.

Other initiatives include production of targeted recruitment leaflets and, in SURGE, the creation of a project to recognise diversity in the workplace by raising awareness of different cultures and religious beliefs. The TSSA has trained black reps to recruit more effectively, and its learning team has specific targets for recruiting BME members.

NASUWT has increased its BME membership by 2,500 since the 2007 TUC Equality Audit through a range of activities designed to ensure that the recruitment of BME members is embedded in the recruitment work of the union. The increase in membership has translated into an increase in the number of attendees at the annual BME Teachers' Consultation Conference from 107 to 270 between 2008 and 2010.

Unite has carried out a wide range of activities in this area including, during 2010 Black History Month, a national and regional BAEM organising campaign. This included setting up stalls in city centres and driving buses with messages and using them as a meeting and discussion point. The union also handed out the Tell It Like It Is survey card to highlight priority issues for BAEM people. The card is a survey of black people to discover their top employment concern from a list of five presented. The card also asks if workers wish to join the union or find out further information on joining or get more involved in the union and was used to build membership and participation of BAEM workers.

## **Disabled workers**

Several unions report producing recruitment literature targeted at people with disabilities, ensuring that general recruitment literature portrays images of members with disabilities or providing the literature in accessible formats.

Equity has been campaigning for the employment of disabled performers within the entertainment industry, with one aim being to recruit disabled performers into membership. Open meetings of disabled performers and opportunities for disabled workers to meet industry gatekeepers have been arranged.

The NUJ has campaigned on the issue of 'hidden disabilities' and encouraged disabled journalists who are not members of the union to join. It is also in the process of campaigning on mental health and stress and hopes to work with a relevant mental health magazine to convey the union's support for disabled journalists to a wider audience.

The TSSA undertook a project around dyslexia. It involved piloting techniques and ideas to recruit and organise workers with dyslexia, which the union was successful in doing.

Usdaw has published a poster highlighting the support the union can give to disabled members and has made a workplace survey available to reps to encourage them to speak to both members and non-members about disability.

NASUWT, in a similar vein to its work on recruiting BME members, has increased its disabled membership by over 1,800 since the 2007 TUC Equality Audit. This has

translated into an increase in the size of the annual Disabled Teachers' Consultation Conference from just 18 attendees at the 2008 conference to 50 in 2010. The union produces special recruitment materials and has run a range of campaigns of particular interest to disabled members including one on prejudice-related bullying and one on ensuring workplaces are fully accessible.

### **LGBT workers**

Fewer examples were provided by unions of specific recruitment activities targeting LGBT workers, although several pointed out that their internal LGBT networks and structures would be attractive to such workers considering joining their ranks. Nautilus in 2010 conducted a survey to gauge the type and degree of problems faced by LGBT members.

A number of unions made sure they presented a welcoming image to LGBT workers outside the union through appropriate images and so on in their literature and through participation in events such as Pride. Equity campaigns for greater and less stereotypical portrayals of LGBT people on screen. The Federation of Entertainment Unions and workers in the industry held an open evening for LGBT members to discuss LGBT hate crime.

The NUJ's membership form and communication material is currently being altered to take into account the recent decision to monitor LGBT status.

### **Young workers**

Again a number of unions felt that their internal youth activities were also an aid to recruitment. Several had carried out projects using the Union Modernisation Fund that had focused on youth activity within the union, which they hoped would help recruitment of young workers.

The NASUWT has a range of recruitment activities aimed at teaching students, who are primarily young. This includes:

- support for student teachers in partnership with the National Union of Students to provide a comprehensive package of representation and support both while studying and on teacher training placements

- recruitment at university “freshers’ fayres” and student union events
- ‘First Appointments’ lecture tour delivered by Barry Hancock, a former deputy head teacher and education consultant. This lecture visits 37 universities and gives students information on getting their first job, as well as information on the union and
- a range of specific recruitment materials for students, which includes a student guide, wall planner and bag.

The following table indicates some of the other activities unions have undertaken to recruit young workers into membership.

When universities stopped funding membership of the CSP for students on undergraduate training courses in 2007 the union developed a strategy to recruit student members including a targeted recruitment pack.	<b>CSP</b>
Specific application form for youth membership.	<b>Equity</b>
Annual civil service ‘fast stream’ ball organised by the union plus six months’ free membership for trainees.	<b>FDA</b>
Reduced student rate for membership and events held in music colleges and FE colleges.	<b>MU</b>
Holding a ‘next generation’ event this year.	<b>napo</b>
In 2010 visited all maritime training colleges to recruit officer trainees.	<b>Nautilus</b>
Held a meeting for young members and students which was attended by 120 aspiring journalists. Currently running a Cashback for Interns campaign and is offering support to any former journalism intern who would like to claim unpaid wages.	<b>NUJ</b>
Organises social events for young people within their (single) employer.	<b>SURGE</b>
Attends recruitment events at teacher training establishments/universities, local authority events for newly qualified teachers. Encourage reps to approach all newly qualified teachers to join and hold courses for newly qualified teachers.	<b>UCAC</b>

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**UCU** Produced an early careers guide and has seen an increase of nearly 5,000 new members (17 per cent) over last two years.

## **Migrant workers**

Targeted recruitment of migrant workers had been a big growth area at the time of the 2007 TUC Equality Audit, but was not reported by so many unions this time around.

Among those who did report activity were: the BACM, who had provided leaflets and a Labour Research Department booklet on employment rights produced in Polish for groups of Polish workers; and Usdaw who provides a recruitment leaflet in 34 different languages and is staging a community event for migrant workers.

BFWAU has had successes in targeting agency workers, particularly those from Eastern Europe, using its Polish representatives and the Polska website. The GMB has also targeted workplaces with high percentages of migrant workers, while the NASUWT has a range of support for and campaigns around Overseas Trained Teachers. Meanwhile NUJ branches have been encouraged to invite asylum seeker journalists to join and become active in their branches.

The PCS has secured temporary resource for a “learning organiser” who is currently running ESOL training courses in the London and South East region. The learning organiser will be focussing on using learning to organise migrant workers, mainly cleaning and security workers.

## **Targeted recruitment of reps**

Unions were also asked if they had taken any action to increase the numbers of shop stewards or branch officials from specific groups.

A minority of unions reported that they had targeted specific categories of member for recruitment of shop stewards or branch officers over the past four years, although the proportion targeting women had increased from 38 per cent in 2007 to 48 per cent in 2011.

There was a small growth in the proportion of unions targeting young and migrant workers – to from 27 per cent to 29 per cent and from 20 per cent to 23 per cent respectively – and a rise in those targeting other groups, for example those of a specific faith, from 2 per cent in 2007 to 10 per cent in 2011.

Percentage of unions taking action to recruit stewards or branch officials from equality groups

Women		Black		Disabled		LGBT		Young		Migrant workers		Others, e.g. specific faith	
2007	2011	2007	2011	2007	2011	2007	2011	2007	2011	2007	2011	2007	2011
38%	48%	38%	38%	27%	25%	27%	23%	27%	29%	20%	23%	2%	10%

Many of the efforts described in the previous section for recruitment of new members in the target categories are also aimed at encouraging existing members in the various categories to participate more actively in the union's work. (Organising campaigns often have both aims.)

But there are additional efforts to help and encourage target groups to become reps. These include training geared for specific groups of members, and the establishment of self-organised groups, part of whose functions are to support and help members to get more involved in the union. Unions which run special conferences for women, black members etc also see these events as having a positive impact on increasing participation by these groups in union activities.

The NASUWT has a comprehensive organising strategy designed to increase the number of activists from the different strands. This included an audit in November 2007 of its specialist conferences to see how attendance at those resulted in further union activity. The union reports that 18 per cent of conference attendees got involved in the democratic structure of the union after attending, in particular as union representatives, caseworkers or union learning representatives.

In 2006 PCS appointed an equality coordinator to lead on a project aimed at tackling under-representation and building supportive networks across the union. It reports that this work is progressing well and the equality coordinator role is now a permanent position within the union rather than a project post.

Unions targeting **women** specifically include SURGE, who said it actively trained and encouraged women reps to increase their experience and knowledge as the union needed to increase the number of women on its senior committee. The FBU's

Women's Committee runs an education programme through which members' activity at the workplace has increased, and UCU organised a 'developing activist network' event attended by over 30 women to encourage greater involvement in union activities by women.

Usdaw's Divisional Equality Forums visit workplaces with large numbers of women members in part to help generate new reps. They also organise regional weekend get-togethers for women to which women are encouraged to bring along another female member as a 'buddy'.

The FBU organises an annual school for **black members** and holds regional black members' meetings where participants are encouraged to become union reps. And unions belonging to the Federation of Entertainment Unions (BECTU, Equity, NUJ, MU, PFA and the Writers Guild), in partnership with the TUC's Equality and Employment Rights Department ran a training course in 2011 for BME members across these unions to give the necessary motivation, knowledge and confidence to play a more active role in their union and run for office.

Usdaw is currently running a project to increase the involvement of BME members in forthcoming shop steward elections and in company consultative structures. It is building on the success of a similar project organised in the run up to the last shop steward elections where there was a demonstrable increase in the numbers of BME stewards attending advanced shop steward training (e.g. in 2008 the numbers of BME members attending Tesco advanced shop steward training rose fourfold to 14% from just 3.1 per cent in 2007).

The NASUWT has established a new **Disabled Members'** Development Course, which explores the union's democratic structures and gets participants to plan their level of union involvement. And TSSA organised a disability mini-conference at its annual delegate conferences in 2009 and 2010.

Among unions that have been encouraging further participation by LGBT members in union activity are USDAW, which has been organising local 'LGBT friendly' get-togethers. The union reports that participants have gone on to take responsibility for generating further activity around LGBT issues, including organising the union's presence at Pride events. The union also launched a leaflet on rights for same-sex parents and ran a conference fringe session on homophobic harassment.



For **young members**, the CWU carried out a project under the Union Modernisation Fund aimed at supporting its Youth Empowerment Strategy and provided a dedicated resource focused on developing and supporting young reps. The ATL has worked to get young member networks integrated into branch structures, while the NUJ has changed its rules to allow student members to be nominated by branches to attend its delegate conference.

