Integration in the workplace: emerging employment practice on age, sexual orientation and religion or belief

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**Equality and
Human Rights**
Commission

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Executive summary

This report outlines findings from research carried out for the Equality and Human Rights Commission by the Employment Research Institute (ERI) at Edinburgh Napier University and the Comparative Organisation and Equality Research Centre (COERC) at London Metropolitan University. The report examines good practice in relation to recruitment, promotion or advancement at work based on the three equality strands of age, sexual orientation and religion or belief.[1]

The research evidence will form the basis of a good practice document on recruitment, promotion and advancement at work to be developed by the Commission.

Methodology

The methodology for this project involved two stages. Firstly, a desk-based review was carried out which identified good practice in integrating employees in the workplace, with particular reference to age, religion or belief and sexual orientation.

Secondly, case studies were carried out within eight organisations between February and April 2009. Organisations were purposefully selected in order to obtain those that are exemplars of good practice across one or more of the three equality strands. Additionally, a diverse range of organisations were selected from different industrial sectors, from public, private and voluntary sectors and from different parts of Great Britain, including Scotland and Wales.

Good practice literature review

The last 10 years has seen a wave of new and amended equalities legislation being introduced as well as the establishment of the Equality and Human Rights Commission bringing together the three former equality commissions covering gender, race and disability. At the same time, there has been a growing awareness of the business case for having a diverse workforce. These factors have increasingly compelled employers to consider equalities within their workplaces.

In terms of good practice in relation to the equality strands of age, religion or belief and sexual orientation, Employers Forum on Age, The Age and Employment

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[1] The focus on sexual orientation means that where appropriate reference is made to lesbian, gay and bisexual (LGB) people. However, many organisations have adopted policies and established groups that are inclusive of lesbian, gay, bisexual and transgender people (LGBT), and the term LGBT will be used, where relevant, to refer to such policies or groups.

Network, Age Positive, Stonewall, the Chartered Institute of Personnel and Development, Acas, the Trades Union Congress and the Equality and Human Rights Commission are some of the key forums that are engaged in disseminating current good practice. However, good practice is generally less well developed around the equality strands of age, sexual orientation and, particularly religion or belief, than gender, race and disability.

Structure and culture

Drawing on the research carried out within the eight case study organisations, this section examines two sides of the same coin, namely (a) key formal structures and policies that form the framework by which organisations address and develop their equalities agendas, and (b) organisational culture and culture change management.

Having formal structures to support and promote the diversity and equality agenda appears to be important in the case study organisations. In particular, having dedicated diversity and equality specialists with particular expertise who could look at issues across the organisation was a core part of organisational equality strategies. Also, a senior level equalities strategy committee was important in all the organisations for making decisions at the strategic level. Other support mechanisms could also play a key role, in particular the practice of having Diversity Champions. Having formal written policies on a range of specific equality areas was also popular.

Traditionally, diversity specialists were based with the human resource (HR) function (Kirton and Greene, 2009) but in five case studies, the diversity function was external to HR or semi-autonomous from it. The reasons for having specialist equality and diversity units outwith HR included: being able to consider equality issues that affect both staff and the customer / client group; being able to drive forward cultural change in the organisation more effectively; and having a higher visibility within the organisation. Diversity specialists who were located within the HR or people function did not see their remit as being restricted to employment issues. Equality and diversity was seen as an issue that goes across the whole organisation and was not limited to employment.

However, some considerations around the location and role of diversity and equality specialists emerged; in particular, whether these specialists should be part of the HR function or be located in some other area of the organisation (such as the Chief Executive or equivalent's office). Maintaining a close and effective relationship between HR and independent or quasi-autonomous units is very important. There was also some 'grey areas' around how responsibilities were divided between the two. For example, grievance procedures were generally owned by HR, but where the

grievance related to an equality issue, the diversity and equality units had greater expertise. Given the relatively recent emergence of separate diversity units (in most cases), these issues were still being worked out by organisations.

A key aim of diversity and equality units / staff was to affect cultural change throughout the organisation with the aim of embedding a culture of understanding, awareness and continual improvement in equality and diversity. However, this was not without its challenges. There were different equality and diversity cultures within organisations, with some areas more receptive to the message than others. Low staff turnover could affect the pace of culture change since a greater resistance to change was identified among some longer serving staff.

Contexts and factors affecting policy development

Organisations varied in their approaches to equalities generally, and to the specific strands of age, religion or belief and sexual orientation. They also differed in the level of development of policy and practice across and between equalities strands. Some organisations had better developed policies in relation to some equality strands than others and a small number had fairly well developed policies across all three strands. The research carried out within the eight case study organisations showed that the variety of responses to the equality issues displayed could be attributed to a number of key differences between the organisations.

There were important differences between organisations based in different sectors. External factors particular to each sector, such as audits, inspections and public enquiries, as well as legislation, were sometimes the stimulus for developing the equalities agenda. Some sectors were particularly focused on the 'service case', while in the private sector, the primary factor was the business case. However, irrespective of the initial impetus, all organisations had gone beyond the legally required minimum and embraced a wide range of reasons to develop the equalities agenda further.

Other factors that made a difference to the equality policies and practices adopted included regional differences. Regional variations in the distribution of some equalities groups and dispersion of populations can potentially make a significant difference to the development of equalities policies. While national level organisations may have standardised policies that apply across employees in different locations, they also tried to be responsive to local needs.

A smaller workforce and / or a smaller number of equalities groups (particularly with regard to lesbian, gay, bisexual and transgender (LGBT) issues or religion or belief

issues) may mean that there are simply too few individuals to make some policies practical, for instance setting up a specific equality network. Where staff are widely dispersed between different (and particularly small) sites, there are also implications for the organisation in terms of making some facilities, such as quiet rooms, available. Electronic communication methods and conferences for staff forums were two potential solutions used by some case study organisations.

All the organisations perceived the interface with clients as an important motivation for moving forward the equalities agenda. For instance, consultation with community groups could feed into recruitment policies.

All organisations were involved in some form of benchmarking activities. This was an important activity that helped organisations develop and learn how to implement policies and share good practice. Types of benchmarking included: at a national level across organisations, for example national forums such as Stonewall, Employers Forum on Age, Employers Forum on Belief, etc.; between organisations in the same industry (for example industry bodies); and between different organisations within the same local area.

Views on the influence of trade unions within organisations differed but on the whole, the main impetus for driving equalities agendas was thought to come from within the organisation itself rather than primarily from union involvement. However, it was agreed that unions were consulted on equalities policy at various levels. A union view, however, was that too often unions were not sufficiently consulted or were given insufficient time for consultation on equality measures such as monitoring which could be done more effectively following management and trade union agreement.

Practices

This chapter examines the particular practices adopted by case study organisations in order to implement their equality and diversity policies. The practices include: communication and raising awareness; management support; staff equality networks; monitoring and reviewing workplace policy and practice; recruitment and retention; training and development; flexible working and facilities; challenging discrimination and harassment; retirement and pensions; and company performance.

Communication and raising awareness

A number of different methods were used to communicate equalities and other issues to staff. These varied according to the nature and size of the organisation. although electronic methods were generally widely used. Particular activities were

also carried out in order to raise awareness of either equalities generally and / or specific equality strands in particular, such as producing advice booklets.

Management support
Management support in various forms was considered an important factor in the support, promotion and implementation of equality and diversity policies.

Support from senior managers (and in particular the Chief Executive, or equivalent) was vital in order to set up and resource the structures that can take forward the equalities agenda, although, the commitment of particular individuals could sometimes make all the difference to how, and the extent to which, the agenda is pursued. Senior managers could also have an important role to play as role models to other staff. So, for instance, openly lesbian, gay or bisexual (LGB) staff at a senior level are perceived to make it more acceptable for staff throughout the organisation to be 'out'.

A number of employees stressed the importance of line managers in turning equality policy into practice. Line managers needed to be aware of equality issues and how these apply to staff, teams and departments that they managed. Therefore, it is important to support line managers in their role through communication and training of policies and practices.

Some organisations operated a system of diversity champions who were generally drawn from senior management level. Their role was to 'champion' a particular equality strand in order to raise awareness of that strand. These roles were strategic, so champions would aim to affect policy and practice through representing issues relating the particular equality strand at senior level. The role of the champion was also affected by the interest, commitment and resources of the individual appointed. This means that in many organisations not all the equality strands would have champions.

Staff equality networks
Several organisations operated staff equality networks. Separate networks existed for disabled, LGBT, women, race and ethnic minority, interfaith, different faiths, disability and younger workers. The purpose of the networks varied between organisations and between networks, but included: providing support for staff, increasing understanding of issues and contributing to the diversity agenda in relation to the particular equality strand. On the whole, staff networks tended to focus on the staff support element but sometimes also provided a forum that represented the views of the equality group which could feed into strategy and policy development.

There were variations between staff networks in how they operated depending on the equality strand with which they were concerned. Some networks experienced greater difficulties in operating, and consequently were less commonly found, such as interfaith and religious based groups. No staff networks for older workers operated within the case study organisations. Most common were LGBT staff networks which were considered a key indicator of an organisation's willingness to be inclusive of LGBT staff. These networks faced a number of challenges, such as dealing with confidentiality of membership and attracting a wider range and greater number of members, but had resulted in some positive outcomes for staff (at least anecdotally), such as LGBT employees gaining the confidence to come out more widely in organisations.

Monitoring and reviewing workplace policy and practice
Throughout the case study organisations, equality and diversity issues were monitored using standard methods such as equal opportunities forms at recruitment stage, internal benchmarking, staff surveys, exit surveys and progress reviews. Organisations used categories as defined by the Census or by a recognised authority on benchmarking, such as those provided by the Employers Forum on Age, Employers Forum on Belief, Stonewall and so on, in order to: achieve consistency with other employers and government statistics; be able to benchmark; and use a common language.

Recruitment and retention
Equality and diversity policies and practices were identified as key in recruitment and retention in a number of ways. For example, respondents suggested that information on these, as well as on equality employee network groups, on the organisation's website and / or in induction packs sent them a very positive and inclusive signal encouraging them to apply to work for the organisation. This had indicated to them that their religion or belief and / or sexual orientation would be welcome in the organisation.

Levels of retention varied between the organisations. This is expected as they are drawn from a diverse range of sectors, for example the retail sector is known to have far higher rates of turnover than sections of the public sector.

The monitoring of staff recruitment by equality group was carried out by all organisations because they wanted the make-up of their staff to reflect the diversity of the population as a whole and the local communities in which they were based.

Training and development
Some organisations had established positive action training for under-represented groups. The uptake of learning and development was beginning to be monitored across the new strands, particularly by age group, to ensure that employees had access to continuous professional development. Promotion by equalities group was monitored by some of the organisations (and others had plans to introduce monitoring in the future). Training for staff on equalities was also carried out, particularly as part of the induction process.

Flexible working and facilities
Flexible working can be an important way in which the needs of different equality groups can be met. For instance, part-time and flexible working can be particularly attractive to older workers who no longer wish to work full-time or have caring responsibilities. Flexibility to take time off at a time of an individual's choosing can help them fulfil religious obligations and attend religious festivals. All of the case study organisations that took part in the research had a range of flexible working practices in place. In addition to flexible working practices, a number of organisations have provisions which take account of some of the needs of the new strands. This included providing facilities for prayers (for example quiet rooms) and providing Halal meat, kosher food and vegetarian options in staff / public canteens.

Challenging discrimination and harassment
Organisations recognised the importance of including and stating 'age, religion or belief and sexual orientation' alongside other grounds in their grievance, disciplinary, bullying and harassment policy, procedure and training. It was important to raise awareness of discriminatory attitudes and behaviour in respect of these grounds and create a 'zero tolerance' culture for these strands in addition to the others within the workplace.

Retirement and pensions
The provision of retirement options and pensions in some of the organisations meant that many older workers felt supported in work as they neared retirement. The Communications service provider, Library and the retailer all had schemes which facilitated being able to accommodate and offer employees flexible retirement options.

Company performance
For private sector organisations, there was a clear association between strong diversity policies and attracting and maintaining staff and customers. For those organisations in the public and voluntary sectors there was a strong obligation as

service providers to demonstrate they were a diverse organisation. Making the equality strategy integral to other initiatives in the organisation can help to ensure that these issues have a high profile and are more likely to result in action. However, actual evidence of the impact of equalities on company performance was limited.

Conclusion

This research has identified that organisational responses to the issues of age, sexual orientation and religion or belief vary, depending on a range of contexts and factors. There is no one approach or policy that will be appropriate for all organisations. While this research identified a range of good practice, it is also the case that some of the good practice in employment in relation to these three strands is still emerging and developing. Moreover, there is variation across the organisations in the level of support and provision in relation to these equality strands. This research has identified some of these emerging good practices that could be adopted within other organisations.

1. Introduction and methodology

1.1 Background

In November 2008, the Equality and Human Rights Commission commissioned the Employment Research Institute (ERI) at Edinburgh Napier University, in partnership with the Comparative Organisation and Equality Research Centre (COERC) at London Metropolitan University, to examine good practice in relation to recruitment, promotion or advancement at work based on equalities. The project particularly focused on the three equality strands of age, sexual orientation and religion or belief. The focus on sexual orientation means that where appropriate reference is made to lesbian, gay and bisexual (LGB) people. However, many organisations have adopted policies and established groups that are inclusive of lesbian, gay, bisexual and transgender people (LGBT), and the term LGBT will be used, where relevant, to refer to such policies or groups. The research evidence will form the basis of a good practice document on recruitment, promotion and advancement at work to be developed by the Commission.

1.2 Methodology

The methodology for this project involved two stages. The first stage consisted of a desk-based review of good practice and the second of case study research in eight diverse organisations.

Review of organisational good practice

Existing published material highlighting good practice in integrating employees in the workplace, with particular reference to age, religion or belief and sexual orientation, was reviewed. Most information was available via internet sources and a wide range of websites were searched to identify appropriate material. This stage also involved identifying potential good practice organisations which might be selected for the case study research.

Case study research

Case studies were undertaken within eight organisations with fieldwork being carried out between February and April 2009. Organisations were purposely selected in order to obtain a diverse range. The original selection criteria were that:

a)   Both large organisations and small and medium-sized (SME) companies should be included.

b)   Case studies should be drawn from different industrial sectors.

c) The public, private and voluntary sectors should all be represented.

d) Case studies should be drawn from different parts of Great Britain, with at least one being in Scotland and one in Wales.

e) Case studies should have a diverse workforce, including relatively high proportions of employees from at least one of the equality strands of age, sexual orientation and religion or belief.

f) Case studies should be an exemplar of good practice in either age, religion or belief, or sexual orientation, or a mixture of the three.

A list of potential case studies was drawn up based on findings from the review of good practice. Good practice organisations were identified through a range of sources, including: published good practice case studies and membership of an equality forum such as Stonewall, Employers Forum on Age, Age Positive, Employers Forum on Belief, Opportunity Now, Diversity Excellence and Diversity Works. Organisations were then selected (in conjunction with the Equality and Human Rights Commission) to represent the criteria above. One issue that emerged was that it was not possible to identify the diversity of the workforce at this stage for most organisations, therefore this was not included in the final selection criteria.

In practice, it proved difficult to recruit eight organisations to meet all the requirements outlined above. Although a number of SMEs were contacted, none were able to take part in the study at the time the fieldwork was being carried out. Therefore, all the organisations taking part were technically classed as 'large'. However, all other criteria were fulfilled in the selection of the final eight organisations which took part in the research.

Varying levels of access were available within the organisations. In all cases, the human resource and / or diversity representative was interviewed using a semi-structured interview schedule. Other interviewees varied depending on availability and access within each organisation, but where available, semi-structured interviews or focus groups were carried out with the following:

*   Equality Champions
*   Employees
*   Line managers
*   Trade union representatives

Tables 1.1 and 1.2 outline the key features of participating organisations and the individuals interviewed for each.

Name	Sector	Location (Head Office)	Employees	Good practice in:
Table 1.1 Profile of case study organisations				
Children's charity	Voluntary	National (London)	6,000 employees and 11,000 volunteer staff	Sexual orientation
Housing company	Private	North East England	1,767 staff in group mostly in a housing management company (688) and a construction company (679)	Sexual orientation
Retail company (large)	Private	National (Leeds)	160,000 employed in the UK	Age, religion or belief
Library		London and Yorkshire	2,200 (split evenly between the two sites)	Age, religion or belief
Local Authority	Public	London	10,500 (around 4,800 based in schools)	Age, sexual orientation and religion or belief
Police	Public	Wales	2,500	Sexual orientation
Communications service provider	Private	National (London)	86,500 employed in the UK	Age, sexual orientation and religion or belief
University	Public	Scotland	5,700	Sexual orientation and religion or belief

Table 1.2   Case study interviewees

Name	Participants
Children's charity	Semi-structured interviews were carried out with: • Director of Policy and Research • Equalities Officer • Interfaith staff representative • Sexual orientation staff representative
Housing company	Semi-structured interviews were carried out with: • Lead Officer for Equality and Diversity • Equality and Diversity Coordinator • Head of People Management Focus groups were carried out with: • LGB Staff Network Group (4 participants) • Line managers and Team leaders (4 participants) • Inter Faith Staff Network Group (3 participants)
Retail company (large)	Semi-structured interviews were carried out with: • Colleague Relations Team Leader • People Manager • Store manager • Individual interviews with eight employees
Library	Semi-structured interviews were carried out with: • Policy and Diversity Manager
Local Authority	Focus groups were carried out with: • Service Head Scrutiny and Equality • Diversity and Equality Co-ordinator for Race and Sexual Orientation • Diversity and Equality Co-ordinator for Age and Disability • Diversity and Equality Co-ordinator for Faith and Gender
Police	Semi-structured interviews were carried out with: • Diversity Unit - Manager • Diversity Unit – External Issues • Diversity Unit – Internal Issues • LGB Champion • Police Authority representative • Gay Police Association Chair • People Services Group – HR Advisor • Volunteer Cadets Scheme Organiser
Communications service provider	Semi-structured interviews were carried out with: • Head of People Practices (lead on age, religion or belief and sexual orientation) • Line manager • Trade union representative Age • Founding chair of Apprentice Network • One of first people to continue working after company abolished fixed retirement age in 2005. • Manager focused on inclusive design and accessibility for older and disabled customers Religion or belief • Chair of Christian network group

	• Acting Chair of Muslim network group • HR and Member of Muslim network group Sexual orientation • Woman Co-Chair of LGBT network group • Man Co-Chair of LGBT network group
University	Semi-structured interviews were carried out with: • Equality and Diversity Unit, Director • Religion or Belief Champion • Sexual Orientation Champion • LGBT Network Chair

1.3   Structure of the report

Chapter 2 examines existing evidence on good practice in relation to age, sexual orientation and religion or belief. Chapter 3 examines the formal structures and policies in place within the case study organisations that support equalities generally, and where appropriate, specific equalities (age, sexual orientation and religion or belief) in particular. Chapter 4 assesses the contexts and factors affecting policy development and identifies reasons for the emerging equality agendas in organisations and the role of legislation and external audits and inspections. This chapter also examines the range of different factors that contribute to how equality policies have developed in different organisations. Chapter 5 examines the various practices which are pursued within the organisations in order to support the equality agendas. Chapter 6 outlines the conclusions and the research implications of the study.

2. Good practice literature review

2.1 Introduction

There are two key reasons why employers are increasingly compelled to consider issues of equalities within their workplace. The first (and arguably the most compelling reason) has been the legal framework.

The last 10 years has seen a raft of new and amended equalities legislation being introduced in order to supplement the Sex Discrimination Act 1975, the Race Relations Act 1976 and the Disability Discrimination Act 1995. In 2006, the Equality Act established the Commission for Equality and Human Rights (renamed the Equality and Human Rights Commission when it began operations in 2007) bringing together the three former equality commissions covering gender, race and disability. In addition, this and other acts (Race Relations Amendment Act 2000, Disability Discrimination Amendment Act 2005) established a positive duty on public sector bodies to promote equality of opportunity and eliminate discrimination based on gender, race and disability.

In 2003, discrimination legislation was extended to cover sexual orientation and religion or belief in the Employment Equality (Sexual Orientation) Regulations and Employment Equality (Religion or Belief) Regulation (Department of Trade and Industry (DTI), 2003). In 2006, age discrimination legislation was introduced with the Employment Equality (Age) Regulations. The proposed Equality Bill sets out to streamline and harmonise the existing array of equalities legislation, and will also extend the pubic sector duty to include sexual orientation, religion or belief and age (Government Equalities Office, 2009).

The second reason for employers to pay attention to issues around equalities in the workplace has been an increasing awareness of the business case. This embraces issues from recruitment and retention to meeting customer needs and ultimately service provision and / or profits. The emergence of Diversity Management in the 2000s reflects the growing emphasis on the business case for equalities in an organisational context as opposed to the rights-based approach of 'equal opportunities' which it has largely succeeded (Kirton and Greene, 2009).

There is a good deal of literature proclaiming how organisations can adopt good practice in relation to equalities generally, and particularly in relation to gender, race and disability. For example, see Acas (2005b); Audit Commission (2002); Big Lottery Fund (2008); Business in the Community (2008); Chartered Institute of Personnel and Development (CIPD) (2005, 2006, 2007); Federation of Small Businesses

(2007); Diversity Works for London (2009); Trades Union Congress (TUC) (2006a, 2006b, 2006c, 2006d, 2007). This is, at least in part, because these three equality strands have been longer established in the legal framework as well as being promoted separately for some time through dedicated separate commissions (prior to the establishment of the Equality and Human Rights Commission). For instance, Business in the Community, Opportunity Now. Arguably, good workplace practice around the equality strands of sexual orientation, religion or belief and age is less developed, although expertise does exist and some organisations are disseminating what is already known and seeking new evidence (for example Stonewall, the Employers Forum on Age (EFA) and The Age and Employment Network (TAEN)).

The remainder of this section reviews current literature relating to good practice for the three equality strands of age, sexual orientation, and religion or belief.

2.2   Age

In the UK in October 2006, as part of the UK government's obligation under the EC Directive on Equal Treatment in Employment and Occupation, age discrimination legislation was introduced to the UK. This legislation prohibits discrimination in recruitment, training and promotion, sets a default retirement age of 65, with a right of employees to request working beyond that, and extends protection against unfair dismissal beyond the age of 65 (see www.dti.gov.uk/er/equality/age.htm). However, this legislation does not include discrimination in relation to goods or services.

Age discrimination is not limited to any one age group, it can affect individuals at all stages of their working life and the age discrimination legislation applies to all age groups. However, it is of particular relevance to older people due to the increased discrimination they face. There are currently around 20 million people aged 50 or over in the UK and this is predicted to increase to 27 million by 2030 (Office of National Statistics, 2005). The ageing of the workforce, increased life expectancy and pension shortfall mean that older people will be working longer and will form an increasing proportion of the workforce in the future.

Age discrimination is most common in the recruitment and selection stage. Some of the barriers facing older people at this stage are advertisements asking for school leavers / graduates or those with limited experience, application forms which ask for date of birth and employment history. The number of people claiming to have faced discrimination at work because of their age has more than tripled in a year, according to official statistics. Figures released by the Tribunal Service show that claims rose from 962 in 2006 to 2,940 in 2007.

The discrimination that older workers face can be linked to a number of misconceptions employers have about older workers. In particular, that older workers are: over-qualified and too experienced; winding down; more likely to be off sick; are unable to learn new skills; and do not need any further development or career progression. However, older workers have been found to be associated with: high retention rates; lower absenteeism and reliability. They have also been found to be flexible workers with highly developed people orientated skills and to be as capable as younger people at learning and retaining new skills (Department for Work and Pensions (DWP), 2008). Similarly, it is often assumed that younger people lack the skills or experience. A strong business case for employing older workers is often put forward. However, the business case for older and younger workers may not be so strong in the context of rising unemployment and possible redundancies.

Good practice in the employment of older workers
There are a number of organisations / networks involved in promoting good practice in the employment of older workers; these include EFA, TAEN, Age Positive, the Chartered Institute of Personnel and Development (CIPD) and the Advisory, Conciliation and Arbitration Service (Acas).

Acas (see Acas, 2006) recommends that employers should: word job adverts carefully to avoid language that might put off older workers; avoid stereotyping older people; train managers and personnel staff about age diversity - for example, by challenging some of the preconceptions managers may have about employing older workers; use age profiling to support awareness of age issues; and maintain an effective working relationship with older workers by focusing on training, career planning and performance appraisal. Acas also suggests that employers be more creative around defining career progression and promotion of older workers for example by offering: more open job descriptions with a wider variety of tasks; sideways moves to other jobs; mentoring roles to develop junior colleagues. Although Acas suggests that older workers should be offered greater choice and flexibility at work, other employees, who are not offered these benefits, may view this as discriminatory.

EFA is a campaigning organisation made up of a network of leading employers. Their website provides details of the latest employer policies leading employers have adopted to comply with age discrimination laws (a large number of employers are listed along with case studies). The EFA is not solely focused on older workers but rather aims to present a clear social justice case for equality and promotes good practice among employers. They do not promote positive discrimination in favour of

older workers. For example, EFA (2008) raises the issue of generation mismatch in the workplace in particular how to attract and integrate younger workers.

The Age Positive website (part of the DWP) offers a number of guides on managing an ageing workforce across a number of industry sectors. These guides are aimed at employers and cover key issues in relation to age discrimination, recruitment and selection, promotion, management, pay and conditions and retirement. They have a large number of case study employers included on their website. DWP (2008) provides a guide for all aspects of employing older workers. This guide covers all areas of employment including recruitment and retention, flexible working, benefits and pay, training and development, redundancy, retirement and workforce management. The guide aims to illustrate the benefits of having an age diverse workforce where the skills and experience of all age groups are harnessed for the benefit of the organisation. Although the focus is primarily on older workers, the benefits to younger workers of working in an age diverse workplace are outlined.

CIPD (2008a) aims to help employers and trade unions understand how to develop good practice to meet the requirements of the age discrimination regulations which were introduced in October 2006. The guide complements guidance on the new regulations provided by the DTI and Acas.

Taking a broader approach to the issue of age in the workplace CIPD (2008b) examines the issue of generational diversity. This document focuses on the interaction between four generations in the workplace - veterans (those born between 1939 and 1947); baby-boomers (those born between 1948 and 1963); generation x (those born between 1964 and 1978); and generation y (those born between 1979 and 1991) - and how they bring together divergent skills, learning styles and expectations. It is argued that there are opportunities to harness the skills and performance of each generation yet few organisations are responding to the opportunities offered by generational diversity.

TAEN is an independent charity and campaigning organisation that works with the media, employers and government to change attitudes and public policies on older workers. TAEN was established in 1998 and was formerly known as Third Age Employment Network; it is supported by Help the Aged. TAEN offers a wide range of publications across the issue of age in the workplace. The term 'age management' is being more widely used in relation to good practice in the employment of older workers. TAEN (2007) argues that age management as a body of knowledge and practice is potentially valuable and transferable in business. TAEN states that age management involves:

> ... understanding the business needs of the organisation, devising suitable, fit for purpose interventions, carefully preparing the ground in terms of having the necessary support of stakeholders and implementing them in the same way as one would implement any change programme, so as to maximise prospects of success.

Taylor (2006) suggests that the implementation of policies on age management is more likely when HR departments and line managers are made responsible for achieving age management objectives in the form of key performance indicators. He also states that success depends on the participation of the workforce so that everyone understands the process. Communication and awareness raising and agreement between trade unions and management are also important.

Flexible working is increasingly seen as a way of attracting and retaining greater numbers of older workers in the workplace (Loretto et al, 2005). Indeed research suggests opportunities for flexible employment are highly rated by many older workers (Smeaton and McKay, 2003; Loretto and White, 2006). There are several types of flexible working that benefit older workers including flexitime, job sharing, compressed hours, part-time hours, seasonal work and home-working. Such types of working give older workers the opportunity for flexible retirement or to combine work with caring commitments. This is also supported by legislation. Since April 2007, UK legislation on flexible working has been extended to allow carers of adults the right to request flexible working, with a duty on employers to consider such requests seriously and only reject them for good business reasons.

Although there are extensive examples of good practice on age, there is a tendency solely to focus on age at the exclusion of other equalities groups and the various documents fail to address how gender and religion impact on ageing in the workplace. This is an issue that can be directed at other good practice guides as well. Furthermore, TAEN states that if there was a way of classifying interventions, for example whether they refer to recruitment, training, or promotion, it might make it easier to pass on the experience to others. Taylor (2006) argues that in order to achieve good practice in age management, policies do not need to be labelled as 'older worker' policies. Rather an employer needs to provide a workplace environment in which all workers are treated fairly and are able to fulfil their potential regardless of age. Taylor (2006) states that experience in gender diversity and multi-ethnic team development is a potential source of age management competence.

A number of key recommendations based on the good practice guides published by these organisations can be identified. These are summarised in Appendix A.

2.3 Sexual orientation

From 2 December 2003, when the Employment Equality (Sexual Orientation) Regulations came into force, it became unlawful to discriminate against workers because of sexual orientation. The regulations also cover providers of vocational training.

Sexual orientation is defined as: an orientation towards persons of the same sex (this covers gay men and lesbians); the opposite sex (this covers heterosexual men and women); or both sexes (this covers bisexual men and women) (Department for Trade and Industry, 2003: 1). Transgender is not covered under this legislation, although it is partially covered under sex discrimination legislation and is included in the Equalities Bill, which proposes to unify the current equalities legislation (Government Equalities Office, 2009).

There are no accurate figures for the numbers of lesbian, gay and bisexual (LGB) people living in the UK, although estimates suggest there are around 6 per cent, or roughly 3.6 million people, of whom 1.7 million are in the UK workforce (Stonewall, 2007a). The official position of the Office for National Statistics (ONS) and the General Register Office for Scotland remains that the 2010 Census for England, Wales and Scotland will not include a question on sexual orientation / sexual identity. Instead a question on sexual identity will be asked in the new Integrated Household Study which will give a partial estimate of the LGB population. The National Survey of Sexual Attitudes and Lifestyles is considering including a question on sexual identity in 2010. This lack of official data means this equality group may be less 'visible' to employers as employees, service users and customers than the other five equality groups covered by the equality legislation.

Research on the experience of LGB people in the workplace is limited. However, a survey of 10,321 LGB people in 2001 found that 28 per cent of LGB people surveyed had experienced discrimination at work (IDS Research, 2002). A more recent survey of 1,721 LGB people on hate crime found that one in 10 were a victim of an incident committed by a work colleague (Stonewall, 2008). Qualitative research also suggests LGB people face discrimination in the workplace. For instance, Colgan et al (2006) found that 18 per cent of LGB employees they interviewed had experienced discrimination and 23 per cent had experienced harassment. Sectoral studies support this for example, LGB staff in Higher Education Institutions (HEI) reported significant levels of negative treatment on the grounds of their sexual orientation from colleagues (34 per cent), students (19 per cent), and those who work in other areas of their HEI (25 per cent) (Equality Challenge Unit, 2009). In a survey of university teachers reported in Stonewall (2007a), a higher proportion of lesbians (41 per cent)

reported harassment compared with gay men (27 per cent). None of the lesbians who reported harassment reported that action was taken in consequence.

A review of pay gaps across equality strands found that the evidence of the effects of sexual orientation on pay to be severely limited. What evidence existed suggested that gay men and lesbians may earn more then heterosexual men and women, although once their characteristics are taken into account, gay men may actually be disadvantaged (Metcalf, 2009). Longhi and Platt (2008) also found that women and men in same sex couples did not experience a pay gap relative to married men.

As a consequence of perceived discrimination and harassment, LGB people may decide not to disclose their sexual orientation or be 'out' at work. In a Higher Education European Social Funded study of 16 'good practice' employers across the public, private and voluntary sectors, only 58 per cent of LGB participants said they were 'out' to everybody at work (Colgan et al, 2006). Stonewall's report on lesbians in the workplace (2008) found that many felt that their experience of the workplace was shaped more by being a women, as their identity as a lesbian could be hidden if they wished in order to avoid facing what some perceived as the potential for 'double discrimination.' In addition to differences by gender, research on sexual orientation has recognised the need to consider the specific experiences of LGB people taking account of qualifications and occupation, disability and race / ethnicity (Safra Project, 2003; DWP, 2003; Ryan-Flood, 2004; Keogh et al, 2004).

Working in an 'LGB friendly environment' has been shown to have a positive impact on LGB workers who are more likely to be 'out' at work. It fosters openness and confidence, improved work productivity and effectiveness as well as loyalty and pride in the organisation (Colgan et al, 2006; Guasp and Balfour, 2008). Conversely, perceptions of a homophobic working environment, experience of harassment and an inability to come 'out' were identified as a source of stress, exclusion and contributing reasons for leaving an employer (Colgan et al, 2006).

Employers thus need to ensure policies, procedures, terms and conditions comply with equality law. In addition, research has shown that sexual orientation issues at work tend to be concerned with the need to challenge prejudice and discrimination in relation to LGB people at work and to deal with the inappropriate behaviour, harassment and victimisation from colleagues and managers that may result (Denvir et al, 2007). Also, managers and trainers may be less comfortable in dealing with sexual orientation than other equality issues because sexual orientation issues are still viewed as more controversial (Dickens et al, 2009). However, for LGB workers, the extent to which homophobia is accepted or challenged within the workplace is a

key indicator of inclusion. LGB respondents have expressed concerns that too often organisations rely on LGB people to 'whistleblow' before tackling problems. The introduction of the Employment Equality (SO) Regulations has meant that LGB employees are more likely to take a grievance if a problem arises at work on grounds of sexual orientation (Colgan et al, 2006).

There are a number of guides for employees and employers on sexual orientation in employment. A number of these identify key legislative requirements, how to operate these and some suggestions for good practice beyond the basic minimum (Acas, 2005b; CIPD, 2008c; Diversity Works for London, 2009; Dickens et al, 2009). In addition, there are some targeted guides and websites offering useful guidance, for example the Improvement and Development Agency for local government (IDea) website and publications for local authorities (Dialog, 2004, 2007); the Equality Challenge Unit (2009) for higher education institutions; and trade union websites such as the TUC for trade union members and representatives (TUC, 2006a).

Stonewall is a campaigning and lobbying group working for equality and justice for lesbians, gay men and bisexuals. Part of its activities includes offering support and advice to over 400 employers via its Diversity Champions Programme, as well as operating a benchmarking tool, the Workplace Equality Index (WEI) (Stonewall, 2009). All of the top 100 UK employers for LGB staff in the WEI: had an explicit policy barring discrimination based on sexual orientation; offered the same benefits to same-sex and opposite-sex partners; offered diversity training specifically mentioning sexual orientation; and had experienced no successful employment tribunals relating to sexual orientation discrimination in the previous 12 months. Many organisations in the Top 100 adopted many other practices, although only 31 per cent monitored staff sexual orientation at the point of recruitment, promotion and departure. In addition, Stonewall publishes several employer guides, including a toolkit in the form of eight key steps in order to make sexual orientation an everyday diversity issue (Stonewall, 2007a). Other Stonewall publications offer more detailed advice on some of these steps. These include: *Network groups: setting up networks for lesbian, gay and bisexual employees* (Stonewall, 2005) and *Monitoring: How to monitor sexual orientation in the workplace* (Stonewall, 2006a). Other publications have examined increasing performance among LGB employees (Guasp and Balfour, 2008), provided specific guidance for small employers (Stonewall, 2006b) and for career development among LGB employees (Stonewall, 2007b).