USDAW held a local get-together for **migrant worker** members in the North East and another event in Northern Ireland, while TSSA branches with high densities of eastern European workers have held meetings aimed specifically at involving such members in decisions. The NASUWT ran a UMF project around recruiting and involving overseas teachers which resulted in a dedicated website for this group and a number of events aimed at encouraging their participation in union activity.

## National equality officers

The majority of unions have an officer at national level whose main responsibility is equality. In the majority of cases this is an 'overall equality' role.

However, there are slightly more unions with separate equality officers for specific groups than in 2007. Thirteen unions (27 per cent) now have a separate officer for women, and the same number have a separate officer for black members. Nine (19 per cent) now have a specific officer for disabled members, 12 (25 per cent) have one for LGBT members and 11 (23 per cent) have one for young members.

### Proportion of unions employing officers and staff at national level responsible for equality groups

Overall equality		Women		Black		Disabled		LGBT		Young	
2007	2011	2007	2011	2007	2011	2007	2011	2007	2011	2007	2011
56%	58%	15%	27%	15%	27%	15%	19%	13%	25%	15%	23%

Some of the equality officers do have other responsibilities, particularly in smaller unions. However, since 2007 there has been an increase in the proportion of unions with a national officer dedicated to equality.

### Proportion of unions whose equality officers carried out other responsibilities

Overall equality		Women		Black		Disabled		LGBT		Young	
2007	2011	2007	2011	2007	2011	2007	2011	2007	2011	2007	2011
81%	61%	38%	31%	38%	46%	50%	44%	29%	33%	38%	64%

For those without any employed equality officers, in most cases the smaller unions, the main way they cover equalities work is through full-time officials. In a few cases it is dealt with through lay members of the national executive or even lay reps.

## Regional equality officers

The larger unions were asked if they employed any equality officers at a regional, group or sectoral level. One in three (34 per cent) of the larger unions now employ officers with responsibility for overall equality at a sub-national level – an increase from one-fifth (21 per cent) in 2007.

### Percentage of larger unions employing officers or staff at regional, group or sectoral level with clear responsibility for equality

Overall equality		Women		Black		Disabled		LGBT		Young	
2007	2011	2007	2011	2007	2011	2007	2011	2007	2011	2007	2011
21%	34%	15%	20%	15%	20%	15%	14%	15%	20%	15%	17%

Most of the sub-national equality officers have other duties (83 per cent of those with responsibility for overall equality) although it would seem that 43 per cent of the larger unions now have officers at this level whose sole responsibility is women's equality.

### Percentage of regional, group or sectoral equality officers as in the table above who also have non-equalities responsibilities

Overall equality		Women		Black		Disabled		LGBT		Young	
2007	2011	2007	2011	2007	2011	2007	2011	2007	2011	2007	2011
86%	83%	80%	57%	80%	71%	80%	80%	80%	71%	80%	83%

## Branch and workplace equality representatives

Unions were asked whether they had a rule or practice to elect or appoint equality representatives at a branch or workplace level (also referred to as *equality officers* by some unions).

Altogether, 20 (42 per cent) unions have branch or workplace equality reps, compared with 19 (35 per cent) in 2007. All 20 had reps covering overall equality with just six saying they also had them for individual equality strands.

The 20 unions with branch or workplace equality reps: are Advance, ASLEF, ATL, BECTU, CWU, FDA, GMB, napo, NASUWT, NGSU, NUJ, NUT, PCS, Prospect, SURGE, TSSA, UCU, UNISON, Unite and Unity.

The NUJ has had rules on electing workplace and branch equality reps for many years and until recently delivered an equality reps training scheme. While this course no longer receives funding, the union encourages branches and chapels to elect equality reps and recommends they attend one of the TUC's equality reps training courses or complete the online version of the training.

### **Unite equality reps**

Unite has a rule book position on union equality reps. Also it is a practice in some Unite workplaces to elect women's reps, black members' reps, disability champions, young members' reps and LGBT reps. Unite also has a Listening Support Network for members who are harassed or bullied at work. This service is supported by trained women, BME, disabled, LGBT or young member volunteers.

Its rule 18 on workplace representation states:

- 18.1** At each workplace, the members employed at that workplace, shall elect from amongst themselves, at least every 2 years, 1 or more of the following representatives:
  - 18.1.1** Shop stewards/workplace representatives
  - 18.1.2** Safety representatives
  - 18.1.3** Learning representatives
  - 18.1.4** Equality representatives
- 18.2** Election to one representative role shall not preclude election to another such role within the same workplace.
- 18.3** The method of election shall be by such means as authorised by relevant guidance which shall be issued by the Executive Council from time to time.
- 18.4** The Executive Council may group workplaces together for the purposes of representation where the number of members at each workplace is so small that representation and bargaining for the individual workplaces is not, in the opinion of the Executive Council, practicable.
- 18.5** The constituency of a workplace representative shall be the workplace from which they were elected, or such grouping of workplaces as was defined by the Executive Council under clause 4 of this rule.
- 18.6** Following election of a workplace representative the appropriate Regional Officer shall be informed of the election by the elected representative without delay. The Regional Officer shall ensure that the Regional Industrial Sector Committee and the Union's membership department are informed of the date of the election and the identity, constituency and contact details of the elected workplace representative.
- 18.7** The Executive Council may issue guidance on the powers and procedures of the Regional Industrial Sector Committee in relation to ratification of such election. The Regional Industrial Sector Committee shall ensure compliance with such procedures.

The NASUWT offers ongoing support through termly equality officers' briefings and resources. It has developed an equality officers' page on the union's website, which contains information and resources on equality issues.

The NUT has been running a Fairer Futures project which in part has encouraged divisions (branches) to elect equality officers. It reports "a good degree of success" in this.

There may be further developments in the months to come, with the MU considering training up roving lay equality reps (workplaces are rare for musicians), and SURGE is looking to develop local officers across the country to work with the national equality officer. PCS is considering whether to enact a recommendation from its UMF equality reps project to have a lay equality officer in every branch (this is currently optional and exists in some branches depending on the size and membership profile of the branch).

UNISON introduced a rule change in 2010 to include provision for equality representatives in branches. The rule states that "one or more equality representatives shall be elected annually for each work group or workplace by the members in that group or workplace in accordance with branch arrangements". It also says "Equality representatives shall (1) be accountable within branch arrangements to the members they represent and the branch committee (2) carry out their duties in accordance with UNISON's Rules, the Code of Good Branch Practice and the UNISON *Equality Representatives' Guide*."

## Committees

The larger unions were asked whether they had a national body or committee for any specific categories of members.

The most common sort of committee was for overall equality, present in 63 per cent of unions. This was very slightly more than in 2007, when 59 per cent had such committees. But smaller proportions of unions reported having committees covering specific strands in 2011 than in the 2007 Audit.

These changed proportions are partly a reflection of particular union mergers in the intervening four years. However, there has been one notable change in structure

affecting the figures, which is at the GMB. Following a CEC report agreed at the union's 2007 Congress, the union replaced its separate equality bodies for the different strands with a single equality body (see box).

One single-strand committee was new to the 2011 Audit, however, as Equity created a young members' committee for the first time in 2010. This was the outcome of a number of events and meetings that had been organised to engage with young members.

#### Percentage of larger unions with national body or committee for equality groups

Overall equality		Women		Black		Disabled		LGBT		Young	
2007	2011	2007	2011	2007	2011	2007	2011	2007	2011	2007	2011
59%	63%	50%	49%	62%	51%	56%	40%	56%	46%	35%	34%

#### GMB changes equality structure

The CEC report, *Progressing Equality Issues in the GMB* was agreed at Congress 2007. This stated: "The GMB's current equality structures are seen by the majority of those who were consulted during the review as being unproductive and outmoded."

The report recommendations included:

1. The current separate equality bodies be replaced by a single equality body which will bring together GMB equality experts and act as a single source of information, advice and guidance, a single point of contact for all stakeholders
2. The newly-formed GMB National Equalities Forum will be responsible for driving the union's equality and diversity agenda and providing a powerful vision and a strategic direction to our organisation.

After the first two years of the NEF (2008–10) and following a motion at Congress 2009, a new selection process was agreed by Congress 2010. Members were invited to apply for posts and to state how they could fulfil a defined role description and specification. Short listing, interviews and appointments were conducted by two internal officials and a senior TUC official. Monitoring of the composition of the new NEF shows that:

- 59 per cent are women – in line with membership make up
- 24 per cent are ethnic minority – approximately 14 per cent above the national average for ethnic minorities in the population
- 24 per cent are LGBT.

### Positive action provisions in Equality Act 2010

In the Sex Discrimination Act 1976 there was a specific provision that allowed trade unions to reserve seats on their elected bodies for women where it was necessary to secure a reasonable lower limit of the numbers of women serving on such bodies.

There are no specific provisions in the Equality Act 2010 permitting reserved seats, however, the general provision on positive action in s.158 of the Act permits organisations to take any action that is a proportionate means of:

- enabling persons who share a protected characteristic (e.g. women, black people, disabled people, young people, LGBT people) to overcome or minimise a disadvantage associated with that characteristic
- meeting the different needs of people who share a particular protected characteristic
- or enabling or encouraging people who share a particular protected characteristic to participate in an activity in which they are under-represented.

Policies or practices such as reserved seats would be covered by s.158 provided they were a proportionate way of tackling disadvantage, met the different needs of a particular group or addressed under-representation which the union reasonably believed existed.

### Reserved seats

Unions were asked whether they had reserved seats for each category of member for different bodies within the union. Some questions were asked of all unions and some of the larger unions only.

All unions were asked about their national executive, their delegations to their own union conference and to TUC Congress. A slightly higher proportion of unions now have reserved seats for the equality strands on all three bodies than was the case in 2007, with the exception of young members on national executives, where the proportion with reserved seats has fallen

The figures show that, as in 2007, unions are more likely to have reserved seats on their national executive for black members than for women. Twelve unions (25 per cent) do so for black members and nine (19 per cent) do so for women.