A number of key recommendations based on the good practice guides published by these organisations can be identified. These are summarised in Appendix A.

2.4   Religion or belief

From 2 December 2003, when the Employment Equality (Religion or Belief) Regulations came into force, it became unlawful to discriminate against workers because of religion or similar belief. The regulations also cover providers of vocational training.

Religion or belief is defined as being any religion, religious belief or similar philosophical belief. This does not include any philosophical or political belief unless it is similar to religious belief (DTI, 2003).

The 2001 Census shows that the majority of the population class themselves as Christians (71 per cent), compared with 15 per cent who state they have no religion. Among the non-Christian religions, Muslims make up the largest group (3 per cent), followed by Hindus (1 per cent), Sikhs (0.6 per cent), Jews (0.5 per cent) and Buddhists (0.3 per cent) (Denvir et al, 2007). Half of all Muslims live in London and half outside the capital. Most Sikhs live in larger cities, with 31 per cent in the West Midlands and 31 per cent in London. The Hindu population is concentrated in the cities of London, Leicester, Birmingham, Manchester, Leeds and Bradford.

Although there is a close link between religion or belief and ethnicity, race cannot be conflated with religion belief. For instance, an estimated 43 per cent of Muslims are Pakistani, 6 per cent are black and 11 per cent are white (Muslim Council of Britain (MCB) / DTI, 2005), whereas 97 per cent of Jews and 97 per cent of Christians are white (ONS, 2004)

There are clear differences in employment rates according to race and religion or belief: in 2000-03, the employment rates were 86 per cent for white men and 66 per cent for white women, compared with 75 per cent for Pakistani / Bangladeshi men and 27 per cent for Pakistani / Bangladeshi women (Denvir et al, 2007). In 2004, 31 per cent of Muslim men were out of work, compared with 16 per cent of Christian men; similarly, 69 per cent of Muslim women were out of work, compared with 25 per cent of Christian women (ONS, 2004). Certain religious groups also tend to be concentrated in particular industries. For instance, in 2004, 37 per cent of Muslim men in employment were working in distribution, hotel and restaurant industry compared with 17 per cent of Christian men. Sikh, Muslim and Hindu women are also more likely to work in this industry with over a quarter of each group employed there, compared with around a fifth of women from other groups (ONS, 2004).

Compared with Sikhs and Hindus, Muslims are more likely to be disadvantaged. Muslims have lower rates of labour market participation, the highest male

unemployment rate, larger families, a higher proportion in social housing, the highest incidence of overcrowding and are most likely to live in deprived communities (Beckford et al, 2006).

Generally the research base for issues of religion or belief in the workplace is limited, although recent research has examined the research evidence on pay penalties by religious groups.

A review of pay gaps based on religion or belief showed there to be an adverse pay gap for Muslim men and a beneficial pay gap for Jews. Earlier research also identified a large pay gap for Sikhs. However, evidence of pays gaps between other religions was found to be unclear (Metcalf, 2009). Longhi and Platt (2008) also found that women of all denominations (and those with no denomination) had pay gaps relative to Christian men and these were highest for Sikh and Muslim women (22 per cent).

There are a small number of publications that outline good practice for employers in relation to religion or belief. Acas, for instance, produces a guide for employers and employees on *Religion or belief in the workplace* which describes the regulations relating to religion or belief and gives guidance on good employment practice (Acas, 2005a).

The Employers Forum on Belief is an independent employer's network aiming to share good practice on religion or belief. As well as producing a best practice guide on creating and managing prayer space for employees (*Recovering the Calm*), and a brief outline of good practice in flexibility (*Belief and Flexibility*), they also have available a good practice guide to *Religious Diversity in the Workplace* (Employers Forum on Belief, 2009a, b).

More specifically, the MCB (in association with the DTI) has produced a good practice guide for employers and employees in respect of Muslims in the Workplace (MCB / DTI, 2005). However, most of the limited research and good practice evidence is based on 'religion' with very little discussion of the wider issues around 'faith'.

Some common good practice approaches, which have emerged from these guides, are summarised in Appendix A.

3. Structure and culture

3.1 Approaches to policy

This chapter identifies the key formal policies that were adopted by case study organisations in order to address equality and diversity issues generally. The key policies relate to the formal structures in place to support and further the equality and diversity agenda, and also specific formal written policies relating to specific issues or equality strands.

This section deals with formal policy that forms the framework for addressing and developing the equality agenda. Many of these formal policies are applicable across all the equality strands, although implementation may vary. Specific examples are drawn from case study organisations and these mostly relate to the equality strands of age, sexual orientation and religion or belief. More specific details of policies specific to each strand are covered in Chapter 5 on Policies.

The other side of the coin from formal structures and policy is organisational culture, which are the unspoken rules and assumptions that operate. Structures and policy can be put in place to influence culture through change management programmes and issues around changing organisational culture are also examined.

3.2 Formal structures

The formal structures within an organisation are those that are formally in place to support the equality and diversity agenda. These may include, for instance: designated posts or units with responsibility for equality and diversity; equality and diversity groups; equality and diversity champions; and, equality and diversity staff networks.

All the case study organisations had dedicated units or persons who had responsibility for managing equality and diversity in the organisation.

All organisations also had formal forums responsible for equality and diversity strategy planning and decision-making at the highest level. These groups consisted of varied participants, but included senior managers (often at Chief Executive level) and usually met once a quarter. The bodies were usually supported by a network of other formal structures, such as Equality Champions, staff equality networks, and other equality forums.

Some organisations had a system of diversity champions (in some organisations these were the chairs of staff forums and not referred to as champions, although they

effectively fulfilled the same role). These would be responsible for a particular equality area, and often chair a formal forum relating to the particular equality strand. These champions were generally drawn from senior management level, and their role was to 'champion' that particular equality in order to raise the profile of these issues. These roles were strategic, so champions would aim to affect policy and practice through representing issues relating the particular equality group at senior level. Champions often chair an equality forum dedicated to a particular equality strand, so for instance in the University, the Sexual Orientation Champion chairs the Sexual Orientation Group etc. The champions themselves also usually have a seat on the higher level equality forum at the strategic level.

Several organisations also operated equality staff networks. Separate networks existed for disabled, LGBT, women, race and ethnic minorities, interfaith, different faiths and younger workers. The purpose of the networks varied between organisations and between networks although, on the whole, staff networks tended to focus on staff support. However, they also provided a forum that represented the views of the equality group which could be presented at higher level equality forums, and therefore feed into strategy and policy development.

Box 3.1   University: structures supporting the equality agenda

The University has Equality Champions representing each equality strand (for example Gender Champion, Sexual Orientation Champion, Age Champion, Religion or Belief Champion, and Disability Champion), who each chaired an equality group relating to that particular equality strand, so the Sexual Orientation Champion would chair the Sexual Orientation Equality Group. These specific equality forums would usually be attended by the chair (or representative) of the appropriate staff network group, as well as managers representing different parts of the organisation. These representatives can raise relevant issues emerging from their area in relation to equalities which could be discussed. Each of the equality champions sits on the Equality and Diversity Strategy Committee (which is a high level senior management group chaired by the University Principal and meets three times a year) where they would be able to raise issues emerging from their equality group meetings, share good practice across equality groups and make strategic decisions. This type of formal structure is able to discuss issues relating to equality and diversity at different levels in organisations, as well as representing the opinions of diversity groups at a senior level.

Designated posts and units with responsibility for equality and diversity
Traditionally, diversity specialists (and prior to these equality opportunities specialists) were based within the HR function (Kirton and Greene, 2009). This was the case in a number of the case study organisations. However, in five case studies, the diversity function was external to HR or semi-autonomous from it.

In three cases (the Housing company, Police and Local Authority), dedicated Equality and Diversity Units were located within the equivalent of the Assistant Chief Executive's office. In two other cases, (the University and the Communications service provider) each had a dedicated Unit that was technically part of the Human Resource (HR) function, but was physically removed and had a quasi-autonomous status. All of these units brought together equality issues that related to staff and the customer / client group (for example tenants, the community, students) and had responsibility for advancing the equality and diversity agenda within the organisations. Both the Communications service provider and the Local Authority had had a corporate equalities team of one sort or another for a number of years. The Police had had separate equalities personnel dealing with internal and external equalities issues based in different departments for several years before they were brought together 18 months previously. Other units were more recent (up to one and a half years in their current form) and all had a dedicated budget. Units generally consisted of up to three equality officers, one manager or director and administrative support. Mostly, equality officers dealt with issues in relation to both staff and customer groups, although the Police had two dedicated officers, one dealing with external (community) equality issues and the other with internal (staff) equality issues, with a senior manager overseeing both roles.

In the case of the University, the Local Authority, the Communications service provider, and the Housing company, the Diversity Unit or Team was responsible for designing or updating relevant equality and diversity policies, for example the equality and diversity statement, as well as specific policies in relation to, for example, sexual orientation, religion or belief and age. However, the unit within the Police operated slightly differently, in that it had limited responsibility for producing actual policy. Their role was more about scrutinising how other departments addressed equality and diversity issues throughout their policy and practice and offering support and advice on how to do so. For instance, the HR function 'owned' the equality and diversity statement and other staff-related policies, although it would consult with the Diversity Unit (among others) on equality-related issues. The principal behind this approach was to 'mainstream' equalities throughout the organisation, so that each department was aware of how equality issues impacted on their area and could take responsibility for addressing these.

The reasons for having specialist equality and diversity units outwith HR included: being able to look across equality issues that affect both staff and the customer / client group; being able to drive forward culture change in the organisation more effectively; and having a higher visibility within the organisation. In the Communications service provider, this had come about strategically within the wider HR organisation with a Diversity Centre providing a dedicated centre of expertise with 12 posts. The intention was to ensure a consistent set of policies and practices and 'deliver value by driving diversity best practice' across the company businesses. The Diversity Centre worked with HR business partners who in turn worked closely with line managers in the Communications service provider businesses to deliver their operational agenda. This could include work on specific cases or, for example, monitoring reported incidences of bullying and harassment and then rolling out a special initiative on bullying and harassment or a specific diversity programme to be developed.

Box 3.2   Local Authority: partnership working with a Primary Care Trust

In the Local Authority, strategic partnership working was very much on the agenda as a consequence of its attainment of Level Five in the Local Government Equality standard and in anticipation of the requirements of the new Equality Framework for Local Government. It had decided to make a joint appointment of a HR Director for both the Local Authority and the local Primary Care Trust (PCT) in order to enhance the way in which local partnership worked. These two major local employers had recently developed a 'Workforce Reflects the Community Policy'. In this context, the Local Authority Diversity and Equality team worked 'in partnership' with the HR team and the new PCT Equality and Diversity team to encourage the sharing of good practice across both organisations.

'I think the relationship with the PCT is still quite embryonic because their equivalent to us… has only recently been put in place… we are in discussions of how we are linked up with their team and we are starting to do more joint working so this year there are some proposals around doing our submission to the Workplace Equality Index together…and to think how we do that. So I think there are a lot of opportunities… I think thinking about the "Workforce Reflects the Community" at the moment for us is about broadening it out from race and I think there is the potential to do that with the PCT as well.'
(Diversity and Equality Co-ordinator, Local Authority)

Clearly, there was significant overlap between the role of equality and diversity units and the HR functions in respect of responsibilities relating to staff. In all cases, equality and diversity units worked closely with the HR function within their organisation. However, although all reported having good communication and relations between the two functions, in some cases, there were some grey areas where it was not entirely clear who should have responsibility over certain things. For example, grievance procedures were generally owned by HR, but where the grievance related to an equality issue, the diversity and equality units had greater expertise. This may reflect the relatively new relationship between these as two separate functions. However, it also points to the importance of giving consideration to how the responsibilities should be divided, the relative roles of each function and the methods of communication between the two.

The diversity specialists who were located within the HR or people function did not see their remit as being restricted to employment issues. Equality and diversity was seen as an issue that affects the whole organisation and was not limited to employment. In a couple of the organisations the conflict over where equalities were located was seen as something that needed to be addressed.

The Equality and Diversity Units / Teams also worked closely with the appropriate departments that dealt with customers or clients, for example customer relations departments. Having responsibility for equality issues in relation to customers and staff meant that these areas could inform each other. For instance, consultation with community groups by the Police highlighted local areas where police recruitment could be targeted in order to reach under-represented minority groups. The Housing company also consulted with customers (generally tenants) to identify needs based on equalities. This information could then be used as evidence to highlight the business case (meeting customer needs) for equalities to the appropriate parts of the company.

3.3   Policies

All organisations had a general equality and diversity policy or strategy. These statements outlined the organisation's overall policy in relation to equality and diversity and (in relation to strategy) how these were supported (for example through Diversity Units etc).

The statements varied in their content and emphasis, but general aims included the likes of: eliminating discrimination and unfair treatment; ensuring fairness and equality; creating an inclusive environment; responding to diverse needs of staff and clients; positively promoting equality; and providing a commitment to meeting (and

often going beyond) legislation. For instance, the Police's Fairness and Equality Policy Statement ensured that 'people are valued and treated with dignity and respect'.

Organisations also had a range of general staff policies covering issues such as grievances, flexible working and leave, and equal pay, where specific equalities might or might not be referred to directly. The approaches to incorporating each equality strand into policy differed. In some cases, organisations had developed individual policies relating to specific equalities, such as a Sexual Orientation policy, an Age Discrimination policy, and / or a Religion or Belief policy. These policies detailed the organisation's commitment to eliminating discrimination and policies specifically relating to the particular equality group. In another organisation separate policies were produced for each stage of the employment cycle and equalities strands were integrated within these, for example a recruitment and retention policy, promotion policy, learning and development policy and retirement and severance policy.

Box 3.3   Housing company: diversity handbooks

The Housing company had a general Equality and Diversity (ED) strategy covering 2008-10. In addition, a series of handbooks entitled 'Diversity Matters' and referring to specific equality issues were produced. Current handbooks had been produced in relation to disability, cultural awareness, sexual equality (including sexual orientation) and gender and another handbook on age was planned. These handbooks detailed company policy in relation to the equality strands, and discussed the use of appropriate and inappropriate language.

These handbooks were available electronically on the company intranet and copies were distributed to all members of staff (who had to sign that they had received a copy). There was a feeling among the ED team that staff were more likely to read a document in hard copy than when on a computer screen. The line managers who participated in the case study found the booklets very helpful and the launch of the sexual equality handbook seems to have made quite a impression:

> 'You can remember when they came out, everyone was sitting in the office discussing it and saying "I didn't know that"… everyone just starts talking about it.'
> (Line manager, Housing company)

Table 3.1 outlines the relevant policies within each organisation.

Table 3.1   Formal written policies within the case study organisations

	General equalities policies	Policies relating to specific equalities strands
Children's charity	Equality and Diversity Policy	See the Person (statement on LGBT issues).
Housing company	Equality and Diversity Strategy 2008-2010. Equality and Diversity in Service Provision policy Equality and Diversity in Employment policy	'Diversity Matters' handbooks on disability, cultural awareness, sexual equality (including sexual orientation) and gender. Other handbooks are planned in the future, e.g. on age.
Retail company (large)	Diverse Colleagues Diversity Handbook	Handbook on cultures, religions or beliefs. Guide to flexible working practices.
Library	Unified Generic Equality Scheme (Disability, Gender and Race)	Religious and cultural guidelines for readers and visitors to the Library.
Local Authority	Valuing Diversity: Policy Statement on Diversity and Equality. Equalities Monitoring Guidance	Age equality scheme 2009-2012; Religion / Belief equality scheme 2009-2012; Sexual Orientation equality scheme 2009-2012; LGBT history month booklet and events; Faith calendar and guide to borough's different faith communities; Ramadan briefing for managers; prayer breaks and religious observance days policy.
Police	Fairness at Work (the equality statement)	
Communications service provider	Equal Opportunities and Diversity Policy	Fixed age retirement age abolished in 2005; all policies age neutral; career / planning policy and flexible retirement options; 'Respect' handbook outlines approach to faith in the workplace and policies on uniform and food; transgender policy including process to be adopted during transition; same-sex benefits since 1981 now including gay adoption.
University	Equality and Diversity Policy	Race Equality Scheme Action Plan, Age Discrimination policy (including retirement policy); Religion or Belief Policy; Sexual Orientation Policy.

Many organisations went beyond the basic legislative requirements. By having dedicated diversity specialists, formal decision-making forums, diversity champions and equality staff networks, and many formal written policies, the organisations were

going beyond what legislation required, and ensuring that they complied with at least the minimum required standards.

The current legislation requires the Local Authority to address discrimination against employees on the basis of all six equality strands but the duty to the provision of services and the active promotion of equality was only in relation to race, gender and disability. However, the organisation believed that it had a:

> ... strong moral and social duty to recognise that discrimination takes place and inequality exists for individuals and groups belonging to all six equality strands.
> (Age Equality Scheme, 2009-2012)

Thus it was committed to going beyond the requirements and had published individual schemes for all six strands.

3.4   Organisational culture and change management

Part of the purpose of diversity and equality units / staff was to affect cultural change throughout the organisation. The aim of this change is to embed a culture of understanding, awareness and continual improvement in equality and diversity. The various structures, communications and training and other policies and practices were put in place to affect this desired change. For instance, one aim was to change attitudes and behaviours within the organisation, so that inappropriate attitudes and behaviours could be challenged, and even if attitudes could not be changed, then behaviour could:

> Sometimes you are not going to change someone's personal opinion, but it's managing that and explaining that you can have a personal opinion, but you can't express it if it's not in line with our policy [on equalities].
> (Line manager, Housing company)

For a number of organisations, there was a clear link between the organisational culture and the implementation of equality and diversity policies. In the case of the Children's charity it was linked to the basis and values of the organisation where the individual worth of every individual is respected. These values are included in everyone's job description and referred to in job interviews, they are also reiterated during some staff meetings:

> ... it is part of the habits and ways of thinking.
> (Children's charity)

Different cultures within an organisation

There could be different equality and diversity cultures within organisations, with some areas perhaps more receptive to the message than others. For instance, one organisation reported that there were localised issues around bullying and harassment. This generally took the form of jokes and general banter with people not necessarily being aware of the impact they were having (the University). Some departments may be quicker at picking up the equalities messages than others, and who these might be was not necessarily obvious:

> It surprised me at first that the trade side were really quick to pick up on it. You go into a house, you're doing your job, if someone's got particular needs, it makes your life easier if you meet those needs, and that very logical approach that yes you can tailor your service to an individual…just made sense to them.
> (Line manager, Housing company)

Staff turnover and cultural change

One area within organisations that could be more resistant to change was identified as being among longer serving staff. For instance:

> ... inevitably some of the long-standing managers are old school and there are challenges there.
> (ED Officer, Housing company)

This had an impact on the pace at which culture change could be affected, with one interviewee at the University estimating that 'it takes 10 years to have an impact', this being in relation to any cultural change and not specific to equality and diversity. Part of this reason might be attributed to low turnover and staff not being used to cultural change:

> I see a shift in new lecturers because they come in with much less tolerance for exclusivity or behaviour that is likely to discriminate…and 10 years ago, there was a different generation of academics coming and they were coming in with the sorts of discriminatory practices as part of their experience, so I think that's a big shift.
> (LGBT network leader, University)

The low staff turnover in one organisation was seen as a barrier in changing the diversity of the workforce. The Library had a turnover of around four per cent. Moreover, the catchment area for the remoter sections of the Library (where around

50 per cent of staff are located) is not diverse, which meant that changing the make-up of the organisation was a slow process.

Some staff attitudes in the Police were also perceived to be slow to change. This was the case in relation to some staff around confidence to self-report disability, sexual orientation and religion or belief. This was attributed to lingering suspicions about the effect disclosure would have on promotions etc. This may reflect the necessary slow pace of enacting widespread culture change within an organisation, especially one where staff tend to remain in post for a relatively long period of time.

On the plus side, where new employees were recruited, there was an opportunity to follow up equality and diversity induction training through organisational equality networks, as for example with the apprentice network in the Communications service provider.

Box 3.4   Communications service provider: apprentice network and cultural change

'This was set up first and foremost as a sort of a reassurance that the apprentices have got a support network and also to provide a platform for apprentices to share ideas, meet up with each other, network, gain more…in terms of personal development, professional development and widen their horizons…Trying to help mould what could be some of the leaders for the future of the company but also they won't just be leaders for the future, they will have an experience and background in terms of diversity of all the strands because we cross-promote across all the strands of diversity. So all the other networks invite us and our members to their events and likewise. So at our "What Next" event we had every diversity network represented at the break-up area for lunch and there were flyers, leaflets, representatives, all going round talking to them.'
(Member of apprentice network)

Progress in cultural change

Despite the various issues that presented themselves when attempting to affect organisational culture change, most of the organisations felt that the various equality and diversity initiatives were having an impact (although to varying degrees). A number of staff in the Police reported cultural change that had taken place over the course of several years. For instance, LGB staff reported that it was much easier to be 'out' in the organisation than it used to be (although to a certain respect this also reflected changing attitudes in society at large and there were indications that this was not necessarily the case throughout the Force (see above). The Police also

reported major changes in Police forces across the country in relation to equalities issues:

> Gone [are] the days when a Divisional Commander could reach that level not fully understanding their community…[they now have to be aware and] deal with different circumstances, dealing with religion, dealing with faith, dealing with different race… and there is a heavy onus on them to do that. (Diversity Unit Manager, Police)

Within the Local Authority, the perception of the Diversity and Equality co-ordinators, was that although people still complained about equality impact assessments and what they saw as form-filling, that over time:

> ... one of the brilliant things… was seeing the way in which people had become passionate [about] changing things at a grassroots level.

A key element in achieving this had been the encouragement of peer working around the Equality Standard (Diversity and Equality Adviser, Local Authority).

Box 3.5   Local Authority: using peer review

'When you go to events with people from other authorities, they kind of come to the Equality Standard and they think oh, my God, I've got to fill in that form. You know, that's the kind of be-all and end-all of what this is about whereas that's just one way to help you do it. That's the thing that feels different here. And something that I think we've all been anxious to protect and develop. …for instance at the moment there is the annual review of team plans going on across the organisation. So there is a sample of team plans which are peer reviewed and equality proofed, each team is expected to have some actions around equality and diversity and that's checked against that assessment and then that report goes to Corporate Management Team' (Head of Scrutiny and Equality, Local Authority).

It was very difficult to measure cultural change within an organisation (see also the section on monitoring) and most evidence was anecdotal. For example, the Communications service provider said that changing attitudes had been evident in the coverage of sexual orientation matters in the corporate newspaper and corporate blogs. Where critical views might have been expressed in the past, now if a critical view on corporate equal opportunities was expressed then it was 'heartening' to see the number of employees who wrote in to say that such a comment was 'totally inappropriate' or express strong disagreement with it.

3.5 Conclusion / summary

Having formal structures to support and promote the diversity and equality agenda is important in the case study organisations. In particular, having dedicated diversity and equality specialists (wherever based) with particular expertise who could look at issues across the organisation was a core part of organisational equality strategies. Also, a senior level equalities strategy committee was important in all the organisations for making decisions at the strategic level. Other support mechanisms could also play a key role, in particular the practice of having Diversity Champions. Having formal written policies on a range of specific equality areas was also popular.

However, some considerations around the location and role of diversity and equality specialists emerged, in particular, whether these specialists should be part of the human resource function or be located in some other area of the organisation (such as the Chief Executive or equivalent's office). Maintaining a close and effective relationship between HR and independent or quasi-autonomous units was very important. There were also some 'grey areas' around how responsibilities were divided between the two. Given the relatively recent emergence of separate diversity units (in most cases), these issues were still very much being worked out by organisations.

A key aim of diversity and equality units / staff was to affect cultural change throughout the organisation with the aim of embedding a culture of understanding, awareness and continual improvement in equality and diversity. However, this was not without its challenges. There were different equality and diversity cultures within organisations, with some areas more receptive to the message than others. Low staff turnover could affect the pace of culture change since a greater resistance to change was identified among some longer serving staff.

4.   Context and factors affecting policy development

This section examines a range of contexts and factors that impact on the differential development of equalities policies in organisations. Organisations varied in their approaches to equalities generally, and to the specific strands of age, religion or belief and sexual orientation. They also differed in the level of development of policy and practice across and between equalities strands. Some organisations had better developed policies in relation to some equality strands than others and a small number had fairly well developed policies across all three strands.

There were various reasons for these differences which included: differences between sectors; regional differences; size, make-up and dispersion of the workforce; flexibility and working schedules; clients and customers; benchmarking; unions and staff forums, and; senior management support. These contexts and factors are explored in this section.

4.1   Reasons for adopting equality policies

When examining reasons for adopting equality policies, a distinction can be made between: (a) the development of a general equality agenda and; (b) actual policies and practices developed.

Reasons given for the development of general equality agendas varied between the organisations. In some cases, these seem to have been triggered by formal external factors such as legislation, audits, inspections and inquiries. In others, they seem to have a historical connection with certain groups. For example, the Retail company was an example of good practice in relation to the employment of older workers long before the age discrimination legislation was introduced. In addition, in the Children's charity, there has been a strong LGBT staff forum that has championed LGBT issues for a number of years, which can be attributed to a number of individual members of staff who have driven this agenda forward.

In the UK, research has suggested that local authorities have been in the forefront of equalities policies and practice focusing on gender, race, disability and sexual orientation since as early as the 1980s (Cooper, 2006; Colgan et al, 2009). In the Local Authority, as an inner city London borough with a very diverse population, equalities had had a very long history. Interview respondents said that there had been a corporate equalities team of one sort or another for 15 years or more and equalities had been an important issue, albeit initially focusing on race and economic inequality since at least 1994.

In the case of the Police, the Stephen Lawrence Inquiry some 10 years ago and, more recently, the BBC's Secret Policeman investigation which identified racism among police trainees had prompted a major high-profile programme to address racism in the Police and to understand equalities in relation to policing communities. This, of course, was a factor affecting all police forces across the country, although in the case of the Secret Policeman investigation, one respondent said:

> ... and one [trainee] was actually joining [the Police], so that really hit home at the time.
> (Diversity Unit Manager, Police)

Various inspections carried out in the Police further highlighted that it had been doing well externally in addressing equality issues in relation to communities, but were less effective on internal staff issues. This then prompted further development in relation to staff equalities issues.

In the case of the Housing company, the main impetus for pursing equality policies had come from an Audit Commission inspection which was carried out on behalf of the Housing Corporation in 2005/06. One of the key strands of the inspection was equality and diversity and so the company responded by allocating the remit to a senior member of staff in order to address this requirement.

Although some organisations had been prompted to develop their equality and diversity programmes by formal external factors such as legislation, audits, inspections and inquiries, these organisations had all gone well beyond the required statutory minimum, and had recognised other important reasons for developing the agenda (such as the business case, meeting customer needs and public perceptions of the organisation). Although it was external factors that kick-started the equality agenda in some cases, it was other factors that prompted the extent and shape of how these programmes were developed. In a number of organisations, the actions of certain individuals or staff groups have been central in driving certain areas of equalities forward (and perhaps may explain why some equalities strands have received less attention).

4.2   Differences between sectors

The sector within which a business is located makes a difference to the development and implementation of equalities programmes. For instance, the impetus for adopting programmes sometimes varied between sectors. A clear example here is the high profile Stephen Lawrence Inquiry in the case of the police. This prompted huge changes in police forces across the country and has meant that equalities have been

high on the agenda in this sector for over 10 years, whereas it is relatively new in other sectors (for example housing and education) where there was not this early imperative.

Each sector often also has its own standards, for instance, there are often formal inspections carried out within public sector organisations (specific to the sector) which have their own equality requirements, for example the police inspections, the housing inspections.

There are also different legal requirements on public and private organisations. The public sector is required to adhere to equality duties in relation to gender, race and disability. This also affects organisations which are contracted to public sector companies since they have to meet equality standards in the tendering process.

The business case for including equalities policies was a primary factor in the private sector. A clear connection was made between the need to attract and retain a diverse range of staff and obtaining high levels of productivity and profit. The Communications service provider stated that:

> It is crucial that our people reflect the diversity of the society in which we
> do business. This puts us in a strong position to understand and anticipate
> the ever-changing needs of our customers.
> (Communications service provider, Annual Report, 2008)

In the Local Authority and the Housing company, the 'service case' was emphasised as key, thus the Head of Scrutiny and Equality at the Local Authority stressed the need to remember 'It's that service improvement issue which is an absolute driver'. It had developed separate Equality Schemes for Age, Religion and Belief and Sexual Orientation prior to combining these schemes into a single Equalities scheme in order to develop a more comprehensive understanding of local issues. This ensured that issues were not diluted or lost and identified if a specific focus was necessary for services or employment in relation to each strand.

4.3   Regional differences

The region within which an organisation is based can potentially make a significant difference to the development of equalities policies. For instance, regions vary considerably in the distribution of some equalities groups, such as race and religion. Physically, these and other equalities groups may be located in particular pockets or widely dispersed throughout a region. In the case of rural areas, equalities groups may be harder to identify because they may be more geographically dispersed.

These factors will affect both the pool of potential staff from which organisations can recruit and the nature of the client or customer group which the organisation serves.

Regional differences can affect organisations differently depending on whether they are based in one region or across different regions. A number of case study organisations were based within one region, for instance, the Local Authority, the University, the Police and the Housing company, making the above issues particularly pertinent. For instance, the Police were based in a largely rural area, where equalities groups were widely dispersed and made recruiting from equalities groups more difficult.

A national organisation may have standardised policies that apply across employees in different locations, but will often still need to be responsive to local needs. This was the case for both the Children's charity and the Retail company. The Children's charity operates across the four countries of the UK. Although policy is derived centrally from the head office in London, each of the regions are semi-autonomous in terms of how they implement legislation and policy. This system is particularly effective because of the differing legislative contexts in Northern Ireland, Scotland and Wales.

Box 4.1   Retail company: responding to local communities

The Retail company is part of a multi-national corporation and being sensitive to local contexts is an important part of its operation. All stores aim to reflect the local communities in which they operate in terms of their customers and their staff. In ethnically mixed areas, they aim to reflect this in the produce they sell and in the mix of staff. This is seen as making strong business sense since attracting a greater ethnic diversity of staff will attract more customers from that group into the store. The stores also celebrate relevant religious festivals for staff and customers in store such as Eid and Hanukkah.

4.4   Size, make-up and dispersion of the workforce
The size, make-up and dispersion of the workforce can make differences to the types of policies which it is practical to develop and implement, and the ease with which policies can operate successfully.

The size and make-up of the workforce can make a difference to the practicality of some policies. A smaller workforce and / or a smaller number of equalities groups (particularly for lesbian, gay and bisexual and religion or belief) may mean that there are simply too few individuals, for instance, to justify setting up a specific equality

network. When a network is set up, there may be limits to the activities that can be pursued, so for instance, offering mentoring from staff within the organisation may not be possible because of limited staff numbers.

The dispersion of staff can also have an impact. In some organisations, for example the University, staff were based at a few sites in relatively close proximity, again making staff networks easier to operate, and for instance, the provision of some facilities, such as quiet rooms more practical. However, where staff were widely dispersed between a large number of small sites, greater practical problems arise. For instance, although many administrative, management and support staff are based at one location at headquarters in the Police, most of the operational police officers are based in regional headquarters and police stations in the community. This makes operating staff networks potentially more of a challenge in terms of organising face-to-face meetings and social events. As one interviewee noted:

> It's really hard because the geography mitigates against us really, because we are a big geographical force…and a lot who take part are generally operational police staff and a lot of them work shifts.
> (GPA Chair, Police)

Having staff based on different sites can also have implications in terms of making some facilities available. For instance, the Housing company and the Children's charity did not provide a dedicated quiet room or prayer space for this reason. One interviewee noted:

> One issue in terms of providing that level of service is that our workforce is quite dispersed. So you get a situation at headquarters were we are, well not quite like sardines, but there would be little opportunities, but in other buildings we could probably provide space, but it would mean travelling
> (Inter-Faith Staff Group Member, Housing company)

The Children's charity partly addressed the issue of having dispersed staff by having conferences for staff forums every two years. This gives staff from the forums an opportunity to meet and discuss issues to take forward. In other organisations, electronic communication methods are relied on where staff are geographically dispersed or work differing shift patterns.

Box 4.2 Communications service provider: using electronic media to link dispersed employees

As a global company, the Communications service provider had staff networks with members in the UK and from other countries, for example, the Muslim network not only had members worldwide but also one of the members of the Muslim network Committee was based in Dubai. Through a range of electronic media and ICT, these groups were able to access information and communicate via equality network intranet sites, email communications, conference calls (to replace face-to-face meetings if required) plus video-events which employees could access on line.

4.5 Clients and customers

The nature of the clients or customers of an organisation also had the potential to shape the development of policies, with all the organisations perceiving the interface with clients as an important motivation for moving forward the equalities agenda.

This was particularly evident in organisations that had dedicated diversity staff or units that encompassed both staff and clients / customers. For instance, the Police carried out extensive consultation with community groups and individuals representing diverse equalities. This helped to inform how best to meet community needs in terms of policing, and included for instance, attempts to recruit a workforce that reflected the make-up of the community (a common aim across several organisations), as well as suggestions as to where and how to recruit from different equality groups.

At the University, equalities groups existed among the student body before among staff, therefore setting a precedent. The University also served a wide range of students, including from home and aboard, with diverse needs. So, for instance, a chaplaincy had existed on the campus for some time, meeting the needs of students. The infrastructure was therefore in place also to offer similar facilities to staff.

Box 4.3   Library: developing policy in relation to users and staff

Equality and Diversity at the Library, and the way in which policies were developed and implemented, take into account, and are relevant to, both the staff and the users of the Library. The Library was committed to equality of access to the Library for all readers. For example, the Library had to sustain formal requirements under the 'Conditions of Library Use', including dress codes required for security reasons, whilst determining a careful balance between the accommodations that could be made for readers and visitors wearing devout religious dress and not discriminating against other readers. The Library thus consulted with key faith leaders on provisions for access to the Library with regards to religious dress. It was found that there could be reasonable justification for the continued application of the 'Conditions of Library Use' with some accommodations that did not restrict access for people of different religions and beliefs or discriminate against other readers. For instance, under the necessary identity checks, female security guards will check the identity of Muslim women wearing veils.

Additionally, when holding a 'Sacred Exhibition' to which many visitors of different and orthodox religions were expected to attend, there were limited facilities for prayer. After consultation with faith leaders, other alternative arrangements were made. These included placing listings of local religious establishments that would be able to accommodate visitors to their facilities on the website and including them in handouts. Staff also received religion and belief awareness training, in order to give staff confidence and consistency in handling different religion and belief needs.

4.6   Benchmarking

All organisations were involved in some form of benchmarking activities. This included benchmarking: at a national level across organisations, for example national forums such as Stonewall, Employers Forum on Age, Employers Forum on Belief, etc.; between organisations in the same industry (for example industry bodies); and between different organisations within the same local area.