Similarly nine (19 per cent) unions have reserved seats for black members on their own union conference delegations while eight (15 per cent) do so for women.

However, the reverse is true for delegations to TUC Congress, where 12 (25 per cent) of unions have reserved seats for women and nine (19 per cent) do so for black members.

There appears to have been a growth since 2007 in the proportion of unions who have reserved seats for their own conference delegations for LGBT members (now seven, or 15 per cent, do so) and for young members (now 5, or 10 per cent, do so).

**Percentage of all unions with reserved seats for equality groups**

	Women		Black		Disabled		LGBT		Young	
	2007	2011	2007	2011	2007	2011	2007	2011	2007	2011
<b>National executive</b>	16%	19%	20%	25%	5%	8%	4%	6%	5%	2%
<b>Delegation to union conference</b>	15%	17%	15%	19%	7%	10%	9%	15%	5%	10%
<b>Delegation to TUC Congress</b>	24%	25%	13%	19%	5%	8%	7%	8%	5%	8%

Larger unions only were asked whether they have reserved seats on branch committees and sectoral executives and their delegations to sectoral conferences, government and international union bodies. There were far fewer examples of reserved seats in these cases although one in five unions now have seats for women on some of their delegations to international union bodies.

**Percentage of larger unions with reserved seats for equality groups**

	Women		Black		Disabled		LGBT		Young	
	2007	2011	2007	2011	2007	2011	2007	2011	2007	2011
<b>Branch committee</b>	3%	3%	0%	3%	0%	3%	0%	3%	3%	6%
<b>Sectoral or group executive</b>	9%	14%	3%	11%	0%	3%	0%	3%	0%	3%
<b>Delegation to union sectoral conference</b>	12%	9%	6%	9%	0%	3%	0%	3%	3%	6%
<b>Delegations to government</b>	3%	9%	0%	6%	0%	3%	0%	3%	0%	6%
<b>Delegations to GUF/ICFTU/ETUC conferences</b>	12%	20%	0%	11%	0%	6%	0%	6%	0%	6%

Developments in this area since the 2007 TUC Equality Audit include those at the NUT, which has introduced reserved seats on its national executive for black, disabled and LGBT members (although those for disabled and LGBT members will not come into place until 2012). In Unite, formed after the 2007 TUC Equality Audit was collated, minimum proportionality has been introduced into the rule book.

The NUJ, which has reserved seats on its national executive for black and disabled members, considered requiring branches to make gender-balanced nominations for

all union posts, but this was rejected by the annual conference in 2009. According to the NUJ: "the union's Equality Council, which brought the motion, was not convinced by the idea of one or more fixed seats for women on the National Executive since women make up more than 40 per cent of the union and were therefore not a minority group which needed to ensure representation. It was therefore agreed to argue the proportionality argument and this debate is still on-going as part of a major campaign by the Equality Council to improve representation of women."

Equity, which has a reserved seat for black members on its Council and reserved seats for its annual representative conference (ARC), will be considering the issue further as part of its Diversity of Union Engagement Working Party, which is due to report this year. Equity is also currently formulating a mentoring scheme for women members to encourage women to stand for election to Council. This mentoring scheme was adopted as union policy at the 2010 ARC.

The NASUWT has introduced a bursary system for local associations (branches) who send first-time delegates to annual conference. This has facilitated the involvement of members from under-represented groups.

PCS may be considering extending its reserved seat mechanism – currently in use for black members – to other under-represented members such as LGBT. And in ATL the matter is under review. In CWU "it is an issue that the National Equality Officer is exploring very closely in her efforts to ensure there is better proportionality within our union".

### **Impact of reserved seats**

A few unions commented on the impact of reserved seats on equality within the union.

ASLEF, which holds a small conference once a year with 68 delegates, said reserved seats allowed minorities within the union to be represented, to input into union rules and the creation of policy.

MU reported that members who stood for election to the equality committee had not been seen in any of its other union committees and structures. It described the result as very positive.



NASS said the introduction of reserved seats for women in the first Executive Council led to more women generally being elected.

UNISON feels its 'proportionality' mechanisms have been effective in building a more inclusive union (see box). Participation levels and rates continue to increase. It says more members from equality groups participate in decision-making at all levels and that more women, in particular, now chair key strategic committees. This is also noticeable at service group and regional levels, with many women now holding

#### **UNISON proportional and fair representation**

**UNISON's rule book provides for guaranteed seats. For example:**

- two reps from each self-organised group at the national delegate conference with the right to attend and speak
- four additional seats for black members and a young member's seat on the National Executive Council with full voting rights
- service groups' national conferences include two reps from self-organised groups and the Young Members' Forum
- TUC and Labour Party delegations include guaranteed representation for equality groups.

There is also a rule book requirement on branches to ensure proportionality and fair representation in the composition of their delegations to national and service groups conferences, so there is a higher level of representation for equality groups in addition to the minimum guaranteed seats. Women's representation at the National Executive Council, national delegate conference, sectoral and service group conferences and the TUC Congress are based on proportional reflection of the membership, which is currently 70 per cent female.

#### **Proportionality of PCS conference delegations**

The PCS has produced figures relating to its rule requiring delegates to TUC conferences (who are elected at its annual conference) to reflect the proportion of women members (currently 66 per cent). These show that many of the target figures have been met:

Conference	Delegates	Target	Actual
TUC	14	7	6
TUC Women	8	8	8
TUC Youth	3	2	1
STUC	9	5	5
STUC Women	5	5	5
STUC Youth	2	1	1
Wales TUC	6	4	2
Wales TUC Women	2	2	2

positions as regional convenors. What is also emerging — is that black women are coming through this process.

## Representation at TUC statutory conferences

Larger unions were asked if they had any rule on the representation of the different groups of members at TUC statutory conferences.

Very few did, the most likely area for such rules being for the representation of women on delegations to the TUC Women's Conference, existing in 31 per cent of unions.

Percentage of larger unions with rules on the representation of the equality groups on delegations to TUC statutory conferences

Statutory conference	Women		Black		Disabled		LGBT		Young	
	2007	2011	2007	2011	2007	2011	2007	2011	2007	2011
Women's Conference	26%	31%	12%	14%	6%	11%	9%	11%	6%	14%
Black Workers' Conference	18%	11%	26%	29%	3%	9%	6%	9%	3%	9%
Disability Conference	15%	11%	9%	11%	21%	26%	6%	9%	3%	9%
Young Members' Conference	15%	14%	9%	11%	6%	9%	6%	9%	21%	20%
Trades Councils' Conference	3%	3%	3%	3%	0%	0%	0%	0%	0%	0%

Some unions, while they may not have a rule, have practices relating to fair representation at these conferences. For example, while NUJ rules say that delegates to the TUC Black Workers Conference must be black members of the union, and those to the Disability Conference must be registered with the union as disabled, there is not a parallel for the TUC Women's Conference. Instead there is 'an unwritten rule' that delegates to this (elected by NUJ delegate conference) must be women, and this has never been challenged.

Smaller unions of fewer than 12,000 members were asked if they generally sent delegations to the TUC statutory conferences. (It can be assumed that all larger unions do.)

Few smaller unions did send delegations, though where they did so, they were most likely to send delegations to the TUC Women's and Disability Conferences.

The proportion of smaller unions sending delegations to any of the TUC statutory equality conferences was significantly lower in 2011 than in 2007.

**Percentage of smaller unions (under 12,000 members) sending delegations to TUC conferences**

	2007	2011
Women's Conference	29%	15%
Black Workers' Conference	33%	8%
Disability Conference	19%	15%
LGBT Conference	24%	8%
Young Members' Conference	5%	0%

**Union conferences and seminars for equality groups**

Unions were asked if they ran regular national equality conferences or seminars for any of the groups of members. The Audit shows that fewer than half do so in each case, with the group most likely to benefit being black members, for whom 42 per cent of unions ran conferences or seminars – the same proportion as in 2007.

The most notable change is in the proportion of unions running conferences for young members, which has risen from one in four in 2007 to one in three in 2011.

**Percentage of unions holding national conference or seminar**

Women		Black		Disabled		LGBT		Young	
2007	2011	2007	2011	2007	2011	2007	2011	2007	2011
33%	38%	42%	42%	27%	31%	35%	35%	25%	33%

Larger unions were asked if they held any such conferences or seminars at levels other than nationally. Again fewer than half did so in each case. However, there has been an increase in the proportion running such conferences for LGBT members – from 22 per cent in 2007 to 37 per cent in 2011 – and for young members – from 29 per cent to 40 per cent.

**Percentage of unions holding national conference or seminar**

Women		Black		Disabled		LGBT		Young	
2007	2011	2007	2011	2007	2011	2007	2011	2007	2011
50%	40%	47%	43%	38%	29%	22%	37%	29%	40%

Unite's rules stipulate that its regions should hold conferences every two years for women, black, disabled and LGBT members as well as biennial national ones for these groups.

PCS reported that most of its larger groups, such as HMRC and DWP, hold annual seminars for the equality groups. And the NASUWT, whose consultation conferences

for the equality groups have expanded rapidly over the past four years, said they have prompted activity in a number of regions to establish targeted conferences for under-represented groups of members. In addition many regions are working to create equalities networks.

### Other points made about developments in structure

Unions were invited to make further points about developments in their equality structures over the past four years which are not specifically covered in the Audit. Below is an edited version of their comments.

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**ASLEF** Currently in the process of evaluating the equality agenda within ASLEF. Plans include a campaign to recruit more equality reps and widening their role. There is a move to make equality a more 'engaged' strand within the ASLEF structure.

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**BECTU** In May 2010, BECTU's black members' committee proposed a new diversity strategy for the union. It analysed BECTU's membership and, among other things, proposed a number of structural or organising measures:

- Routine ethnic monitoring of committees at every level of the union. The union to set realistic, achievable targets for the improvement of diversity on committees. This should include reviewing current practice to gauge whether there is anything that might impede progress.
- Branches to compare their own ethnic make-up with that of the workplace they are drawn from, and formulate their own action plan on the basis of their findings. This action could be in partnership with the employer.
- When drawing up its recruitment strategy the union should consider targeting BME workplaces that currently have little or no union membership.