Benchmarking was an important activity that helped organisations develop and learn how to implement policies and share good practice. For many organisations, it was about 'raising your game'. For one private sector organisation, benchmarking was a crucial way of being 'ahead of the game' (Communications service provider), particularly in terms of recruitment and retention and in terms of being able to evidence good practice when contracting with the public sector. Some companies also claimed more altruistic reasons for benchmarking. For instance, 'to improve the

quality of life for everyone living and working' at the Local Authority and as an interviewee from the Communications service provider said:

> We do feel it's important actually to share best practice with other companies. Particularly our suppliers and customers and … from a societal point of view, by sharing good practice we can collectively improve working lives. This in turn improves motivation and job satisfaction and therefore the overall efficiency of our organisations.
> (Head of People Practices, Communications service provider)

National level benchmarking
Many organisations carried out benchmarking at the national level through subscribing to one or more national level organisations. Organisations subscribed to included Stonewall, Employers Forum on Age and Employers Forum on Belief. The Communications service provider had also begun to benchmark internationally. In 2008, it was successful in the Schneider Ross Global Diversity benchmark, and was awarded the AARP International Innovative Employer Award in recognition of its age policies. In 2009, it entered the International Lesbian and Gay Chamber of Commerce's International Business Equality Index benchmarking.

These organisations provided support and advice as well as a formal benchmarking tool. For instance, organisations could benchmark their progress on LGB issues through Stonewall's Workplace Equality Index (WEI). Based on the WEI, organisations were able to get advice and feedback on how to develop and improve their policies and practices to meet the needs of LGB staff. This also provided useful benchmark evidence that organisations could use to make a case for action at senior management level.

Although Stonewall and the WEI was focused on LGB issues, the Index was also found to be a useful guide for developing policies on other equality strands. As one respondent says:

> Most of the things that we found from that index were across the board for diversity so there was a good steer from the start.
> (Diversity Unit Manager, Police)

It sometimes formed a catalyst for developing other equality stands. For instance, having joined Stonewall, the Housing company set up networks across other equality strands in addition to LGB. Membership of one of these national forums could also explain why some organisations have better developed policies on some equality

strands than others. The Police, for instance, had focused their energies on LGBT issues when it joined Stonewall and completed the WEI process in the previous year. This progress had been maintained and developed although in 2009, it was also developing the age equality strand, having recently joined Employers Forum on Age.

While organisations were generally very positive about their involvement with national benchmarking forums, a couple of issues emerged.

Firstly, these forums promoted a particular set of policies and practices as good practice, but it was felt that these were not necessarily appropriate across all organisations.

Secondly, the cost of joining these national benchmarking organisations prohibited some organisations from joining more than one. Although guidance given by one equality forum could provide generic lessons that were applicable to other equality strands, these forums still could not provide expertise and support across all the strands.

Therefore, at a national level, bodies such as the Equality and Human Rights Commission and Acas represent an important resource for many organisations which cannot afford to join all the major national benchmarking forums.

Among the case studies, the Police in particular, stated that it had made good use of the Commission's Helpline. However, some respondents suggested that the Commission could be doing more to support organisations. Specific suggestions included that the Commission should: provide more guidance and information, particularly in relation to the new strands; improve usability of the Commission website; provide benchmarking information on equality local population profiles; provide explanations of official equality categories; and provide examples of what constitute bullying and harassment based on different equalities. There also seemed to be some lack of clarity about the role and responsibility of the Commission in supporting higher and further institutions and charities.

Other benchmarking
Organisations also undertook benchmarking between organisations in the same industry, and / or benchmarking between organisations in the local area.
Within the public services, a range of bodies, such as the Audit Commission and Ofsted, assess and rate public service provision.

The Equality Framework for Local Government (EFLG) (previously the Equality Standard for Local Government (ESLG) has been adopted by 90 per cent of all local authorities. The standard recognises the importance of fair and equal treatment in local government services and employment and was developed primarily as a tool to enable local authorities to mainstream age, disability, gender, race, religion or belief and sexual orientation into council policy and practice at all levels. It has been used as a voluntary best value performance indicator with councils reporting what level of the standard they had reached from five levels (IDeA, 2008).

Many organisations participated in local benchmarking, with this usually occurring between those of a similar type. So for instance, the Housing company was involved in initiatives with the local council. The Police is developing closer equality and diversity partnership networks with neighbouring police forces in order to share information and resources and develop an Equality Standard. The Children's charity is involved in a network with other charities to share information.

4.7   Unions

Unions representing staff were recognised in all of the organisations taking part in the case studies. In many cases, there were several different unions (often representing different types of staff) within one organisation. Views on the influence of trade unions within organisations differed but on the whole, the main impetus for driving equalities agendas was thought to come from within the organisation itself rather than primarily from union involvement. However, it was agreed that unions were consulted on equalities policy at various levels. For instance, union representatives sat on organisational diversity and equality forums. One of the organisations raised the issue that there has been less interest from the union on issues of faith. Again this highlighted the lack of clarity in relation to how issues of faith should be interpreted and represented by both unions and employers.

Trade unions have developed equality policies and internal equality structures for women, black, disabled, LGBT, retired and young members over the last 25 years (Colgan and Ledwith, 2002), This means most now have well developed policy and expertise in these areas although religion or belief may be a newer area for them. Trade unions have campaigned on a range of equality issues nationally as well as negotiating and being consulted internally on these issues at workplace level. For example, trade unions and the TUC have long campaigned against discrimination on grounds of age and sexual orientation and for effective legislation to tackle it. Trade union representatives are trained in equality matters through their unions and unions such as the CWU, UNISON and UCU have equality representatives at workplace, branch and regional levels.

The contribution made by unions to the equalities agendas within organisations was, in one view, largely determined by the interest and commitment of these individual local union representatives. A further view suggested that unions may perceive the organisations to be making a significant commitment to equalities of their own accord and therefore minimal union intervention was required. A union view, however, was that too often unions were not sufficiently consulted or were given insufficient time for consultation on equality measures such as monitoring which could be done more effectively following management and trade union agreement. In the Library, the Children's charity, the Local Authority and the Communications service provider, the unions were keen to be consulted and involved in the development and implementation of equality and diversity policies. In the Library, management and the unions meet formally through an Equality and Diversity Working Group and the unions are heavily involved in, and very engaged with, diversity policies. For example, unions sit on the various action groups. Similarly, in the Children's charity, the union sits on the corporate equalities board.

Within the Communications service provider, the unions worked with the company through a range of industrial and equality committees at group and operational level. They had responded positively to equalities monitoring so long as it was done following appropriate consultation and with an appropriate purpose in mind (TUC, 2006a). As one manager said:

> ... our unions will ask us for a statistical analysis on representation and
> they recognise the importance of that. So our unions want to know that we
> have, we can demonstrate equality in the workplace, so it's a mutual
> benefit.
> (Manager, Communications service provider)

The management view was that 'diversity is an area where we have a common view' and given the unions have 'diversity leads within their own organisation, there is a big influence there' (Head of People Practices, Communications service provider). In addition to consultation and negotiation, union representatives were clear that promoting integration in the workplace also included much of the case and educational work they did at grassroots level. This sometimes involved working with line managers to tackle cases of harassment and discrimination and ensure work / life balance and family friendly policies were fair and inclusive of LGBT people, across age groups and respected people's religion or beliefs.

Unions such as the CWU, UCU, UNISON have long permitted self organised groups and so, in addition to the equalities staff forums in organisations, there were also

similar forums within the unions. In these organisations, LGBT union groups were in existence prior to the establishment of organisational LGBT networks. This was the case in these three organisations and in these cases, the trade unions had made the strategic decision to be supportive to, and work alongside, the equalities staff forum (Union representatives, CWU and UNISON).

4.8 Senior managers

Generally, organisations felt that it was essential to have support from managers at the most senior levels in order to pursue an equalities agenda effectively. Support from senior managers (and in particular the Chief Executive, or equivalent) is vital in order to set up and resource the structures that can take forward the equalities agenda. It was decisions made at the most senior levels that resulted in the allocation of resources and the establishment of Equality and Diversity units and other structures to support the equalities agenda. Continued support after this stage was also considered important because it raised the profile of equalities in the organisation, making it more visible and more likely to be taken seriously by staff.

Box 4.4 Local Authority: supporting senior managers

The Local Authority had had a corporate equalities team for 15 years or so, but had decided it needed to adopt a 'mainstreamed' and 'partnership' strategy in order to engage and equip councillors and senior managers to embed scrutiny and equality into their thinking and activities.

'I think one of the things about creating scrutiny in equalities was we'd got to a stage really that we needed to up the ante a bit… get the officers to be more leaders really than they'd been in the past and thinking about things in a more partnership orientated way because the old model was very much a bit like the corporate "thought police" idea… we have a sum or equation which is that scrutiny plus equality equals cohesion… So the leadership is that, is something about us equipping senior managers and Members around any of those issues. And then their role… is if you like to build a partnership so within the organisation and outside of it to put these things into place. That's the theory of it.'
(Head of Scrutiny and Equality)

While having support at senior levels is necessary, the commitment of particular individuals can sometimes make all the difference to how, and the extent to which, the agenda is pursued. These individuals can be senior managers appointed to address the diversity and equality agenda, or they could be existing members of staff. A senior manager (formally in charge of Customer Relations) at the Housing

company was credited by a number of other staff as having played a key role in driving forward the current equality and diversity agenda in the company through her interest, commitment and enthusiasm for the issues. Similarly, in the Children's charity, the commitment of small groups of individuals has been key in promoting LGBT issues in the organisation.

4.9   Conclusion / summary

The research carried out within the eight case study organisations showed that the variety of responses to the equality issues displayed could be attributed to a number of key differences between the organisations.

There were important differences between organisations based in different sectors. Particular external factors to each sector, such as audits, inspections and public enquiries, as well as legislation, were sometimes the stimulus for developing the equalities agenda. Some sectors were particularly focused on the 'service case', while in the private sector, the primary factor was the business case. However, irrespective of the initial impetus, all organisations had gone beyond the legally required minimum and embraced a wide range of reasons to develop the equalities agenda further.

Other factors that made a difference to the equality policies and practices adopted included regional differences. Regional variations in the distribution of some equalities groups and dispersion of populations can potentially make a significant difference to the development of equalities policies. While national level organisations may have standardised policies that apply across employees in different locations, they also tried to be responsive to local needs.

A smaller workforce and / or a smaller number of equalities groups (particularly for lesbian, gay and bisexual issues and religion or belief issues) may mean that there are simply too few individuals to make some policies practical, for instance, setting up a specific equality network. Where staff are widely dispersed between different (and particularly small) sites also had implications in terms of making some facilities available, such as quiet rooms. Electronic communication methods and conferences for staff forums were two potential solutions used by some case study organisations.

All the organisations perceived the interface with clients as an important motivation for moving forward the equalities agenda. For instance, consultation with community groups could feed into recruitment policies.

All organisations were involved in some form of benchmarking activities. This was an important activity that helped organisations develop and learn how to implement policies and share good practice. Types of benchmarking included: at a national level across organisations, for example national forums such as Stonewall, Employers Forum on Age, Employers Forum on Belief; between organisations in the same industry (for example industry bodies), and; between different organisations within the same local area.

Views on the influence of trade unions within organisations differed but on the whole, the main impetus for driving equalities agendas was thought to come from within the organisation itself rather than primarily from union involvement. However, it was agreed that unions were consulted on equalities policy at various levels. A union view, however, was that too often unions were not sufficiently consulted or were given insufficient time for consultation on equality measures such as monitoring which could be carried out more effectively following management and trade union agreement.

Support from senior managers, especially the Chief Executive or equivalent, was considered vital in order to set up and resource the structures that can take forward the equalities agenda. However, the commitment of particular individuals could sometimes make all the difference to how, and the extent to which, the agenda is pursued.

5.   Practices

This chapter focuses on the particular practices adopted by each of the case study organisations to implement their equality and diversity policies. It will examine how each of the practices is used to implement equalities across all the strands and with particular reference to the new strands. Where appropriate, a number of case study examples are used in addition to employee perspectives. The practices that this chapter focuses on include: communication and raising awareness; management support; staff equality networks; monitoring and reviewing workplace policy and practice; recruitment and retention; training and development; flexible working and facilities; challenging discrimination and harassment; retirement and pensions; and company performance.

5.1   Communication and raising awareness

This section examines the mechanisms that the case study organisations use to ensure the effective communication and awareness raising of equality and diversity issues.

Communication

Across the case study organisations, implementing a variety of methods of communication is seen as the most effective way of communicating equality and diversity issues. The methods used include email, the intranet, newsletters, team meetings, notice boards, letters and cascade systems. The extent to which each of these methods is employed depends on the nature and size of the organisation. Electronic methods of communication such as email and intranet are commonly used. Perhaps the most widely used in larger organisations is email, although the limitations of the system are recognised (for example large volumes of emails, emails not being read).

Box 5.1   Library: communicating diversity

The Library uses a wide range of methods to communicate issues to both staff and to users of the Library. It has a cascade mechanism where new projects and initiatives will be discussed and agreed by the Executive Team and then appropriately cascaded down the organisation from the senior managers down to the work teams. It also has an award winning web site, which includes information on all the policy and diversity plans and progress reports, as well as an intranet system, where six news items can be displayed at a time on the front page and are updated regularly. It also uses emails, a staff magazine, Diversity and Employment Law Newsletters, posters, plasma screens in the Library, notice boards and a reader bulletin that goes out to 40,000 readers (by email). It is recognised that the Library has a large amount of information to provide to staff and it is essential that this is accessible and available. For example, when the age legislation was introduced in 2006, details were posted to every member of staff; this included a bookmark which outlined the main points of the legislation.

Although electronic communication is widely used, other methods are also employed where staff do not have regular access to computers. This is particularly the case in the Retail company where the majority of staff are in customer facing or shop floor roles. In such cases, effective use is made of notice boards and regular staff meetings. In this organisation, keeping all colleagues fully informed is an important part of the organisational culture. For example, daily 'huddles' are held in the stores where any information or feedback is shared with colleagues and colleagues are given the opportunity to raise any issues they may have.

Awareness raising
Closely linked to the communication of equality and diversity issues is awareness raising. For most of the organisations, this relates to raising awareness in relation to particular equalities strands. However in the case of the Housing company, the focus is on equalities as a whole and a range of innovative methods is used to do this.

Box 5.2   Housing company: raising awareness about diversity

A particular emphasis has been placed on communication of the equalities message within the Housing company. The principal has been to keep persistently enforcing the message. 'We're great believers in the "bang on about it" theory. Just keep banging on about it and eventually the message will get in…People do get sick of us… but it has the desired effect' (Diversity Officer). Other means include contributions to the weekly e-newsletter 'What's new at the Housing company' as well as slots in the monthly company briefings (including the production of an Equality and Diversity video). The previous year the company held an Equality and Diversity Month in order to raise the profile. This consisted of a series of articles in the newsletter, briefings and training for staff. It included a desktop pop-up which displayed on people's PCs. Staff were invited to enter a competition to design an equality and diversity logo to be used on materials. The briefing sessions with over 600 staff included playing a giant game of 'Snakes and Ladders' which included practical equality and diversity scenarios that front line staff were likely to come up against in the course of their ordinary working day.

Across the organisations, there are a number of good practice examples in relation to raising awareness about the new strands. In the case of religion or belief, a number of organisations produced calendars outlining major religious festivals so that staff are made aware of these when organising meetings or other events. Both the Communications service provider and the Retail company have produced booklets which give employees and managers an insight into the many religions practiced by their colleagues and customers. In the case of the Communications service provider, the booklet also provided advice for line managers on striking a good balance between the needs of individuals and the needs of the company. This included taking time to pray, accommodating religious festivals, and balancing policies on uniform with religious requirements.

The University also made information available about different religions and festivals on their intranet and via the written 'Faith and Belief Guide' jointly published with the Chaplaincy. In the case of age discrimination, the Library had an innovative awareness raising programme at the time the age discrimination legislation was introduced.

Box 5.3   Library: raising awareness about age

The Library has made a number of organisational and policy changes in relation to the introduction of the age discrimination legislation.

The Library wanted to communicate to people about the cultural change that the age legislation brought and to make them more flexible and more open minded about how to manage the Library in the future. For example, a number of issues were discussed with staff including people remaining at work to older ages; how younger age groups would be managed; and how to integrate different age groups at work. The Library held HR exchanges where managers were invited to come along and hear about the age legislation and its benefits and to discuss concerns and share points of interest.

The Library also linked in with the EFA promotion and on 1 October 2006, a letter went out to every employee telling them what the regulations were, with a promotional bookmark and messages such as 'It's not just another phase we are going through, it's law', 'Age aware we are, are you?'. The bookmark was chosen because employees could keep it and it was also an appropriate item for a Library to hand out.

A key example in relation to raising awareness of sexual orientation issues was carried out by the Children's charity which implemented a campaign in relation to LGBT issues.

Box 5.4   Children's charity: increasing understanding and awareness of LGBT issues

A key initiative of the charity was their 'safe zones' which were set up to increase understanding and awareness of LGBT issues. In particular, it wanted to support managers to ensure that people recruited were supportive of LGBT issues. A 'safe zone' pack was made available across the service which took the form of a training toolkit. This toolkit involved raising awareness across teams, departments and services which led to the implementation of an action plan. Once this has been completed, the team, department or service are able to put up a 'safe-zone' poster to demonstrate that it is a safe area for LGBT staff. This scheme is complemented by a series of posters with positive images affirming sexuality.