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**Nautilus** Creation of a forum for women, which it sees as a major step forward for the union.

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**NGSU** Creation of a National Equality Officer role as an executive position (agreed at National Conference in 2007), which led to the creation of Area Equality Officers.

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**NUT** Currently exploring, in response to annual conference decisions, how to encourage the growth of black members' structures at different levels of the union. (A few divisions have strong groups currently.)

Three separate networks covering separate equality strands have been merged into one network that covers all strands.

SoR

On taking office three years ago when SURGE was a staff association, the current general secretary wanted to restructure the whole union “to progress to a modern employee representative body”. He particularly wanted to focus on equality because of the wide diversity of the membership. “Unfortunately due to our size, time constraints and continual redundancy exercises over the last two years, we have not been able to allocate as much resource as we would like, but we will continue to work towards our goals.”

SURGE

## Section C: The union as employer

### Staff equal opportunities policies

The unions were asked if they had an equal opportunities or non-discrimination policy relating to its own employees. Twenty-nine (60 per cent) had a policy. Among the 35 larger unions, 25 (71 per cent) said they had such a policy.

#### Proportion of unions with equal opportunities or non-discrimination policies for staff

2007	2011
62%	60%

Gender, race and disability equality were each specifically covered in 12 unions’ policies and LGBT status and age in 11.

#### Number of unions with equal opportunities or non-discrimination policies relating to each equality group

Women	Black	Disabled	LGBT	Age
12	12	12	11	11

71 per cent of large unions have a procedure for complaints affected by breaches of the equality policy.

#### Percentage of larger unions with equality complaints procedure for employees

2007	2011
71%	71%

## Reviewing staff pay and conditions

Between 40 per cent and 50 per cent of unions have reviewed staff pay and conditions to ensure they are not discriminatory – a very slight increase on 2007. The highest proportion of reviews – carried out by just over half of unions – was to check against gender discrimination in pay.

Among the 35 large unions, 20 (57 per cent) had reviewed staff pay and conditions to ensure there was no discrimination on grounds of gender, 18 (51 per cent) on grounds of ethnicity, 17 (49 per cent) on grounds of disability, 16 (46 per cent) on grounds of LGBT status and 19 (54 per cent) on grounds of age.

### Percentage of unions who have reviewed staff pay and conditions to ensure no discrimination

Women		Black		Disabled		LGBT		Age	
2007	2011	2007	2011	2007	2011	2007	2011	2007	2011
45%	52%	42%	44%	40%	42%	40%	40%	40%	46%

A number of unions gave more details on the manner of their reviews.

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**CSP** We have a comprehensive job evaluation scheme used to maintain internal pay equity.

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**FDA** There are only five pay spines and each of FDA's 23 posts is aligned to a pay spine. Staff progress through the spine at the anniversary date of their appointment. Conditions of employment universally applied to all staff regardless of grade.

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**NACO** All salaries and salary ranges have been reviewed by a third party and overviewed by the Executive.

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**napo** We are planning to undertake a job evaluation process which will include equality checking.

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**NASUWT** We conducted a comprehensive pay and grading review, using an external consultant, for all posts on administrative, clerical and support grades, which resulted in harmonising all groups and in narrowing the gap between these grades and the grades of officials, thus enhancing the prospects for staff in the former, who are predominantly women, to seek promotion to the latter. Because of this a number

of staff (all women) have been promoted from admin and clerical grades to more senior 'teacher-related' grades.

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There is an on-going process to harmonise all terms and conditions for clerical and admin staff and for officials, which have previously been set separately.	<b>Nautilus</b>
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All posts are graded by using a job evaluation scheme which was developed specifically for the union in consultation with external consultants. Prior to implementation the scheme was checked by an equalities expert. The union's employment conditions and policies are also regularly reviewed to ensure that they cannot lead to discrimination.	<b>NUT</b>
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This is undertaken particularly in relation to recruitment panels. A pay and grading review has recently been undertaken incorporating equal opportunities principles, including a joint Equal Pay Audit with GMB (the union representing staff). Proposals for equality proofing all employment policies are under discussion with the staff union.	<b>PCS</b>
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We are currently in the process of introducing a job evaluation scheme.	<b>Prospect</b>
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In 2009, TSSA concluded an equality proofed job evaluation process.	<b>TSSA</b>
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We employ only eight people, six of whom are women. The pay grades are based on Local Authority Green Book Pay Scales for comparable posts or levels of responsibility and were last reviewed when the job descriptions were reviewed.	<b>UCAC</b>
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Recently undertaken a job evaluation exercise and a new grading structure put in place.	<b>UCU</b>
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Implemented in October 2006 an equality-proofed pay and grading scheme, underpinned by job evaluation. All conditions of service were reviewed as part of this. The new scheme was independently audited at each stage to ensure it was equality proofed. Audit of pay and grading by independent consultants takes place every three years and actions are taken as appropriate. UNISON Equality Plan also has a series of actions which are reviewed annually.	<b>UNISON</b>
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## Flexible working

71 per cent of unions answered “yes” to the question: is flexible working available to all union employees? This compared with 67 per cent in 2007. However, in general this applies to requests to work flexibly, and whether the request is granted is usually dependent on the union’s operational needs.

Also, agreed arrangements will normally depend on the nature of the individual’s job. In BFAWU, for example, full-time officers do not have set hours and work on the basis of the hours needed to do the job, while office staff have flexi-hours which operates on the basis of there being adequate cover in the office during core hours. UNISON introduced a new flexi-time system for all staff in 2010 which replaced separate schemes for office-based staff and organisers.

## Positive action on recruitment

The most likely group to benefit from positive action policies in recruitment is disabled workers, whereas in 2007 it was black workers. Fourteen (29 per cent) unions said they used positive action in their recruitment practices to encourage more disabled applicants for posts, and this is a significant increase since 2007, when 16 per cent did so.

Similarly, in 2011, a much larger proportion (23 per cent) of unions reported using positive action in recruitment to encourage greater age diversity than in 2007, when just 11 per cent reported they did so. There were also rises in the proportion of unions saying they adopted positive action measures to encourage applicants from the other categories.

**Percentage of unions using positive action on recruitment**

Women		Black		Disabled		LGBT		Age	
2007	2011	2007	2011	2007	2011	2007	2011	2007	2011
15%	25%	25%	27%	16%	29%	16%	23%	11%	23%

The CSP is one of those taking positive action to encourage applications from disabled staff. It offers a guaranteed job interview for any applicants with disabilities who meet the fundamental job requirements. It has also participated in a programme to provide work experience opportunities for people with learning disabilities. The union’s advertising process is currently under review and it says it



will be “exploring the greater use of minority press in order to ensure our workforce is diverse and more reflective of local population”.

## Monitoring of staff diversity

Unions were asked if they had statistical records of the numbers of staff they employed from each of the equality groups. Over two thirds (71 per cent) of unions said they recorded the gender of staff, which is a higher proportion than in 2007.

However, a smaller proportion of unions reported that they monitored their workforce by the other characteristics compared to 2007.

Percentage of unions holding statistics on staff in categories

Women		Black		Disabled		LGBT		Age	
2007	2011	2007	2011	2007	2011	2007	2011	2007	2011
65%	71%	49%	44%	36%	29%	15%	13%	45%	38%

## Section D: Union services and training

### Service or benefit provision

Larger unions were asked if they provided any benefits or services specifically aimed at the equality groups.

As in 2007, the services that were most likely to be targeted at specific groups were regular publications, websites and trade union training. However, there was a decline in the proportion of unions providing regular publications targeted at women, black members and disabled members. By contrast, there was a big increase in the proportion providing regular publications for LGBT members. There was also an increase in those providing publications aimed at specific age groups.

Generally women were more likely to have union services aimed at them than were the other groups, although black members were the most likely to have specific helplines made available to them, such as PCS’s racial incidents helpline.

Overall, disabled members were the least likely group to have services or benefits targeted at them and, surprisingly, in 2011 no union reported providing specific website areas or helplines for this group.

Percentage of larger unions providing certain benefits or services to different equality groups

	Women		Black		Disabled		LGBT		Age	
	2007	2011	2007	2011	2007	2011	2007	2011	2007	2011
Legal benefits or services	21%	17%	21%	11%	21%	17%	21%	9%	21%	14%
Financial benefits	9%	17%	3%	6%	6%	17%	3%	6%	18%	23%
Website areas or services	41%	54%	59%	54%	35%	0%	44%	51%	41%	46%
Phone helplines	9%	14%	9%	20%	0%	0%	15%	11%	6%	11%
Trade union training	53%	49%	24%	34%	35%	31%	41%	31%	38%	31%
Other learning opportunities	26%	29%	24%	23%	21%	23%	24%	23%	18%	34%

## Service or benefit monitoring

Large unions were asked if they monitored their general service provision to see whether it delivers equality of access. In each case the proportion that did so was higher than in 2007. (The question excluded monitoring of trade union training, which was the subject of a separate question – see section below on Participation in trade union training, page 43)

Percentage of larger unions who monitor service provision

Women		Black		Disabled		LGBT		Age	
2007	2011	2007	2011	2007	2011	2007	2011	2007	2011
6%	20%	6%	17%	6%	20%	3%	14%	6%	17%

## Comments in relation to monitoring of service or benefit provision and subsequent action

- MU** Monitoring shows accessibility of communications, events and premises for disabled and visually impaired members and in summary shows reasonable access for disabled members. We are considering further staff training to improve access for other groups.

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The PCS collects data on applications to its benevolent fund according to ethnicity, disability and gender, which is used for annual statistical monitoring. This is soon to be updated to include further monitoring in relation to the Equality Act 2010.

**PCS**

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Monitoring questionnaire rolled out for annual delegate conference 2009 and 2010 and encouraged for all organised events and training.

**TSSA**

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We have recently introduced a case monitoring system which will in due course give us detailed information on the uptake of union services.

**UCU**

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UNISON's own three-year Equality Scheme, now entering its final year, requires that all parts of the union equality impact assess their work to ensure it delivers equality of access. Each head office unit and region provides annual reports on progress against agreed targets to improve equality in their area of service provision.

**UNISON**

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Education course attendance, legal services and the take-up of union benefits and services are all monitored. This has brought to light issues of under-representation and under-claiming from some sections of the membership. The union has a form that is completed by workplace reps and officers for reporting all cases of harassment, discrimination and bullying on grounds of sex, race, disability, sexual orientation, caring responsibility, age and religion. Monitoring of this has resulted in agreements and policies on eliminating and tackling harassment. The union has taken action to ensure diversity of tutors on courses as well as positive action to tackle under-representation. Training has been provided for reps on identifying dyslexia and supporting members.

**Unite**

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#### **NASUWT monitoring of service provision**

**One union that goes to some lengths to monitor service/benefit provisions and take-up is the NASUWT. The union reports that it has been collecting equality information when members join since 2003.**

**On receipt of an application, members are asked to complete the monitoring form.**

**Members who join on-line are asked to complete the equality monitoring form as part of this process. The union also continually updates its records by getting equalities information at events such as consultation conferences and when members seek access to casework services.**

*[continued overleaf]*

The union examines and reports on the equality impact of all areas of its work, as part of its annual report and in its regular reports to the national executive. All national executive standing committee agendas provide for discussion and review of equality matters in their work.

The union collects equality information for casework to ensure that it is dealing equitably, or even at all, with cases for those in minority groups within its membership.

The union is able to monitor NASUWT insurance claims by gender, ethnicity, disability, LGBT and age, where this information has been provided to the union by the member.

Equalities data on criminal law instructions and personal injury are collected, as are data in respect of refusal to teach ballots.

The union also records equalities data for members who apply for benevolence assistance. This information is provided by members on a voluntary basis.

A new casework management system was rolled out during 2010 which means from 2011 onwards, the union will have sophisticated reporting functionality, enabling it to monitor casework undertaken for each of the underrepresented groups.

## Taking discrimination cases to tribunal

Around half of unions said they monitor the number of cases they take to tribunals under each of the discrimination jurisdictions. This is an almost doubling of the proportions that said they did so in 2007. A number of small unions said they had too few cases to make monitoring meaningful.

Almost the same proportions of unions were monitoring cases under the newer jurisdictions of sexual orientation, religion or belief, gender reassignment and age as the more established ones.

### Percentage of unions monitoring discrimination cases

Sex		Race		Disability		Sexual orientation		Religion or belief		Gender reassignment		Age	
2007	2011	2007	2011	2007	2011	2007	2011	2007	2011	2007	2011	2007	2011
27%	52%	25%	52%	25%	50%	24%	48%	24%	46%	22%	44%	*	46%

\*not asked in 2007 as age discrimination laws had just been introduced at the time of the Audit

The NASUWT provided figures for the years 2007 to 2010, which showed that the bulk of its discrimination cases taken to tribunal had been disability discrimination ones, although the number of sex discrimination cases had increased in each year since 2007.

The RMT's monitoring also shows that disability accounts for the largest share of its discrimination cases with race close behind. In SURGE, the most common categories are race and religion or belief. While UNISON reported that it had submitted over 46,000 equal pay cases.

The larger unions were asked if they provided education or training for paid officials and lay reps on taking discrimination cases. Almost three quarters (74 per cent) did so for paid officials and 63 per cent did so for lay reps.

#### Percentage of larger unions providing training in taking discrimination cases\*

	Regularly	Ad hoc basis
<b>Paid officials</b>	31%	43%
<b>Lay reps</b>	34%	29%

## Participation in trade union training

Large unions were asked if they undertook equality monitoring of attendance at union or union-supported education or training courses. Only a minority did so, with monitoring by gender being the most common (49 per cent). Next came monitoring by ethnicity (43 per cent), disability (40 per cent), age (34 per cent) and, lastly, sexual orientation (20 per cent).

The proportions monitoring by age and disability had increased since 2007.

#### Percentage of larger unions monitoring attendance at union training

Women		Black		Disabled		LGBT		Age	
2007	2011	2007	2011	2007	2011	2007	2011	2007	2011
50%	49%	44%	43%	35%	40%	18%	20%	24%	34%

A number of unions made comments on the outcome of their monitoring. Below is an edited version of these.

Of 2,245 activists undertaking CWU training in 2010, 16 per cent were women. The collection of data on disability relates to individuals letting the union know if they require any particular support or assistance. This system works very well and the union reports an increase in disclosure, particularly among people with learning disabilities, largely due to the positive support we can provide.

**CWU**

**NASUWT** The percentage ratio of women to men participants on trade union courses (47.6 per cent to 52.4 per cent) was a 4.5 per cent improvement on the figures from 2008 in terms of better reflecting the NASUWT's membership profile. In particular, women members attending the stage one reps courses totalled 225 of the 444 participants, a majority for the first time ever. A majority of women members also attended the Behaviour Management Course in 2009.

**PCS** In relation to the 797 members undergoing formal union learning in 2010, 428 (54 per cent) were women, 7 per cent were disabled, 606 reported their ethnic origin, of whom 91 were black (15 per cent), 762 reported age, of whom 90 (12 per cent) were under 27.

**UNISON** The union monitors the take-up of stewards and health and safety representatives training by gender. The results for 2010 show that for 53.1 per cent of those doing basic steward training were women as were 50.1 per cent for basic health and safety rep training.

Between 30 per cent and 40 per cent of unions took steps to encourage members from the five categories to participate in their education or training courses. This was a significant increase on the proportions who said they did so in 2007. The biggest rises were among those actively encouraging black members and those from particular age groups to attend training.

**Percentages taking steps to encourage participation in education/training by categories**

Women		Black		Disabled		LGBT		Age	
2007	2011	2007	2011	2007	2011	2007	2011	2007	2011
35%	40%	25%	38%	31%	38%	24%	31%	20%	31%

Several unions reported advertising or promoting their courses through channels which would reach the target group, and a number referred to running shorter courses to enable more members (generally women) who have caring responsibilities to attend.

The CWU says that women and black members have traditionally been under represented on its activist training courses and so it has a policy of allocating women and black members places on courses as a priority. It also provides childcare facilities for students on residential courses. It has also designed courses aimed at making women better equipped to take on roles within the union.

The union also reports that it has invested in a large number of accessibility measures to increase participation by people with disabilities. This includes specialist software and support for dyslexia and awareness training for tutors and staff, installation of a hearing loop at its residential training centre, and wheelchair access improvements throughout the residential training centre.

It adds that through delivering specialist short courses it has been able to encourage under-represented groups to participate in more advanced courses that they may not have felt confident enough to take part in previously.

The TSSA carries out disability assessments of training courses including provision for learning needs.

The CSP provides a contribution towards any carer costs incurred by members attending steward and safety rep training, while the NUJ says: “We endeavour to take into account access to courses in terms of location, timing and disability or diet access needs”.

Usdaw takes account of school holiday periods and religious festivals when deciding the timing of its courses and also states that: “Provision is made for the nomination of one additional woman activist from each of the union’s seven regions to the second series residential summer school course ‘Organising women workers’.”

## **Diversity training for lay members**

Twenty-seven of the 35 larger unions (77 per cent) provided equality or diversity awareness training for lay officials, reps and members, slightly more than in 2007, when 24 did so.

Some unions, including some of the smaller ones, said this was an integral part of basic reps courses and other standard union training. However, a number also ran specific equality-based courses.

The CWU covers equality or diversity training in a number of ways. It requires all CWU lay reps to undertake a mandatory one-day equality and diversity course, which is available as a classroom-based course or in exceptional circumstances as an online course. In addition, equality is embedded in its standard representatives’ training at all levels and equality activities are included in training courses for health

and safety representatives and union learning representatives. The union also provides more in-depth training for equality reps and those with a specific interest in equality issues through a two-week Equal Rights in the CWU programme.

The CSP has a slightly different approach. The union has developed an in-service training package for its local stewards to use to raise awareness of equality issues among members. In 2010 it also published its *Equality and Diversity Toolkit*. This was developed as a practical guide for CSP stewards, managers and members. One copy was sent to a steward in each workplace (both NHS and non-NHS), along with a second copy for them to give to their service manager. Stewards and managers were asked to use the toolkit as a resource for raising awareness among members. It includes sections on the various equality strands, each of which is supported by suggested exercises such as quizzes and case studies which they are asked to use at staff meetings to encourage discussion about these issues.

## Section E: Campaigns and communications

### Catering for visual or hearing impairments

Half of unions (52 per cent) reported having taken some measures to make their campaigns and communications materials available or accessible to people with visual or hearing impairments, a similar proportion as in 2007.

**Percentage of unions taking measures to make campaigns and communications materials available/accessible to those with visual/hearing impairments**

2007	2011
52%	52%

Examples of some of the efforts made to ensure disabled access to campaigns and communications are set out in the table below

<b>Accord</b>	Audio copies of publications have been made available for visually-impaired members.
<b>ATL</b>	Provide large print on request. The website has information on how to alter display settings to improve readability.



Two members of EC have serious health problems and have virtual meetings via conference calls.	<b>BACM</b>
Always offer large print and when the website was developed a lot of work went into making sure it was suitable for disabled users.	<b>BECTU</b>
Braille, CD or tape provided of all relevant materials including edited version of the magazine.	<b>Community</b>
All recruitment and other literature is available in alternative formats.	<b>CSP</b>
All publications are available electronically in bigger print and any provision for visual or hearing impairments are available on request.	<b>CWU</b>
On request all main publications are provided in audio format. Large print version of union materials are provided on request. Website has text enlargement facility and text only. Sign-language interpreters are used at union conference when required.	<b>Equity</b>
An audio version of public service magazine is available for members with visual impairments. The FDA website is designed to adhere to WA1 AA standards and WA1 AA where possible. The text size can also be made larger.	<b>FDA</b>
Audio versions of magazine, handbook and rules are made available. Also visually impaired members receive specific communications regarding ballots and elections etc.	<b>MU</b>
Large print availability.	<b>NACO</b>
Apply design and layout standards to ensure access to members with visual impairment, including use of colour, graphics, wording, titles, etc. The new website uses a common accessible design throughout the site rather than providing text-only pages for disabled users and seeks to comply with Priority 2 of the W3C Web Content Accessibility Guidelines. Large print and Braille versions of NASUWT publications are available on request. The union provides facilities, support and adaptations for delegates with visual or hearing impairments attending training courses, seminars and conferences.	<b>NASUWT</b>
Website has text enlargement facility.	<b>NGSU</b>

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**NUJ** The website is adapted to be accessible to people with visual or hearing impairments. The NUJ is able to provide alternative formats for specific campaign materials when requested.