5.2   Management support

This section examines the role of senior and line managers in the support, promotion and implementation of equality and diversity policies. It covers: the level of support from senior managers within organisations and the impact that this has; senior managers as role models; the importance of having equality strategies linked to other organisational initiatives; the role of line managers in implementing equality policy; and the role of equalities champions

Support from senior managers

Generally, organisations feel that it is essential to have support from managers at the most senior levels in order to pursue an equalities agenda effectively. Support from senior managers (and in particular the Chief Executive, or equivalent) is vital in order to set up and resource the structures that can take forward the equalities agenda. Support at this stage is considered important because it raises the profile of equalities in the organisation, making it more visible and more likely to be taken seriously by staff. One interviewee noted:

> Having such a high profile…sends out a very powerful message.
> (Director, Diversity and Equality Unit, University)

It is crucial that senior managers visibly communicate and champion the new equality strands, the benefits to the organisation and the need to tackle discriminatory forms of behaviour within the workplace.

Box 5.5   Housing company: the role of senior managers

A senior manager (formally in charge of Customer Relations) at the Housing company was credited by a number of other staff as having played a key role in driving forward the current equality and diversity agenda in the company through her interest, commitment and enthusiasm for the issues. Subsequently, key policies for LGBT staff generally related to staff support and consultation through formal structures (including particular LGBT Champions and LGBT staff networks), although awareness raising was important. However, there were some policies which LGBT people saw as key to developing an inclusive workplace. A committed, thorough approach from the top down rather than a lukewarm and piecemeal approach was important in conveying that the organisation was not just paying 'lipservice' to LGBT equality.

Senior managers could also have an important role to play as role models to other staff. LGBT role models and mentoring schemes which allowed LGBT staff to be

mentored by LGBT managers were identified as important to LGBT staff. So, for instance, openly gay staff at senior level are perceived to make it more acceptable for staff throughout the organisation to be 'out'. For instance, the Police raised the Rainbow flag recently (and for the first time) to mark Gay History Month.

Box 5.6   Police: senior managers as role models

The LGB Champion in the Police is an openly out lesbian at a senior level. The Champion made a particular effort to support and be seen to support gay events, such as running a joint recruiting campaign at Gay pride in the previous year. Not only was this perceived to show junior officers that it is acceptable to be openly gay, but it was also considered to send an important message to the community that the police understand these issues. Being a gay role model, she was also able to offer support to junior staff. As she noted: 'I do get phone calls and emails, and get approached by staff for support'.

In addition, senior managers were invited to give talks within the organisation about their experiences and strategies. For example, the Muslim People Network Group in the Communications service provider had run a number of such events.

Box 5.7   Communications service provider: Muslim network group

The Muslim network group ran training and development events for members. One recent event had been a talk by a senior Muslim manager about his career. This included:

- His career history
- The encouragement / barriers he had faced within the workplace
- How he had dealt with them
- How he practiced his religion within the workplace
- A discussion of the issues and how to tackle them

This had been helpful to those attending the meeting, specifically in showing them that religion or faith was not going to hinder them from progressing their careers within the company.

Where no senior role models existed (or were unwilling to identify with the new strands) within the organisation, it was possible to invite external senior managers to come in to the organisation to talk about their careers. This would encourage staff to

see that age, sexual orientation and / or religion or belief need not be a barrier to career progress.

The role of line managers

Line managers also need to be aware of equality issues and how these apply to the staff, teams and departments that they manage. For instance, line managers may be responsible for members of staff who are from a particular minority equality group and need to consider their particular needs. Line managers are also in the position of being able to challenge discriminatory remarks made by their staff and set an example to others about what is acceptable and what is not. Therefore, it is important to support line managers in their role through communication and training of policies and practice

Box 5.8   Housing company: role of line managers

At the Housing company, Equality Handbooks were produced on different equality strands, outlining relevant policy and practice and offering advice on acceptable and unacceptable language and behaviour. These documents, along with support provided by the Equality Team and the HR function, were viewed positively by line managers in helping them manage equality issues. For instance:

> I directly manage a disabled member of staff, so it's how we accommodate that into her work schedule as well as adaptation and support that she's required to do... that's about flexibility more than anything else and knowing where you stand as well. You can go and check where we actually stand on this which is helpful.
> (Line manager, Housing company)

A number of employees stressed the importance of line managers in turning equality policy into practice. Induction was an important point of introduction to the line manager and the organisation in terms of equality diversity policy and practice as one interviewee explained:

> The induction process is really conducted through your line manager when you first join…as a graduate...I had a meeting with my line manager when I very first joined…and she went through, you know, everything. And one of the things that she went through was how to self-declare and the fact that the [equality networks] existed.

However, despite that initial positive experience, in her view there were still line managers who although not anti LGBT:

> ... they wouldn't think of mentioning it... just generally making sure that it's obvious to their team members that if somebody happens to be gay that their line manager would be supportive of that…. because the most influential person in an employee's life is their line manager and that's where they are going to get most of their communications and the messages and the perception of the company from… I think sometimes we target too much at the higher level and it's all very good that the very senior managers are talking the right talk but it's not making the way down so there is this middle layer that we need to try and reach.

Failure to do this could be problematic for the organisation as well as to individuals, in that where managers did not feel comfortable in talking about aspects of equality and diversity, then the individual was less likely to 'bond' with the organisation. (Member of LGBT network group, Communications service provider). This reticence to talk about the sexual orientation strand was noted in other organisations. As a consequence, the LGBT groups in the Local Authority had asked for training for managers to raise understanding and awareness as there was thought to be less understanding and possibly acceptance for the sexual orientation strand. This meant that policy in relation to this strand was not always translated into practice.

Equality and diversity champions

Some organisations had a system of diversity champions (in some organisations these were the chairs of staff forums and not referred to as champions, although they effectively fulfilled the same role). These would be responsible for a particular equality area, and often chair a formal forum relating to the particular equality strand. These champions were generally drawn from senior management level, and their role was to 'champion' that particular equality in order to raise the profile of these issues. These roles were strategic, so champions would aim to affect policy and practice through representing issues relating to the particular equality group at senior level. The role of the champion was also affected by the interest, commitment and resources of the individual appointed. This means that, in many organisations, not all the equality strands would have champions.

Champions were appointed through either volunteering themselves or through being nominated by the Chief Executive / Board or equivalent. One organisation (the Police) sought volunteers, where possible, who had an interest in the equality strand they would be championing. For instance, the disability champion had a disabled

child and the LGB Champion was an out lesbian. The purpose of this policy was to have somebody with an interest and understanding of the issues, as well as being able to act as a role model where appropriate. In the Library, the diversity champions (they had champions for diversity in employment, race, gender and disability) were executive directors who had a strong interest in those particular areas. In this case, having commitment from the top of the organisation was seen as vital in getting equality and diversity issues taken seriously and keeping them in a high profile for strategic and funding purposes. A further organisation, the University, deliberately sought to appoint champions who did not belong to the equality group they were representing, in order to avoid perceived 'special pleading'. However, the ability of some champions in larger organisations to drive forward the specific equality agenda may be hampered by the need to cascade downwards to lower levels. At the Company service provider, there was:

> No rule. But it's about the passion and the interest and the willingness to give time that you put forward.
> (Head of People Practices, Communications service provider)

The Communications service provider saw a solution to this through the appointment of 'Diversity Ambassadors'. These worked at lower levels within the organisation and sought to engage fellow employees with diversity and equality matters, for example by assisting in running training events in the workplace.

The Children's charity was keen for champions (or in their case the chairs or the forums) to come from all levels of the organisation. This was to demonstrate to staff that all members of staff were able to be champions and to have representation from all levels of the organisation. However, one barrier to this was that those at more senior levels were more able to be champions as they had greater flexibility to manage their own time. By contrast, ordinary workers found it more difficult to manage their own workload so they could attend meetings.

5.3   Staff equality networks

All of the organisations, save one, operated equality staff networks. Separate equality networks existed for disabled, LGBT, women, race and ethnic minority, religion or belief and, in two organisations, for younger workers. The purpose of the networks varied between organisations and between networks. Various functions included providing support for staff, increasing understanding of issues and contributing to the diversity agenda in relation to the particular equality strand. On the whole, staff networks tended to focus on the staff support element through: regular meetings, social events, annual conferences, peer support, mentoring and sharing information

on relevant issues. However, they also provided a forum that represented the views of the equality group which could be presented at higher level equality forums, and therefore feed into strategy and policy development. However, communication and raising understanding of issues, as well as contributing to the diversity agenda within the organisation was generally more likely to be undertaken by specialist equality and diversity units and / or equality champions. In the case of the Children's charity, each of the staff forums had representatives on the corporate equalities board.

There were variations between staff networks in how they operated depending on the equality strand they were concerned with. Most organisations had an LGBT network group and in half of the organisations, these had been established in response to staff pressure prior to the introduction of the Employment Equality (Sexual Orientation) Regulations, in some cases with the assistance of an already existing trade union LGBT group. Network groups for the other two 'new' strands were more likely to have been established following the introduction of the recent equality legislation. Where employee network groups were established, it was important that there was agreement and clarity about their terms of reference.

LGBT equality network groups

LGBT staff networks were considered by LGBT employees as a key indicator of an organisation's willingness to be inclusive of LGBT staff. The group might be the only place in an organisation where LGBT staff felt able to be 'out' and be 'themselves.' As many LGBT staff do not 'come out' at work, not all LGBT networks were open to all employees because they were concerned to ensure the confidentiality of membership. Various methods were employed such as: members signing confidentiality statements declaring not to disclose any personal information shared at meetings; having meetings outside the workplace; having meetings at lunchtime so that staff would not have to ask permission of managers to take time off to attend; confidential emails. In addition, LGBT intranet sites were established so that LGBT staff who were not 'out', and so would not attend meetings, could access information and request advice and / or input their views via a confidential LGBT support telephone helpline, email or, where available, participate in online conference events. In practice, however, most staff who participated were already 'out'. There were examples of LGBT employees who came out more widely in the organisation as a result of the confidence gained through participation in the LGBT staff network. There also tended to be a small group of 'core' members who regularly attended meetings, and then a larger group who were involved on the periphery, for instance, they were on mailing lists to receive information or were registered with the network intranet site, but who did not generally attend meetings.

It was recognised that gaining membership from, and meeting the needs of, a diverse group of people (lesbian, gay, bisexual and transgender) was difficult. Moreover, including those from frontline, administrative and manual areas, who had more difficulty obtaining time off to attend meetings, plus groups such as black and ethnic minority LGBT people who may be less likely to be 'out' at work, was even more difficult. One way of addressing this was via more targeted information on LGBT network intranet sites to reach under-represented groups. For example, on the Communications service provider LGBT website, there was an area of the forum that was devoted to women although not exclusive to them:

> The importance of it really is that in most LGBT networks and groups you tend to find that there are more gay men than women and particularly in this company where 77 per cent of our workforce is men, you would expect that it would lean more heavily towards gay men than anything else. So it's just basically about saying women have slightly different needs, women would like to know each other and form a sub-group of support and recognition.
> (Member of LGBT network group)

LGBT employee networks, in addition to liaising internally within the organisation, also did so externally. For example, the Communications service provider LGBT group had helped to establish regional LGBT groups with other companies and organisations such as for example the Midlands LGBT network and the Northern Employees Organisational Network. These regional groups provided information on how to deal with LGBT issues and shared ideas, training, mentoring and good practice with other LGBT employee organisations and support groups. These included the police, local councils and a range of private sector organisations including smaller companies which did not possess networks, but wanted to be involved in order to learn about LGBT issues and good practice (Member of LGBT network group, Communications service provider).

Religion or belief equality network groups
A number of organisations were in the process of establishing network groups on the grounds of religion or belief. Some organisations were concerned that if each religious group had its own staff network as one respondent put it: 'where would it end'. Another view was that having separate faith groups willing to work together where appropriate could be positive because 'each faith has its own goals' (Communications service provider).

Most organisations that had established a group had opted for an interfaith group. One was attempting to set up an Interfaith Network, but had experienced difficulties attracting members of religious groups other than Christians (mainly through lack of staff from other groups). They were also in the process of identifying the aim and purpose of the network, but since the network was made up of relatively senior staff, it was more focused on how religion or belief issues affect customers and the business than as a staff support network. The Local Authority had also decided to establish an interfaith staff forum to act as a reference group for consultation on prayer / reflection space and interfaith issues and events. The interfaith forum in the charity had recently been re-established (after a period of inactivity) but had a clearer vision of what it wanted to achieve despite having a small membership. Previous meetings had focused on individuals sharing aspects of their faith, but there was recognition that the focus should be on how the forum can help the organisation. Key areas identified were working towards making all faiths welcome in the organisation; making it safe to talk about issues of faith but at the same time not encouraging oppressive or offensive views; and examining if certain faith groups are under-represented in the organisation (this was being done through the staff survey).

The Communications service provider as a large global company had the most developed and well resourced equality employee networks. It had had some form of Christian network for over 100 years and had developed policy to support employees coming together as a group to reflect a community via employee networks. In 2009, it had 10 employee networks and in addition to employee groups for women, ethnic minorities, LGBT and disabled employees and one covering religion or belief, it had employee networks which did not necessarily reflect a diversity strand (for example Secretaries, Apprentice and Graduate Networks). Where a group wished to form an employee network, then it was required to make a business case to do so. It needed to be:

> ... a recognised voice for a minority group…be democratically managed
> via an elected chair and an elected committee, be open to all and as well
> as providing a benefit to that group there needs to be a business benefit to
> the organisation.
> (Head of People Practices, Communications service provider)

Through this route, employees had successfully established an LGBT employee group in 2001, a Christian employee group in 2005, a Muslim employee group in 2005 and an apprentice group in 2006. In addition, a few employees had begun to make initial enquiries about establishing a Humanist group. All of the organisation network groups were open to all employees on the grounds that as open networks

they promoted 'integration' and could be a company 'resource' in assisting employees and managers gain a broader understanding of diversity (Member of Muslim network, Communications service provider). Once formally recognised, the networks were provided with a budget, staff time for the chair, and were allowed to have an annual event and to be represented on various company bodies. In return, the organisation benefited in a number of ways not only from the support and developmental activities they ran for members but by consulting them on policies, practice, products and services. For example, the network chairs met monthly or had conference calls to discuss a range of initiatives jointly with equality / diversity staff, including HR matters such as the introduction of a new performance management system, guidance materials etc.

Box 5.9   Communications service provider: Christian employee group

Membership was open to all employees and the group had 1,120 members in 15 countries. It had an elected leadership team, an information and social networking website, newsletter, conference calls, an organised annual event and in the UK each work location had a key contact to organise local events. The leadership team had been trained by HR and it included a chair, a personnel secretary to keep the members database up to date, the Deputy Chair who was responsible for liaising with the company on policy issues and a pastoral team to talk to anyone with an issue. However, the group did not undertake counselling although it could advise who to contact should the person wish to get official counselling. It had established local groups to support each other in things they might wish to do with a leadership team who coordinates everything. The company also consulted the network for feedback when launching a product in terms of its potential impact on Christians.

The Muslim network was structured and resourced in a similar way and, as in the case of the Christian network, its members were keen to emphasise the benefits that it provided both to the individual and the organisation. In that organisation, equality network groups thus operated as an organisation resource. Where appropriate, they would work together, for example organising road-shows and diversity days to increase awareness more broadly across the organisation.

Age equality network groups
The research did not identify staff networks for older workers. The Children's charity in Wales had a network for younger workers (under 25) and the Communications service provider had two network groups which included younger workers, an apprentice network and a graduate network. The apprentice network included

younger workers, in particular, and was started by apprentices to provide support and networking opportunities.

Box 5.10 Communications service provider: apprentice network group

The group had an organising committee which included a representative for four equality strands, gender, sexual orientation, ethnicity and disability. These were contacts within the apprentice network in cases of specific issues such as bullying and harassment but also liaised with their counterparts in the women's, LGBT etc equality networks, where appropriate. It had a website, a monthly newsletter and a range of events which could be subscribed to via e-response online. Company managers at all levels had been very positive about the establishment of the apprentice network and keen to interact with the apprentices who they saw as the 'fresh future of the company'. It had set up a number of networking opportunities to develop confidence and knowledge about the company. This included 'Luncheon Learners' whereby 10 apprentices would meet with a senior executive to have an informal lunch with each other and discuss issues inside or outside of business such as careers, professional or personal. In addition, it ran a yearly 'What Next' event, which addressed 'what next after your apprenticeship, where can you go, what can you do, what jobs are out there'.
(Apprentice network)

5.4   Monitoring and reviewing workplace policy and practice

Throughout the organisations equality and diversity issues were monitored using standard methods such as equal opportunities forms at recruitment stage, internal benchmarking, staff surveys, exit surveys and progress reviews. In order to achieve consistency with other employers and government statistics, be able to benchmark and use a common language, organisations used categories as defined by the Census or a recognised authority benchmarking such as those provided by the Employers Forum on Age, Employers Forum on Belief and Stonewall.

Staff surveys were widely used by the case study organisations as a means of obtaining feedback on equalities and diversity as well as other organisational issues. There was variation in how often staff surveys were carried out, from biannually to every two years. In addition to gathering responses to equality and diversity issues, staff surveys were also used to monitor responses by equality strands and demographic groups. However, this was only possible when information on equality group membership was disclosed by staff completing the surveys. Given the issues around disclosure for some equalities groups (particularly LGBT, religion or belief and disability), it was not always possible to get an accurate picture. One

organisation had yet to ask for details in relation to sexual orientation and religion or belief, fearing staff would not be confident enough to disclose them. However, where there were strong policies in organisations in relation to sexual orientation, for example, staff were more likely to identify themselves as belonging to the LGBT group in staff surveys.