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**NUT** Plans are in place to produce the union's journal, *The Teacher*, on tape. Large text formats produced across all media.

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**PCS** The monthly members' magazine, *View*, is available in Braille, talking pages and large font. All other materials are available in alternative formats upon request.

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**Prospect** Supplies accessible PDFs, large plain text or audio versions of the union's magazine and publications on request. Members are able to identify their access requirements on membership system.

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**RMT** Website complies with accessibility standards.

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**UCAC** Has made larger print copies available on request but is now looking at ways of improving on this.

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**UNISON** Provides all core materials in accessible formats on request from members. Membership and activist magazines are also specifically available in audio format as a regular item to those who subscribe to a list. Union has built in procedures that enable members to request reasonable adjustments so that they can take part in campaigns, receive information in accessible formats and be part of union-wide activities ranging from meetings to demonstrations and marches.

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**Unite** Provides various publications for its members as well as general information for non-members in accessible formats. This includes application forms for Unite membership, as well as various handbooks and literature relating to specific areas of the union and its operations, and detailing the benefits and services for members. Unite has an employee who translates our materials into Braille.

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## Languages

Twenty-seven unions (56 per cent) provide some campaign and communication materials in languages other than English. This is similar to the proportion in the 2007 Audit.

**Percentage of unions offering materials in different languages**

2007	2011
53%	56%

Most of these unions provide materials either regularly or by request in Welsh (and sometimes Gaelic). The next most commonly mentioned language is Polish.

For most unions, provision is “by demand”. For example, the CWU says that publications are occasionally provided in languages relevant to the target audience, where a workplace has a significant number of workers where English is not their first language. This provision has been more aimed at campaign materials rather than regular publications.

In the largest unions, some materials are provided in different languages as a matter of course. UNISON, for example, provides recruitment materials in some 15 languages as downloadable materials from its website. It says: “These languages are selected according to recruitment priorities in consultation with staff working on the migrant workers and hidden workforce projects.”

And Unite says that “increasingly, the union is required to translate generic and organising information into a number of languages. The demand reflects the increasing number of migrant workers in our workplaces. We try to provide translated materials in the appropriate language wherever possible, for example, in one recent campaign where we had to translate the same materials into Polish, Lithuanian, Estonian and Russian. We used the Languageline, an over the telephone translation service, mainly through the union’s Migrant Worker Helpline.”

Unite adds that: “The union also has a number of organisers who are multi-lingual, including Polish, Portuguese and Spanish speakers, who help to write and translate materials as required.”

**Reflecting diversity and avoiding offence**

In addition to these activities, the majority of larger unions (80 per cent) said they took action to ensure materials indicate a diverse membership or audience and that language is accessible and does not cause offence to particular groups.

Many of the unions said they ensured that staff or outsourced organisations producing union publications were well versed in this issue, with the NASUWT saying its external service providers are contractually required to ensure that the use of images is inclusive on grounds of race or ethnicity, religion, gender, disability and age.

UNISON has a style guide on use of language and terminology which covers how to write in a simple, accessible language and avoid inappropriate language that may cause offence. All key publications and campaigns are edited according to this style guide, which is subject to ongoing consultation and review.

The NUT has recently published its own style guide with similar objectives.

Usdaw has recently revised displays in its National Conference and Training Centre to ensure that the union's black members are clearly visible. This followed a debate on the issue at a Black Members' Weekend Workshop.

## Encouraging branches

Just under half of the larger unions (46 per cent) take steps to enable or encourage branches to produce materials in accessible formats and/or represent the full diversity of their membership.

Examples of ways in which this is carried out are set out in the table below.

<b>Equity</b>	Branches were all notified and sent a copy of the Written Communications guidelines. Branches are made aware of access issues and that they may contact head office staff to provide information in a specific format where necessary.
<b>NUJ</b>	The union is in the process of issuing template materials to branches with accompanying guidance.
<b>NUT</b>	Local training is provided on communications for branches.
<b>PCS</b>	Guidelines on making materials accessible are available for all members and this is also included on the PCS website. Examples of this are Braille, large font and talking pages.

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Regional offices assist branches with production of suitable materials.

**RMT**

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The union style guide is available for use by branches. Its 'Effective Campaigning' handbook includes information on ensuring that language and images are reflective of membership; and the union has recently introduced an online print service whereby branches can develop local versions of campaign and recruitment materials using nationally designed templates and sets of images. This is to encourage a diverse imagery and high quality, readable layout. The union advises branches about the availability of service providers that can be contracted to produce documents in accessible formats. It also provides guidance to those branches who wish to and have the resources to produce such information in-house.

**UNISON**

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Branches are bound by the rules on the promotion of equality. Increasingly, the union is using the extranet to distribute template designs to officers, branches and regions which they can adapt for their own campaigning purposes. We will also help secure translation services where need be.

**Unite**

## **Impact of union campaigns**

Two in five unions said they consider or monitor the impact of planned union campaigns on the diversity of their membership. In some cases this includes considering equality or diversity impact when considering which issues to campaign on.

This includes some of the smaller unions, such as SURGE, which says that when it is planning campaigns, "the first thing we do is discuss as a senior committee the consideration for all of our diversity and speak to reps and members from each category to gain a view on the best campaigns."

Equity also says that the impact on equality is factored into all its campaign priorities, for example, its recent 'Manifesto for Theatre' campaign.

ASLEF (which is 96 per cent male) similarly pointed to its high-profile campaign to improve toilet facilities for female members.

NASUWT carries out equality impact assessments of its work and its campaigns, which are considered by the National Executive Committee to ensure that equality issues are fully embedded in its work. The union will also use its new casework

management system to identify any potential collective equality issues that should inform the development of future campaigns. Equality monitoring of certain industrial action campaigns is also undertaken.

Unite has policies specifying that equality monitoring of campaigns and membership should be carried out for all equalities groups. It says that membership or workplace information is taken into account at all stages of campaigns in order to target them effectively.

## Section F: Equality action plans and auditing

### Impact of TUC Equality Audit

Eleven unions – one in five of those participating in the Audit – said they have carried out their own equality audit since the TUC Audits started in 2003. However, this seems to be an underestimation as some unions who answered “yes” to this question in the 2007 TUC Equality Audit did not indicate that they had done their own audits in response to the 2011 one. (It is possible that some respondents were not aware of audits that occurred in the earlier period.)

The unions saying they had carried out their own equality audits in response to this TUC Audit were: BFAWU, Community, Equity, GMB, MU, napo, NASUWT, PCS, UNISON, Unite and URTU.

Community says recommendation papers from such audits are put before its National Executive Committee to further the implementation of the equality agenda. Similarly, in PCS the National Executive Committee is regularly presented with equality statistics and reports. Both PCS and BFAWU say audits were carried out in relation to their recent UMF-funded equality projects.

### Equality action plans

The 2011 TUC Equality Audit asked unions for the first time if they had an equality action plan in place. Thirteen unions (27 per cent) said they did have such plans.

These were: ASLEF, CSP, Equity, GMB, napo, NASUWT, NGSU, NUT, Prospect, TSSA, UCU, UNISON and Unite.

The following table is an edited version of comments made on how such plans are implemented or monitored:

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Each of our national committees – women, BME and LGBT set targets each year. These are evaluated at each meeting they hold.	<b>ASLEF</b>
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The CSP equality and diversity strategy is drawn up by the CSP equality and diversity group and sent to CSP Council (our executive) for approval. The strategy is produced to run alongside the CSP corporate plan. A report is given at the end of each year on progress made against each of the objectives. This is put to the CSP Equality and Diversity Group for approval and then to Council to approve. It is then posted on our website.	<b>CSP</b>
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Each equality committee formulates two-year aims and objectives which are monitored regularly and reviewed on a two-year basis. The Diversity of Union Engagement Working Party's Strategy Document to be published in 2011 will form the basis of the union's equality action plan for 2011–2012.	<b>Equity</b>
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The union's annual operational plan includes actions and commitments under equality and diversity. This is monitored by the national officers, the NEC and AGM.	<b>napo</b>
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The union has embedded the equalities review work into its day-to-day practice. It is also an integral part of the union's operational and strategic activity. The union ensures that all national committees consider equality matters and the equality implications of their work at every meeting. The union's Equal Opportunities Committee has an annual work plan which directs the equality work of the union. The National Executive undertakes an annual review of progress on equality matters in the context of the union's annual report.	<b>NASUWT</b>
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Within our strategic plan we have a section on equality. This includes developing further our advisory committees. This is reviewed every six months.	<b>NGSU</b>
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The equality action plan is monitored and implemented via the senior management structure and in consultation with the union staff group.	<b>NUT</b>
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<b>Prospect</b>	Progress on our action plan is monitored through our Equal Opportunities Advisory Committee.
<b>TSSA</b>	In early 2011, TSSA passed a new equality strategy at the Executive Committee and is working through its actions over a three-year period.
<b>UCU</b>	A single equality scheme was launched in May 2010. It is a three-year plan, implemented by the responsible national or regional committee but monitored by a sub-committee of the NEC which reports to UCU's Congress.
<b>UNISON</b>	Progress on the 35 equality action plans that make up UNISON's 2008–2011 equality scheme is measured against agreed targets by means of self-assessment during each year and reported to the centre annually.
<b>Unite</b>	Reporting, monitoring and reviewing our campaigns at the Executive Council and the National Women, BAEM, Disabled Members, LGBT and Young Members' Committees as well as regular monitoring of women and black members' involvement in regional and national committees. Also through regular phone conferences and meetings of Regional Women and Equalities Organisers and Chairs and Vice-Chairs of the equality committees.

### CSP Equality Champions

In 2009 the CSP introduced an innovative way of progressing equality and diversity issues within the union known as equality champions. Each department asks for at least two members of staff to volunteer to become equality champions. The role of the champions is to:

- lead their work on equality and provide a co-ordinated approach across the CSP
- improve links between the internal and member-related diversity work in the provision of services to all members
- contribute ideas and raise any problems concerning the equality and diversity aspects of all CSP activities that involve and affect members, staff and other stakeholders
- provide advice and support to their function colleagues on undertaking equality impact assessments on policy documents, events, publications etc
- co-ordinate their function's input into the CSP annual equality and diversity report identifying who within their function is best placed to provide an update on relevant sections to the report editor and
- contribute to raising awareness of diversity issues, and highlighting successes, at events such as the general staff meeting as appropriate.

The champions receive training on equality impact assessments to assist them in providing advice and guidance to colleagues who need to undertake EIAs on areas and projects they were involved with. The champions meet quarterly and are able to raise any concerns that staff have discussed on equality issues and to come up with suggestions of further work that the CSP can undertake to improve its services to members and support to staff.



## **NASUWT action plan**

NASUWT provided its equality action plan for the next two years, as follows:

### **Leadership**

1. Secure equalities forums or conferences across all NASUWT regions.
2. Maintain and develop the union's national equalities consultation conferences.

### **Policy and Strategy**

3. Monitor and report on the equality impact of government policy.
4. Campaign for the full implementation of the Equality Act.

### **People**

5. Train NASUWT Representatives on the casework and bargaining implications of the Equality Act.
6. Continue to develop the union's equalities information, advice and online resources.

### **Processes**

7. Secure comprehensive equalities data collection and monitoring in key areas of the union's work, including: member recruitment, conferences and events, casework, staff employment, member services.

### **Staff Needs**

8. Ensure access to training for all NASUWT staff through the implementation of the union's training and development review procedure.

### **Members' Needs**

9. Commission research into matters relating to NASUWT's organising, bargaining and campaign priorities.
10. Develop and extend NASUWT Championing Education campaign.

### **Impact Beyond the Union**

11. Continue to develop and build alliances with national and international bodies working for equality and social justice.

### **Review of Results**

12. Continue to audit the union's equalities work and impact and report regularly on progress to members or activists, staff, National Executive, National Conference and the TUC.
13. Utilise intelligence from NASUWT casework management system to support the development of equalities policy and practice.

## Part 2

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# The TUC and equality

### Introduction

The TUC gives a high priority to equality in all its activities – whether in its democratic structures, its policies, its services to affiliates or in its practices as an employer. This part of the Audit provides a summary and examples of recent activities.

### TUC Operational Plan 2011

The TUC's high level strategic goals include "to achieve greater equality in society and within unions". The pursuit of this goal is evident in some of the objectives and tasks it has set in its current operational plan.

In its work to campaign against the government's austerity measures it has set the objective of building a coalition of opposition, which includes undertaking work to highlight the impact of government measures particularly on the most vulnerable groups and to develop links with the voluntary and community sector representing these groups. It sought to ensure that the March for the Alternative on Saturday 26 March 2011 was an inclusive event with a large and representative turnout. It has also supported and built links with events and campaigns that have focused on the impact of cuts on young people, women and disabled people. It aims to continue campaigning to highlight the impact of the austerity measures on equality and to build an understanding among the public (and affiliates) of the danger of the resurgence of the far right as an outcome of government economic policies.

In terms of its organising work to build stronger unions it aims to utilise equality structures to build union strength. It will do this by supporting equality conferences and structures and through these promote events including the Pride Festival, which the TUC helps fund and has a visible presence at each year.

In the practical assistance it provides to unions, it has the objective of increasing unions' awareness of changes in equality laws, including by producing and distributing briefing materials and organising training seminars. It also aims to increase the work done on equalities in terms of union learning activities, for example, by carrying out specific projects on gender and apprentices, encouraging union action and the collection of clearer data.

Among its 'making an impact on public policy' objectives is a continued focus on influencing migration policy to ensure migrant workers have better rights.

One of the success indicators that has been set for running a successful 'new-style' Congress in Congress House in 2011, is that the proportion of women, BME, disabled and LGBT delegate numbers does not decline and that there is visibility and full participation at Congress by these groups.

## **TUC structures**

The TUC General Council structures place a strong emphasis on equality. In addition to the seats allocated to unions on the basis of size, there are a number of seats reserved to ensure that the General Council reflects the diversity of the British workforce. Unions with more than 100,000 women members must include at least one woman in their team, and there are four seats for women from small and medium sized unions. There are three seats for representatives of BME workers – one from the larger unions, one from the smaller ones and a third one for a woman. There is also a seat for a disabled trade unionists, an LGBT trade unionist, and a young trade unionist (under 27 years). These are elected by Congress as a whole. At present, over a third of General Council members are women.

The TUC organises five annual statutory conferences, one for each of the equality groups – Women, Black Workers, Disability, LGBT and Youth.

## The TUC as an employer

For many years the TUC has followed equal opportunity employment and recruitment policies and practices agreed between management and staff unions. This includes a package of support for working parents and flexible working. Managers receive equal opportunity and diversity training, with similar courses available for all staff; from 2007 onwards these have been mandatory.

The TUC periodically monitors the composition of its staff. This was last done in 2009 under the supervision of a joint management and unions equality working group. Staff were invited to tick boxes indicating their gender, age, ethnicity, sexual orientation and religion or belief, and whether they were disabled. The 2009 form also asked a range of questions about staff experiences of working at the TUC, particularly in relation to equal opportunities.

At the time the exercise was done the TUC had 334 staff and 310 responded to the questionnaire – a response rate of 90.1 per cent. In summary, the exercise showed that:

- over half of TUC staff were women (53.5 per cent).
- the TUC had an above the national average percentage of black and minority ethnic staff (16.7 per cent).
- two-fifths of respondents had caring responsibilities for children and one in ten had caring responsibilities for an adult.
- 7 per cent of staff considered themselves to have a disability although 11.6 per cent said they met the Disability Discrimination Act definition of having a disability.
- 8.2 per cent described themselves as LGB, although the same proportion also “preferred not to say” and a further question on whether staff were “out at work” revealed that most who said they were LGB in response to that question were not open about their sexual orientation at work.

In response to questions about staff experience of working at the TUC:

- Two-thirds agreed or strongly agreed that they were given fair training and development opportunities although a smaller proportion (50 per cent) agreed or strongly agreed there was fair access to promotion opportunities.
- 84 per cent agreed or strongly agreed that they have sufficient flexibility in their working patterns to deal with outside commitments and also that they are treated fairly in terms of working patterns.
- In most cases around 70 per cent-plus agreed or strongly agreed that the culture at the TUC is comfortable for all staff irrespective of personal characteristics.

## Appendix 1: Unions responding and not responding to the Audit

The following unions participated in the 2011 TUC Equality Audit. Membership figures are as at 2010 and as supplied to the TUC. If you would like to obtain copies of the questionnaires that were sent out to unions, please contact [sbrett@tuc.org.uk](mailto:sbrett@tuc.org.uk)

### Main questionnaire

Union	Membership
Accord	31,022
ASLEF	18,532
Aspect	4,161
ATL	125,778
BECTU	25,045
BFAWU	22,786
Community	67,488
CSP	36,101
CWU	217,807
EIS	60,170
Equity	36,525
FBU	43,896
FDA	17,466
GMB	601,703
MU	29,540
NASUWT	279,145
Nautilus	16,759
NGSU	13,080
NUJ	29,930
NUT	295,124
OURS	697
PCS	301,562
PFA	2,713
POA	35,972
Prospect	123,409
RMT	79,499
SoR	19,690
TSSA	28,298
UCAC	3,946
UCU	119,401
UNISON	1,374,500
Unite	1,474,564
URTU	12,250
Usdaw	386,572
WGGB	1,333

### Abbreviated questionnaire

Union	Membership
Advance	7,645
AFA	533
BACM	2,537
BOS-TU	869
BSU	3,492
HCSA	3,336
NACO	2,120
NACODS	350
napo	9,501
NASS	1,954
SURGE	1,302
Unity	4,953
YISA	1,344

The following unions did not participate in the 2011 TUC Equality Audit

Union	Membership
AEGIS	2,357
AEP	3,386
BALPA	8,400
BDA	6,540
NUM	1,695
SCP	8,888
UCATT	127,433
Total	158,699

## Appendix 2: Significant equality successes over the past four years

Unions were asked what had been their significant equality successes over the last four years. An edited version of their responses is set out here. Due to the extensive nature of some unions' responses, selected examples only have been given.

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### ASLEF

- Introduction of workplace menopause policy.
- Improvements and availability of toilet facilities for female drivers.
- Introduction of workplace HIV policy.

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### Aspect

We have overcome attempts by some local employers to provide inferior redundancy terms for staff employed on fixed-term contracts.

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### BECTU

The regular 'Move on Up' events and the annual Women's Conference are the two significant equality successes that stand out over the past four years, as these have brought in more black and more women activists to the union, and many more into membership. We are also proud that we send a delegation to all the TUC equality conferences and have made our voices heard about a number of issues, particularly around freelance workers.

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### Community

For a union that is predominantly white and male, the union has increased involvement of activists from under-represented groups since 2003.

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### CSP

- Production of the CSP equality and diversity toolkit.
- Growth of membership and activity of our three diversity networks and the web-based interactive CSP networks.
- Development of a CSP equality and diversity strategy and production of an annual progress report with clear objectives linked to the CSP corporate strategy, all of which is developed with direct member involvement.
- Introduction of staff Equality Champions in each function or department.
- Development and delivery of equality and diversity training to stewards and from that, development of training packages for them to take back to members in the workplace.