In addition to the main staff survey, the case study organisations carried out ad hoc smaller surveys in relation to specific issues through mini-surveys, staff focus groups, or listening groups. This was particularly important in increasing the visibility of the LGBT group and LGBT issues, given it is probably the most 'invisible' equality group as there are no Census, national or regional survey data on sexual orientation. These surveys were not simply used to collect information, but were also used as a basis of action plans to demonstrate to staff that filling out the survey would have an impact. However, where response rates to staff surveys were low it was difficult to base action on the survey results, as they could not be relied on as being representative.

Statistical and numerical analysis is widely used in the monitoring of staff, for example the proportions of staff from each equalities group (where information is available) throughout the organisation. This was most readily carried out in relation to age, gender and race. Monitoring using the other strands was increasing but found to be problematic due to the sensitivity of the information collected. The Communications service provider company was fortunate in having an online people system which allowed all employees to update / revise their own personal data online. This was viewed very positively by employees who felt that data were secure and that monitoring was done confidentially and without any element of compulsion. In 2007, it had written to all employees asking them to update their personal details and inviting them to provide information on sexual orientation and religion or belief. Thus far, it had achieved a declaration rate of 100 per cent on age, 85 per cent on ethnicity and, after two years, 22 per cent for sexual orientation and 22 per cent for religion or belief. The LGBT, Christian and Muslim network groups were working with HR to improve self-declaration through helping their members to understand the benefits of registering their details.

For the Communications service provider and the Local Authority, it was important that monitoring was seen as about delivering something effectively and not just monitoring. For example, in the Local Authority, when the organisation first did equality impact assessments in 2002, there was commitment from political and senior management of the organisation to the inclusion of all six strands. Formal monitoring across all these strands started in 2006 and in 2009, the organisation had begun to report on recruitment, applications, progression, grievances and disciplinary

cases, again across all these strands. While it was acknowledged that self-declaration levels varied across strands and that there were ongoing challenges in improving that, the organisation view was that it was important that 'the message' coming 'from the top' was that equality monitoring across all six strands was a 'tool for improvement' which needed to be 'embedded in thinking and practice.' (Head of Scrutiny and Equality, Local Authority). The Equality and Diversity Unit, HR and staff forums were developing initiatives to create an 'inclusive culture,' encourage declaration rates and provide guidance to staff and residents on equality monitoring. One major communication initiative had been the production of *Equalities Monitoring Guidance* (Diversity and Equalities, 2008) to explain the authority's reasons for monitoring, assist managers to undertake equalities monitoring of services and employment practices and highlight issues which might arise. These guidelines were on the organisation's intranet pages. In addition, in response to employee concerns about collecting monitoring data from service users, a postcard had been produced for Local Authority residents to explain monitoring across the six strands and assist staff in collecting the data as an integral part of the way the Local Authority worked in both employment and service delivery.

5.5   Recruitment and retention

Recruitment and retention was seen as a key area for the implementation of good practice by the organisations. For example, equality and diversity policies and practices were identified as key in recruitment and retention in a number of ways. Respondents suggested that information on these, as well as on equality employee network groups, on the organisation's website and / or in induction packs had been a very positive and inclusive signal that when they applied to work in the organisation their religion or belief and / or their sexual orientation would be welcome.

Box 5.11 Communications service provider: induction packs

'I was absolutely delighted when I applied to [the company] and they sent me an information pack saying if you are successful, these are the things that would be available to you and one of them was the LGBT network… I couldn't believe that there was actually a network specifically for LGBT people at [the company]. And I was overjoyed... it said that I was definitely going to be accepted as an out LGBT person… that would have been one of my main concerns and that was just done away completely as soon as I saw there was a network for me.'
(LGBT employee network group)

Another employee suggested that working for a 'leading edge company' included for him a clear commitment to equality and diversity. This would make an organisation an 'employer of choice' for him as a younger worker:

> I suppose from an age perspective. It's key for me because I am trying to progress my career as fast as I can and as far as I can, for me if it was a case of promotions were based on age or length of service it wouldn't be a company I'd be interested in working for. Skills and competencies is what I want promotions to be based on and not age.
> (Employee, age apprenticeship network, Communications service provider)

The monitoring of recruitment of staff by equality group was carried out by all organisations. All of the organisations wanted their staff to reflect the diversity of the population as a whole but also in the context of the local communities in which they were based. In the case of one organisation which had regional offices throughout the UK, their targets in relation to race were in the context of the local population rather than the UK as a whole.

In the Local Authority, based on a declaration rate for religion or belief of 64 per cent, it was found that the proportion of Christians and Muslims in the workforce was similar to the proportion in the local working age population. However, the proportion of people of no belief was lower at 10 per cent than the comparable borough figure of 18 per cent (figures relating to other faith groups were too small to draw conclusive comparisons). The data were beginning to be useful in the organisation in raising some questions about variations by faith groups at higher levels of the organisation (Religion / Belief Equality Scheme 2009-2012).

The levels of retention varied across the organisations. This could be expected as they are drawn from a diverse range of sectors, for example the retail sector is known to have far higher rates of turnover than sections of the public sector. However, equality and diversity policy and practice was again flagged by employees who suggested that:

> ... the biggest thing is in terms of retention. I cannot envisage myself working for any other company that doesn't have the policies, procedures, and kind of group of networks that [this company] has… because it's integrating my religion and it allows me to be who I am at home as well as at work, yeah, it is a way of life.
> (Muslim employee network member, Communications service provider)

5.6 Training and development

Training and development in equality and diversity is viewed as important across the case study organisations, in particular in ensuring that staff are fully aware of policies and legislation.

For most organisations, the primary means for delivering diversity training was in the induction process. There was variation between organisations in the length and delivery of training. All the organisations have mandatory training in equalities. Training for managers and staff tended to be the same, although in some organisations, managers received additional training relating to managing equalities generally or in relation to specific functions (such as interviewing for recruitment). In the Police, all staff underwent at least three days of training, with managers additionally being trained for a further two days in managing equalities. This was considered essential, although training of all staff had taken four years to complete. Further refresher sessions for all staff are currently being planned.

Further training is also usually given to all staff when there are changes to the legislation. There was some debate about whether generic or strand specific training was the most appropriate way forward. The Local Authority offered both. The corporate learning and development programme included a wide range of diversity and equality training which covered all six strands. However, it also offered specific training as appropriate. The LGBT Staff Forum had requested sexuality awareness training on the grounds that middle managers and employees seemed to be having particular difficulty with this strand.

Within the Communications service provider, in addition to team briefings and compulsory online training packages, an in-house diversity training programme had been rolled out to 40,000 staff in the engineering division.

Equality networks could also run training and network events for their members on a range of topics. For example, the Communications service provider Muslim network group had run a one day conference for its members on 'Islam in the workplace and how religious and work values can co-exist', which focused on the company's values.

Some organisations had established positive action training for under-represented groups. For example, the Local Authority ran youth training schemes for local residents aged between 16 and 24. It emphasised the importance of having a workforce that reflected the age of the community it served and had identified that despite having a 'young' population in 2009, only 7 per cent of its workforce was under 25, with 14 per cent being over 55 years of age. This had also encouraged it to

establish development schemes which were predominantly trying to address progression amongst ethnic minority staff as vertical job segregation had been a key issue within the organisation. Although, 60 / 70 per cent of places on these development courses went to ethnic minority staff, there was capacity for other minority groups so, for example, the scheme had been advertised to LGBT staff via the LGBT Forum mailing list.

Promotion by equalities groups was monitored by some of the organisations (and others had plans to introduce monitoring in the future). Promotion through the organisation by particular equalities groups was an issue raised by a number of organisations. There was a sense that although progress had been made in the recruitment of equalities groups, this had not been even throughout all parts of the organisation. The top levels still tended to be male dominated and predominantly white. In a number of organisations succession planning was used to encourage and support those lower down in the organisation.

In the Retail company, monitoring systems were used to assist succession planning. Through this process, the organisation was able to identify particular equalities groups in the organisation and, where appropriate, offer them developmental opportunities. This was to give active encouragement to certain groups (in particular women, ethnic minorities and disabled people) rather than an indication of positive discrimination (which is not permitted by law).

5.7 Flexible working and facilities

Flexible working can be an important way in which the needs of different equality groups can be met. For instance, part-time and flexible working can be particularly attractive to older workers who no longer wish to work full-time or have caring responsibilities. Flexibility to take time off at a time of an individual's choosing can help them fulfil religious obligations and attend religious festivals. Research has shown that many religion or belief issues have tended to be focused on indirect discrimination and the practical issues in accommodating religious observance (Acas, 2009). All of the case study organisations that took part in the research had a range of flexible working practices in place.

Box 5.12 Retail company: flexible working packages

The large retail company has a wide range of flexible working packages that are available to all members of staff. Flexible work packages include a shift swapping scheme, grandparent's leave, carers leave, career breaks and emergency leave. In relation to religion or belief, employees are able to take time off for religious festivals (these are often celebrated in store which has the additional benefit of increasing staff awareness of religious festivals) and additionally staff are able to take unpaid leave for religious pilgrimages. All staff are entitled to apply for this type of extended leave and it need not be for religious reasons, it was stated that it was equally legitimate for a member of staff to take extended leave to visit relatives in Australia, for example.

A number of employees interviewed during the course of the research noted that the provision of flexible working enabled them to combine work with caring roles. This is particularly the case for the older workers interviewed, many of whom stated that flexible working made it possible for them to continue as a carer or to cut their hours as they approach retirement.

Box 5.13 Communications service provider: flexible working

One woman who had opted to work beyond 60 was clear that she 'was no less capable the day after she was sixty than the day before she was sixty' and 'was over the moon' when she was able to continue working with no leaving date when the company stopped having a fixed retirement age in 2005. She enjoyed working, being productive and useful and getting paid as well, particularly as she was still supporting one of her sons and his children. She said she didn't 'feel ready to retire…or old enough to retire in my mind', but was clear that if she wasn't managing the job well she wouldn't stay on as her 'pride' wouldn't let her. In addition, as she was the primary carer for a parent aged over 90 who had failing sight, her line manager had offered her the option of home working. She had opted for occasional home working so the company had installed an internet connection, a portable computer and office furniture in her parent's house allowing her to work from there if at particular times this was necessary. This flexibility allowed her to combine work and caring responsibilities and provided her with considerable peace of mind.

The nature of the business of the University allows a certain degree of informal flexibility particularly among academic staff. Academic staff enjoy a high level of trust in determining when and where they work. They are expected to get their work done with the minimum of supervision. For instance, working from home is allowed. This

makes it easier for staff to manage outside activities, such as prayers and religious festivals that fall outside the Christian calendar of the public University holidays. However, some other jobs offer less flexibility due to the nature of the tasks, so 'the ability of a secretary to work at home during public holidays is much more limited', since his or her work cannot easily be completed at home.

Flexible working policies and practices are an important way in which staff can balance work and religious observance. The University has a formal policy allowing staff to take time off for religious festivals. The large Retail company offers a formal entitlement to leave for religious reasons. In order to mitigate any tensions between religious and non-religious staff, the company has a policy where all 'colleagues' can take off (unpaid leave) for religious pilgrimages and all staff are entitled to apply for unpaid extended leave which is not granted solely for religious reasons. In this way it ensures that there is equity in the distribution of such benefits which is central to the ethos of the company of treating all staff fairly. Within the Local Authority, a briefing for managers had been prepared which stated that during Ramadan:

> ... these are the arrangements, this is what you can allow, this is what you can't allow. It goes out on the internet and out in a briefing for managers. (Diversity and Equality Co-ordinator, Local Authority)

In addition to flexible working practices a number of organisations make provision to take account of the needs of members of new equality strands. This included providing facilities for prayers and providing Halal meat, kosher food and vegetarian options in staff / public canteens. The Library has a quiet room which is available for use by all faiths and by people of no faith. It has found that the room is used throughout the day by a range of staff of different faiths and of no faith (who use the room for quiet contemplation or meditation) and who gain personally from this facility. This was also true in the Communications service provider which preferred to use the term 'quiet' on the grounds that a number of people may wish to go to a room and be quiet and be respectful whereas 'prayer' infers you have to pray and 'faith' that you have to have a faith. The University has a Chaplaincy open to students and staff. A number of other organisations stated that they were open to the idea of having prayer rooms / quiet rooms but were unable to do so because of restrictions on space or because their offices were spread over a number of sites.

5.8 Challenging discrimination and harassment

Organisations recognised the importance of including and stating 'age, religion or belief and sexual orientation' alongside other grounds in their grievance, disciplinary, bullying and harassment policy, procedure and training. It was important to raise

awareness of discriminatory attitudes and behaviour in respect to these grounds and create a 'zero tolerance' culture for these strands in addition to the others within the workplace. Research has shown that sexual orientation issues in particular are often focused on the need to challenge prejudice and discrimination in relation to LGBT people and to deal with the inappropriate behaviour, discrimination and harassment that may arise (Dickens et al, 2009). Monitoring data remain limited thus far but there is evidence that homophobic attitudes and behaviour pose a particular problem in UK workplaces. The Gay British Crime survey conducted by Stonewall (2008) found that one in 10 respondents was a victim of an incident committed by a work colleague. The Local Authority had conducted a survey and found that 27 per cent of respondents said that they had experienced harassment or discrimination at work because of their sexual orientation. Of these, 62 per cent had experienced homophobic jokes, 41 per cent said that they had been ignored because of their sexuality and 38 per cent had experienced verbal abuse (Sexual Orientation Equality Scheme 2009-2012).

Box 5.14 Local Authority: celebrating diversity and challenging discrimination

The Local Authority had decided it was important to adopt a 'celebrate diversity and promote cohesion' approach to equalities work ensuring all six strands were central to policy, practice and implementation (Sexual Orientation Scheme 2009-2012). A key area of work was creating an inclusive culture and tackling hate-crime across all equality strands. The Local Authority has developed a communication campaign 'No Place for Hate' and 'Don't Hate, Celebrate' which was described as 'huge' in helping develop cohesion and was relevant to a range of initiatives in the borough. It had provided a unifying campaign allowing employees and residents to 'empathise around homophobia and related to racism and sexism etc' (Diversity and Equality Co-ordinator). The campaign was ongoing with input from the inter-faith and LGBT residents forums plus Local Authority employee equality groups with a range of local authority and other agencies including the police. The Local Authority celebrated a range of community, cultural and equalities events including Black History Month and LGBT History Month utilising slightly adapted versions of this message.

Working in an LGBT friendly working environment made a big difference to LGBT employees. One employee compared his current workplace favourably relative to other places he had worked:

Because I never had any support from anywhere else in me other jobs…
like this, the networks… support with equality and diversity as well… I've
never had that in any of the other jobs… The blokes that I work with came
to my marriage [civil partnership] as well… When I first started… the job
that I was coming into was a very straight male orientated environment,
with engineers and… I was scared of working in that environment and
being able to be 'me' and it was just made very easy for me to be myself
with the people I work with.
(LGBT employee, Communications service provider)

Both male and female heterosexual employees talked positively about working in an
atmosphere which was 'inclusive' of people regardless of sexual orientation:

I know at least five or six openly homosexual people and they are quite
open in talking about it, expressing their views... some companies I think if
they had that mindset of homophobia you wouldn't get that openness.
People... they'd be quite sheltered in themselves and they wouldn't be as
open and as free and as relaxed, they'd be on edge all the time at work.
(Line manager, Communications service provider)

Organisations recognised that it was important to develop knowledge and
understanding and promote respect for different ways of life in addition to challenging
prejudice and discrimination on grounds of age, sexual orientation, religion or belief.
The development of Equality Schemes had required public sector organisations to
adopt a range of monitoring and consultative measures with employees,
stakeholders and service users. In the Local Authority, the organisation had collected
data on representation by religion or belief for 64 per cent of its employees, but had
no data on representation by religion / belief for 26 per cent of staff and a further 10
per cent had declined to provide the information when asked. However,
supplementary data had been acquired via a consultation exercise on religion and
belief with the workforce, as detailed in Box 5.15.

Box 5.15 Local Authority: religion or belief consultation with staff

This consultation revealed a variety of opinions about the way in which religion / belief should be regarded in the workplace. There was a strong feeling that the workplace played an important role in bringing people of different backgrounds together to build positive relationships and many people stated their willingness to help colleagues to understand their religion or belief. However, participants also identified some factors which they felt had a detrimental affect on their ability to be open about their own religion or belief in the workplace which included: world events which lead to a negative portrayal of certain faith communities in the media; the use of language which was offensive to some faith communities in the workplace and; a feeling that some faith groups got more publicity / resources than others. There was support for more interfaith events as well as an interfaith group in the organisation as these provided opportunities for staff to learn about the variety of religions / beliefs in the borough in a well managed, safe environment (Religion / Belief Equality Scheme (2009-2012).

Within the Communications service provider, attitudes on age had also changed with one apprentice describing starting his apprenticeship in a section where the average age was 50. His family had warned him when he started work to be prepared to be the:

> ... 'Tea boy' because you are the apprentice… But when I joined I found that it was completely different… I was treated as an equal in the office, you know. For a team which is such an 'old school', they'd adapted themselves, you know, and I wasn't spoken down to, I was made to feel like part of the team.
> (Employee, Communications service provider)

5.9 Retirement and pensions

The provision of flexible retirement options and pensions in some of the organisations meant that many older workers felt supported in work as they neared retirement. The Communications service provider, Library and the Retail company all had schemes which were able to facilitate flexible retirement options for their employees.

Box 5.16 Retail company: eliminating retirement age

The Retail company does not have a set retirement age, colleagues have the right to continue working until whatever age they choose. Colleagues do not need to leave when they reach 65 nor do they need to change their hours or duties once past this age. Around 2,300 colleagues work beyond state pension age. In addition, older workers can be offered lighter duties if needed, but it has been found that many are happy to remain doing heavier work (the switch to lighter duties is available to all staff based on need).