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### CWU

We have been focusing on issues with external agencies in an effort to show members from our underrepresented groups that we care about issues that are important to them. Examples of this are as follows:

- In relation to the BME communities we have worked very closely with the ACLT to drive the number of bone marrow donors up in the Black community. We have also helped to raise much needed funds for this charity.
- In addition we have worked closely with 'Just A Drop' and we can proudly say that as we write this we have commissioned the building of a watering hole in a village in Africa – this will see a school which has been closed re-open and connect nearly 500 African children with education again.
- Our union has worked closely with London Turkish Radio to ensure union issues are aired consistently on this radio station thus raising the profile of the union in this particular community.

- We have worked very closely with EAVES Poppy Project to highlight the shocking problem of illegal people trafficking mainly concerning women into the sex industry.

Engaging in these issues has shown people from all sorts of background that we are an organisation that they want to be a part of. In addition to our ability to offer individual support on industrial issues these external issues show a more humanitarian quality which is generally well received.

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Mainstreaming equality throughout the EIS structures.

**EIS**

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- Creation of a permanent Equalities Officer post.
  - Joint campaigning on equalities with the Federation of Entertainment Unions.
  - Open meetings and events for under-represented sections of the Equity membership i.e. an event at The Drum Arts Centre for minority ethnic members.
  - Delivery of Equality reps training and the training up of 45 reps.
  - Targeted training opportunities for minority ethnic members.
  - Policy works i.e. producing Access Guidelines for Branch Meetings and Written Communications Guidelines.
  - Participation in LGBT History Month.
  - Participating in the TUC Equality Conferences.
  - High-profile campaign for equal employment opportunities for older women.
  - Establishing the Diversity of Union Engagement Working Party.
  - Rule change to be put to referendum re: expelling members who breach union equality rules.
  - Gender audit of theatres and television monitoring.

**Equity**

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Our most recent successes have been the adoption of maternity, paternity and adoption provisions in the Fire Service Conditions of Service (Grey Book) and a new rule making membership or activity in a racist or fascist group an internal disciplinary offence.

**FBU**

- 
- Adoption of Equality Through Inclusion five-year strategy and a workplan.
  - Establishment of revamped governance structures at national and regional level to mainstream equality.
  - GMB has adopted a 10 per cent rule to improve the representation of equality strands attending national Congress, i.e. at least 10 per cent of the regional delegations must be made up of those equality strands that are under-represented.

**GMB**

- 
- Created equality official and youth officer roles.
  - Elected an equalities committee which has reserved seats.
  - Equalities newsletter was made available to all members and equalities section of website developed.
  - Campaigns on venue accessibility for performers and audiences and against the closure of the BBC Asian network.
  - Events and seminars tailored to equality groups created in partnership with FEU.
  - Representation of lay members at relevant TUC conferences significantly improved.

**MU**

- 
- Union Learning Fund provision reaching BME staff.
  - Regular equality and diversity training for all members.
  - Ongoing monitoring of conferences which has increased awareness and encouraged more diverse participation.

**napo**

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<b>NASUWT</b>	<p>Exceeding the union's commitments detailed in the 2007 TUC Equality Audit using the union's strategic equalities framework. For example, we:</p> <ul style="list-style-type: none"> <li>• Increased the number of Equality Officers in Local Associations and at National Conference.</li> <li>• Established an Intensive Progress Team, an organising team that works to recruit and involve teachers from under-represented groups.</li> <li>• Advanced the union's equalities work through the Union Modernisation Fund project to support overseas trained teachers.</li> <li>• Launched the union's new casework management system, which means that from 2011 onwards, the union will have sophisticated reporting functionality enabling it to monitor casework undertaken by full time and lay officials for each of the under-represented groups.</li> <li>• Refurbishment of union's conference centre to ensure accessibility criteria and standards met for staff and members.</li> <li>• Introduced new flexible working scheme for staff.</li> <li>• Increased attendance at the union's annual Consultation Conferences. This has resulted in similar events being organised at regional level and the creation of regional equalities networks.</li> <li>• Campaigned to introduce legislation to prevent members of the BNP from becoming teachers or school governors.</li> <li>• Published an Equalities Priorities booklet, which detailed the union's achievements to date and outlined the union's priorities.</li> <li>• Ensured an equalities section is now an integral part of the union's annual report.</li> </ul>
<b>NGSU</b>	<ul style="list-style-type: none"> <li>• The creation of a National Equality Officer role as an NEC position – this was passed at our National Conference in 2007.</li> <li>• We also created an Area Equality Officer role, which led to an agreement with the employer to provide Diversity Training and ensure a Diversity Video is made available to all employees.</li> <li>• It also led to agreement on an Equal Pay Audit which is currently being undertaken.</li> </ul>
<b>NUJ</b>	<ul style="list-style-type: none"> <li>• Equality reps training and increased numbers of equality reps across branches and workplace chapels.</li> <li>• Campaigns on equal pay, bullying and harassment and dignity at work, including an on-line advice session for those dealing with these issues at work.</li> <li>• Also campaigns to introduce LGBT membership monitoring and on hidden disabilities.</li> </ul>
<b>NUT</b>	<ul style="list-style-type: none"> <li>• The introduction of reserved seats on the National Executive for black or disabled and LGBT members.</li> <li>• Wider activist participation in diversity events including Education International's first Women's Conference and all TUC equality conferences.</li> </ul>
<b>PCS</b>	<ul style="list-style-type: none"> <li>• Equality over the last few years has lifted its profile as more members are beginning to form a better understanding of Equality Impact Assessments. Negotiators are now using equality in their bargaining agenda as they realise equality is a good lever to enter discussions.</li> <li>• The Tackling Under-Representation project commenced in Sept 2006. Over the past four years PCS has developed regional networks for black members and regional networks for disabled members in all nine PCS regions. Black members' regional structures are now democratic and it is envisaged that disabled members will also develop into democratic regional structures. The post has recently been made permanent as PCS recognises the importance of tackling under-representation in all PCS structures.</li> </ul>

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- PCS now collects equality data for LGBT members.
- PCS has developed a new Equality Strategy in the past year.
- The Union Modernisation Fund Equality Reps Project ran from August 2008 to August 2010. With a diversifying union membership and workforce, the UMF project was seen as important in supporting the development of the union equality representative role and tackling under-representation, particularly of women and black, asian and ethnic minorities.

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- We have continued to be successful in challenging unequal pay and have run a number of cases following the significant decisions in our own equal pay cases of Bernadette Cadman and Christine Wilson. **Prospect**
  - We have run a very successful project on Working Against Racism with an associated action plan to highlight and tackle the issues both within the union and within our members' workplaces.
  - Prospect has embarked upon another project to highlight and address the discrimination faced by disabled members.
- 

- There has been an increase in the numbers of active women and BME members over the past four years, not least as workplace reps, learning and health and safety reps. **RMT**
  - Our LGBT Advisory Committee has attained a higher profile since the introduction of LGBT reps.
- 

The merger of three equality networks into one. **SoR**

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Dealing with a rise in the far-right extremist movement. **SURGE**

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- In 2009 a dedicated Equalities and Diversity Organiser was appointed, this was made permanent in early 2011. **TSSA**
  - The stand-alone equality courses have increased representation of union activists.
  - Training on the new Equality Act has been rolled out to all organising staff and this has influenced pay claim and other employer negotiations.
  - A dedicated Equalities Strategy was put in place in 2011.
- 

- Training courses for newly qualified teachers (NQTs). **UCAC**
  - Reduced membership fee for NQTs and first full year of teaching to attract and keep young members.
  - Support for individual members with disabilities and long-term health conditions to have reasonable adjustments within the workplace/working day.
  - Attendance at our National Conference by numerous charities e.g. Stonewall; ChangingfacesCymru; Mind. A fringe event by MIND dealing with mental health issues during our Conference in 2009.
  - Unanimous endorsement of the General Council of the General Secretary who is known to have epilepsy. The new General Secretary reports there has been no prejudice or doubts about her ability fulfil the demands of the role.
- 

- Equal Pay: Keeping equal pay high on the political and bargaining agenda; and raising awareness of the gender pay gap. **UNISON**
- Raising awareness of the Public Sector Equality Duties and use of Equality Impact Assessments. The Equality Act 2010 is also a significant success in being enacted in a negative climate of recession and economic downturn.

- A key part of the union work over the last four years is its race and community cohesion work, promoting and building safer communities and promoting a better deal for young workers.
- Challenging Racism in the Workplace is UNISON's key strand of work on race equality. Launched in late 2007, the project aimed to raise race equality as a critical priority for branches, provide the tools for supporting change at branch and workplace level and boost confidence of activists, negotiators and organisers to challenge and address the effects of institutional racism.
- In 2010, Challenging Racism was seen as a critical part of UNISON's mainstream 'defending public services' campaign. New materials and resources have been produced to integrate race equality into branches' negotiating, campaigning and organising activities around cuts.
- On our disability agenda we have continued to influence government proposals on matters including welfare reform, the future funding of and eligibility to the DWP's 'Access to Work' scheme and plans for the delivery of social care.
- The women's self-organised group identified a need to raise political awareness among women members, and to encourage their participation at all levels in the political sphere. To this end a project "Don't do politics" was developed. This project is now being rolled out across the union, extended to all self organised groups and to the wider union membership.
- The priority for LGBT equality has been to increase recruitment of LGBT workers and mainstream LGBT equality on the bargaining agenda, lobbying for and raising awareness of new rights and duties under the Equality Act 2010.
- Young members have continued to press for the end of the discriminatory age bands in the national minimum wage, inclusion of apprentices within scope of the legislation, and for the level of the minimum wage to be raised to that of a living wage.

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#### Unite

- Have been providing Equality Act 2010 briefings for all officers and reps nationally and in all regions.
- Provided training on equality issues in relation to sexual orientation and religion or belief for all officers and reps.
- Wide range of equality campaigns arising out of motions to the national and regional equalities conferences as well as Unite policy conference.

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#### URTU

Diversity and equality training of lay reps.





**Trades Union Congress**

Congress House  
Great Russell Street  
London WC1B 3LS  
[www.tuc.org.uk](http://www.tuc.org.uk)

September 2011  
ISBN 978 1 85006 916 4

£8 TUC member unions