The Communications service provider stopped having a fixed retirement age in 2005 and ensured that all policies were age neutral. It introduced flexible retirement options allowing people to 'Wind down, step down, time out, be helping hands and ease down' and held Career / Life planning training events to provide advice and guidance to assist employees making decisions about retirement. Thus far of 86,500 employees in the UK, 1,450 employees had opted to continue in work after having reached the pensionable age of 60. The Communications service provider offers a range of flexible working options with 15.7 per cent of employees opting to be 'home workers' and 81.5 per cent working flexibly which could be useful options for those with caring responsibilities.

Although the Local Authority had a procedure in place for employees to request to work beyond the age of 65, its consultation in the preparation of the Age Equality Scheme indicated that more promotion of the retention of staff beyond the age of 65 was needed given that just one per cent of the workforce was over the age of 65 (Age Equality Scheme, 2009-2012).

The Library's pension scheme was altered in order to facilitate partial retirement without detriment to the income that employees would receive when they retired. Previously it was not possible to go part-time without this having a negative effect on the final pension provision. The real alternatives before this were thus to stay in work full-time or to leave. The facility is now there if people want a flexible retirement.

Retirement and pension provision is an example of an area that can be seen to link with other equality strands. For example, it was a source of pride in a few of the organisations that they had been 'ahead of the game' when it came to LGBT benefits. For example, the Communications service provider had long provided benefits to both heterosexual and same-sex couples, including survivor pensions for same sex partners since 1980. In other organisations, policies had been audited before or shortly after the Employment Equality (SO) Regulations to ensure equal opportunities

in policy and practice. These changes were viewed very positively by LGBT respondents.

In addition, the Communications service provider has gone through a major consultation for their pension programme and retirement scheme and in response to a request from the Muslim network has introduced an ethical or Sharia compliant pension scheme. As part of the consultation, the Muslim network surveyed its members and found that a number did not invest in the company pension scheme because they did not know where their money was being invested. The company pension scheme now comprises a list of funds, including the Sharia compliant pension scheme, that any member of the Communications service provider can invest in.

5.10 Company performance

The inclusion of equality and diversity policies were seen as important to all the case study organisations for a number of reasons. For private sector organisations, there was a clear association between strong diversity policies and attracting and maintaining staff and customers. For public and voluntary sector organisations, there was a strong obligation as service providers to demonstrate that they were a diverse organisation. For example in the case of the Children's charity, support for LGBT issues was important for their staff and their services to children as some of the children and young adults they supported were from LGBT families, or were members of LGBT groups themselves. However, actual evidence of the impact of equalities on company performance was limited. The evidence that was available tended to be anecdotal.

Making the equality strategy integral to other initiatives in the organisation can help to ensure that these issues have a high profile and are more likely to result in action. Most organisations listed equalities as an important issue in their organisation-wide strategic planning statements making links with employment and service provision. At the Housing company, the addition of equality and diversity issues to the Group Corporate Plan for 2008-2010 was perceived as an important boost to their ability to promote the agenda effectively:

> We can now say 'it's in the Corporate Plan, you need to do this
> (Equality and Diversity Officer, Housing company)

Box 5.17 Police: integration of equalities

A concern with diversity and equality is built into the Police at every level. More recently, addressing equality issues has been made a requirement of Departmental Heads in financial planning. Heads now have to consider equality issues and their implications and evidence this in their financial planning statements for the forthcoming year. As part of their performance reviews, senior and middle managers are required to complete comprehensive forms detailing how they deal with equality and diversity issues in their areas

The Communications service provider had a performance management system which incorporated equality and diversity. This also permitted equality network members to include their network and equality diversity activities as objectives as part of the scheme. As one LGBT employee said:

> I am gay for pay. That's the way that I phrased this in our recent event…
> at manager level you have objectives that you set yourself for the year and
> they influenced your bonus… one of the things that I have selected in
> amongst my five is my work on LGBT stuff… So one of the things that I
> am rated on is that… they value it and I am required to produce evidence.
> (LGBT network member, Communications service provider)

Within the Communications service provider, the company was perceived to derive a number of internal and external business benefits from its equality network groups:

> First of all because I think we have a good company and a good HR team
> who are very inclusive of people but secondly the benefits to business.
> The benefits will be that external companies and investors will see that
> [the company] is inclusive so for example, if you are working in that market
> and you are Christian, they are much more likely to invest.
> (Christian network member, Communications service provider)

5.11 Conclusion / summary

This chapter examined the ways in which organisational practices were used to implement equality and diversity across the case studies. Some of the practices were used across all equalities strands but there was variation in the degree to which the practices were used to implement the new strands.

Communication and raising awareness were particularly important in relation to the new strands. A number of organisations used innovative methods to raise awareness

about the new strands that were seen as being very effective. Although it should be noted that organisations varied in which strands were promoted.

Support from management throughout the organisations was seen as important in raising the profile of equalities issues. Managers were also seen as important role models in the promotion of equalities by demonstrating to their staff the central role of equalities issues in the workplace. Equalities champions also played a similar role, although not all organisations had a champion for all strands which meant some equalities groups did not have the same representation as others.

Equalities networks provided an important source of support for staff in addition to their role in awareness raising. Again there was variation in the degree to which the various strands were represented by equalities networks. Those networks that tended to be the most effective were those that had been in operation for some time and had support / representation from the highest levels of management. There were fewer networks for religion or belief, or age and this was partly explained by the fact that there was a perceived lack of commonality between these groups (although this was something that was trying to be addressed by some of the newer faith networks).

Monitoring of equalities was widely used across all organisations and most commonly at the recruitment stage and through staff surveys. Although the organisations collected a large amount of information in relation to equalities it was recognised that there was a lack of information relating to sexual orientation and religion or belief.

Equalities issues were effectively implemented in the area of recruitment and selection. All potential staff were given full information on their organisation's equalities policies and flexible working policies in their application packs. Many organisations also provided information on staff networks.

Training and development in equalities was a key element in the induction process with further training tending to be given with any changes in legislation. Some of the equality networks also ran their own training events.

Flexible working was shown to be an important means of supporting the needs of equalities groups. Of particular importance in relation to the new strands was time off for religious observance, time off for caring and provisions for flexible retirement. Also important in a number of organisations was the provision of prayer rooms or quiet rooms.

A number of organisations had introduced flexible retirement schemes and made changes to pension entitlement. This meant that older workers could reduce their hours or work past retirement age without detriment to their pension. One organisation had introduced pension entitlement for LGBT staff partners and Sharia pensions for Muslim staff.

Overall across the case study organisations, equalities were seen as having a positive effect on company performance whether this was through attracting and retaining staff, increasing profits or providing a better service to clients as a service provider.

From this examination of practices across the organisations, it was clear that there were a number of good practice examples across the organisations. However, there was variation in the degree to which these practices were being implemented in relation to each of the strands.

6. Conclusions

This report has brought together information on workplace good practice in relation to the equality strands of age, sexual orientation and religion or belief. Firstly, a review of good practice literature pulled together existing material. Secondly, case studies were carried out in eight diverse 'good practice' organisations across Great Britain. This research raised a number of issues:

The importance of having formal structures and, in particular, dedicated diversity and equality specialists was identified in all case study organisations. These specialists developed the equalities agendas within the organisations. They also took a broader perspective on equalities across the whole organisation (and one not just focused on staff, but on clients and customers). There was also a move in some organisations to make these specialists separate or at least quasi-autonomous from HR departments, with a view to driving forward changes in organisational culture. For instance, some of these units were based in the Chief Executive or equivalent's department because this was perceived to be more effective for promoting change in the organisation. However, it was still necessary to have a close relationship between these units and HR departments and some 'grey' areas of responsibility between these specialists and HR required resolving.

Organisations varied in their approaches to equalities generally, and to the specific strands of age, religion or belief and sexual orientation. Some, for instance, had developed staff networks for equalities groups and / or had provided facilities for religious observance. Organisations also differed in the level of development of policy and practice across and between equalities strands. While some organisations could be considered to have developed good practice across all three strands, others had developed practice across one or two of the strands only. There were a wide range of contexts and factors affecting policy and practice development, which helped to explain these variations. These included: regional variations; differences between sectors; the size, make-up and dispersion of the workforce; the organisation's client base; benchmarking; the role played by trade unions; and support from senior managers. For instance, a local organisation with a large number of staff in a multi-cultural region may develop staff networks for a range of different equalities groups. A relatively large number of staff from each equality strand and close proximity make this more practical.

Highlighting the importance of equality and diversity in the workplace was seen as crucial by all the case study organisations. They achieved this through a combination of practices including: communication and awareness raising, management support,

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staff networks, employment provisions (such as flexible working), training and monitoring. These practices provided important support for staff working in these organisations whether it was in the form of flexible working, assistance from a staff network or advice from a line manager. For many employees, these measures meant it was possible for them to feel comfortable belonging to a particular equalities group and to combine this with fulfilling their potential in the workplace.

This research has identified that organisational responses to the issues of age, sexual orientation and religion or belief vary, depending on a range of factors identified in Chapter 4. There is no one approach or policy that will be appropriate for all organisations. While the research identified a number of good practices, it is also the case that some of the good practice in employment in relation to these three strands is still emerging and developing. Moreover, there is variation across the organisations in the level of support and provision in relation to these equality strands. This research has identified some of these emerging good practices that could be adopted within other organisations. However, since some of what works in some organisations may not be appropriate for others, there will still be further lessons to be learned in the future.

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Appendix

Good practice identified in relation to age, sexual orientation and religion or belief		
AGE	**SEXUAL ORIENTATION**	**RELIGION OR BELIEF**
Recruitment • Having application forms that focus on skills and attributes rather than employment and education histories - competency based application forms. • Drawing up job adverts that avoid the use of age discriminatory language e.g. 'youthful enthusiasm'. • Using telephone interviews as part of the initial selection process. • Drawing up job descriptions that focus on the skills, knowledge and experience required for the post. • Avoiding references to age in job descriptions and person specifications. • Avoiding asking specific qualifications as these change over the years (e.g. 'O' levels versus GCSEs). • Ensuring advertising targets as wide an audience as possible (thus avoiding solely targeting publications aimed at older or younger groups). • Short-listing on the basis of skills and ability. • Ensuring interviews avoid questions related to age (for example 'how do you feel about working with people younger than yourself?'). **(Recruitment)**	**Recruitment** • Advertising posts in a way that is accessible to a diverse audience (e.g. wide interest publication/agency). • Informing LGB people that they are welcome to apply. • Having an Equality Policy stating clear, inclusive recruitment policies and procedures may encourage LGB groups to apply. • Making clear what skills and attributes are required and basing recruitment on these. • Avoiding asking personal questions at interview as these may be perceived to be intrusive and imply discrimination. • Avoiding asking about marital status or civil partnership status, and if such information is required, not asking candidates to specify which. If the information is required, seek this in confidence once the selection process is completed. • Being aware that the laws relating to gay men have changed, and that it is possible applicants may have a criminal conviction for activities no longer unlawful (such as consensual adult gay sex). • Adding monitoring of sexual orientation to that of other employees groups in the recruitment process. **(Recruitment)**	**Recruitment** • Advertising posts in a way that is accessible to a diverse audience (e.g. wide interest publication / agency). • Making it clear what skills and attributes are required and basing recruitment on these. • Stating if and why a Genuine Occupational Requirement applies to a particular post. • Making clear the nature of the job (to avoid potential conflict of interest on religion or belief grounds). • Inviting applicants to state any special needs (e.g. diet) at selection / interview, but informing them that they would not be disadvantaged because of this. • Being flexible in the dates and times of selection / interviews so as not to conflict with the religious commitments of interviewees. • Being aware that certain forms of conduct at interview (e.g. shaking hands with members of the opposite sex) may conflict with religious adherence. • Avoiding personal questions about a candidate's religion or belief, unless this is necessary for the job. **(Recruitment)**

• Focusing on transferable skills rather than formal qualifications. • Monitoring recruitment decisions by age.	• Training interviewers and recruiters in understanding and applying selection criteria and how to avoid making assumptions based on stereotypes and prejudices.	
Training and career development • Training being made available to all workers and ensuring training methods are suitable for older workers (e.g. the use of PCs may be a deterrent to older workers). • Not making assumptions about older workers' career aspirations.	**Training and career development** • Offering equality training to managers and employees covering use of homophobic and heterosexist comments and inappropriate language and behaviour. • Offering specific development opportunities for lesbian and gay employees. • Promoting generic career development opportunities amongst lesbian and gay employees. • Developing mentoring schemes with LGBT members. • Encouraging LGBT role models. • Tailoring career guidance and support.	**Training and career development** • Ensuring opportunities for promotion and training are made known to all staff and are available on a fair and equal basis. • Considering how arrangements for delivering training may affect someone because of their religion or belief.
Performance and appraisal • Ensuring performance appraisal is not influenced by managers / line managers' preconceptions about age. • Having robust appraisal systems that make the most effective use of workers' skills and talents regardless of age. • Recognising that age is a poor predictor of performance.	**Performance and appraisal** • Offering training for managers so that they are aware of the potential for bias in making judgements about people, including avoiding implicit homophobia and misconceptions about LGB people.	**Performance and appraisal**
Policy and practices • Reducing hours for older workers as they approach retirement. **(Policy and practices)** • Allowing time off for caring	**Policy and practices** • Seeking advice on equal treatment of same-sex partners in relation to provision of pensions, life and health insurance. **(Policy and practices)** • Avoiding assumptions that	**(Policy and practices)** • Considering reasonable

for partners / older relatives (older workers are less likely than younger workers to ask for time off for caring responsibilities). • Realising that other flexible working practices such as home-working and reduced hours may benefit older workers. • Offering different work opportunities, where appropriate, as employees get older.	everyone is heterosexual. This applies to social gatherings which are extended to partners of staff so that where opposite sex partners are invited, same-sex partners are also invited. This also applies to terms and conditions, including bereavement leave; parental leave and adoptive parental leave; relocation expenses; carer's leave; travel benefits; company discounts and private healthcare. • Making efforts to ensure confidentiality of procedures and information management systems so that staff are able to keep their sexuality private and confidential if they wish to do so.	adjustments to accommodate specific needs. This includes: dress codes, facilities for prayer, leave, dietary requirements and social interaction (see religious observance below).
Awareness and monitoring • Understanding that an equal opportunities policy in relation to age can help to raise awareness among employees about their right not to be discriminated against on the basis of age. • Raising awareness among managers about their responsibilities not to discriminate and to address age related harassment in the workplace. • Making employees aware of prohibited and unlawful behaviour in relation to age.	**Awareness and monitoring** • Ensuring that staff responsible for giving information on terms and conditions are aware of issues in relation to LGB staff. • Making staff aware that they are personally liable (along with the employer) for any claims of discrimination or harassment on grounds of sexual orientation. • Monitoring procedures to monitor sexual orientation, e.g. staff satisfaction surveys and equality and diversity surveys.	**Awareness and monitoring** • Making staff aware that they are personally liable (along with the employer) for any claims of discrimination or harassment on grounds of religion or belief.
Bullying and harassment Recognising that people can become targets of bullying because of their age – for example, through inappropriate comments, offensive jokes and exclusion from informal groups. **(Bullying and harassment)**	**Bullying and harassment** • Minimising potential for discrimination, harassment and victimisation, for instance, by having an Equality Policy and training staff on its contents. **(Bullying and harassment)** • Having a clear grievance	**Bullying and harassment** • Minimising potential for discrimination, harassment and victimisation, for instance, by having an Equality Policy and training staff on its contents. **(Bullying and harassment)** • Developing a clear

	procedure (required in law) and ensuring that staff know what steps to take in case of discrimination or harassment on grounds of sexual orientation. • Monitoring complaints and reviewing policy.	grievance procedure (required in law) and ensuring that staff know what steps to take in case of discrimination or harassment on grounds of religion or belief.
Health protection and promotion - workplace design / ergonomics • Designing workplaces to take account of an ageing workforce. • Using health promotion used to ensure the good health of the workforce regardless of age.	**Health protection and promotion - workplace design / ergonomics**	**Health protection and promotion - workplace design / ergonomics**
		Religious observance • Considering providing a quiet area for prayer or contemplation. • Being aware of holy days and festivals and granting time off where business allows. • Recognising and supporting special dietary requirements involving food, drink and fasting. • Permitting flexibility in dress codes to allow for the wearing of religious clothing / jewellery. • Understanding that physical contact is unwelcome in some faiths. • Understanding and allowing flexibility for different arrangements for bereavement.
Staff networks	**Staff networks** • Establishing an employee LGB forum in consultation with LGB staff.	**Staff networks**
Retirement • Offering phased	**Retirement**	**Retirement**

retirement. • Giving the employees the opportunity to work past retirement age where appropriate.	83	
Redundancy • Being aware that using length of service as part of the selection criteria for redundancy is likely to be discriminatory.	**Redundancy**	**Redundancy**
The post-employment relationship	**The post-employment relationship**	**The post-employment relationship** • Being aware that the employer should not discriminate, harass or victimise on the grounds of religion or belief even when the individual is no longer employed by the company, for instance in providing references for ex-employees.

References: Acas (2005a, 2005b, 2005c, 2006, 2007, 2009); CIPD (2008a, 2008b, 2008c); Employers Forum on Age (2008); Employers Forum on Belief (2009a, 2009b); Stonewall (2005, 2006a, 2006b, 2007a, 2007b); The Age and Employment Network (2007).

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This report examines good practice in relation to recruitment, promotion and advancement at work with regard to age, sexual orientation and religion or belief. Based on detailed research in eight case study organisations in England, Scotland and Wales, the report shows that organisational responses to these issues vary according to a range of contexts and factors. It also identifies some of the emerging good practices that could be adopted within other organisations.