



EUROPEAN COMMUNITY
European Social Fund

Report from ESF Project: Involvement of Stakeholders in Diversity Management.

Professional Perspectives on Diversity Management

December 2005

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1 Acknowledgements

A grant to fund this research was gratefully received from the European Social Fund. In addition, the authors would like to thank all the organisations and individuals that participated in this research project. All the participants were very generous with their time and without their help the research could not have been undertaken. Thanks also to Chris Creegan who expertly conducted a number of the interviews and to Elizabeth Kwast who also expertly transcribed most of the interviews.

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3 Background to the ESF research project

Traditionally equal opportunities policies (EOPs) have been the main organisational tool used to tackle gender and race discrimination. However, over the last ten years or so a diversity discourse, originating in the USA, has become more prominent in the UK. This recognises broader dimensions of diversity including less visible bases of difference. Employers are exhorted to develop policy to harness workforce diversity towards business goals. From the diversity perspective, EOPs, with their emphasis on the social justice case for equality, are viewed as being less able to meet the social and economic challenges of the new millennium (Kandola and Fullerton 1998). Many advocates within the Human Resource Management (HRM) field suggest that diversity management is a more effective means of achieving equality for all. Although there are now a number of good practice guides (Johnstone 2002; Kandola and Fullerton 1998) and theoretical explorations (e.g. Lorbiecki and Jack 2000), little is known about diversity management in *practice* in Britain. Indeed, there is controversy about whether diversity management is anything new, and if it does offer a way forward for equality policy and practice, particularly in the areas of gender and race, and whether it makes a real contribution to business success (Cornelius et al 2001). However, the concept of diversity has filtered through to the policies of UK organisations (Johnstone 2002).

Lack of knowledge about the processes and outcomes of diversity management means that there are significant areas of potential difficulty when implementing diversity policies, and more importantly in achieving real diversity gains that contribute to business outcomes. A particular area of concern is that while senior commitment to diversity is often present, difficulties are found in implementing policies at local team and line management level. Here, stakeholder involvement is seen as crucial for employee and line management buy-in to equality and diversity initiatives and consequently for successful outcomes (Kirton and Greene, forthcoming).

There is now a need for research, which investigates diversity management at the level of organisational policy and practice, exploring the initiatives and measures, the processes involved and outcomes delivered. In particular it is necessary to understand the role of

stakeholder involvement in diversity management in order to formulate conceptions of good practice, which better fit pluralist organisational realities and which are more likely to generate positive equality outcomes.

The ESF funded research project – *Involvement of Stakeholders in Diversity Management* – aims to contribute to our knowledge and understanding of diversity management in Britain. The research – funded from 1st January 2004 – 31st December 2005 – explores equality and diversity policy and practice in a range of British public and private sector organisations. Examples of organisational equality and diversity policies and initiatives have been collected. In addition, through in-depth interviews, focus groups and workshops, the perceptions and experiences of a variety of organisational stakeholders have been gathered, including human resource management practitioners, equality and diversity specialists, senior managers, line-managers, trade union officials and representatives, non-management employees.

This report focuses on *Professional Perspectives on Diversity Management* and is produced from the research carried out with organisational diversity specialists and champions, trade union equality officers and a mixed group of other equality and diversity professionals.

4 Literature Review

This report concentrates on policy and practice, rather than on the theoretical and conceptual debates surrounding the development of the concept of diversity. However, it is worth saying a few words about the shift from an ‘equal opportunities’ concept towards a diversity one. At first sight this might appear a purely theoretical debate and therefore of little concern to policy-makers and managers of organisations. The question at the heart of this seemingly academic debate is one that very much concerns ‘real’ organisations – whether the diversity concept symbolises a shift away from a policy focus on discrimination and disadvantage (within legal constraints) towards a focus on efficient utilisation of (human) resources. Critics of diversity are concerned about the former, while proponents have turned their attention to the latter.

The five central tenets of diversity management have been summarised as:

- (i) internally driven, not externally imposed – that is the concern is with business or organisational need, rather than with minimal legal compliance;
- (ii) focused on individuals, not groups – diversity claims to benefit everyone and not simply disadvantaged groups;
- (iii) concerned with diversity not equality – recognising difference rather than trying to achieve sameness;
- (iv) addressing the total culture, not just the systems – moving the policy focus away from rules and procedures towards culture change initiatives;
- (v) the responsibility of all, not just personnel – the role of line-managers is played up (Ross and Schneider 1994).

These ideas are reflected in the diversity statements of many British organisations (see Johnstone 2002). If organisational statements on diversity are anything to go by, it appears widely accepted by British organisations that workforce diversity is good for business performance (Johnstone 2002; Cornelius et al 2001). It then follows that organisations need to develop policies to ‘manage diversity’ in order to fully exploit all

that a diverse workforce has to offer. Diversity management refers to ‘the systematic and planned commitment on the part of organisations to recruit and retain employees with diverse backgrounds and abilities’ (Bassett-Jones 2005).

4.1 Approaches to equality and diversity management

Jewson and Mason (1986) argued that various participants involved in the development of ‘equal opportunities’ policies in the 1980s used terms and concepts in a confused, arbitrary and contradictory manner. Therefore the aims of the policy were often unclear and it was impossible to evaluate the success or otherwise of initiatives. In addition, the long term effect was to generate disappointment with and distrust of ‘equal opportunities’ policies (Jewson and Mason 1986). Jewson and Mason distinguished between two different conceptions of ‘equal opportunities’ – the *liberal* and *radical* views. The *liberal* conception is based on the principle of fair procedures, implemented via bureaucratization of decision-making. A key element of effectiveness is positive action and the aim is to generate the perception that justice has been done. The *radical* conception is based on the principle of fair distribution of rewards, implemented by politicization of decision-making. A key element of effectiveness is positive discrimination, which gives preferential treatment to under-represented groups. In addition, the aim is to raise consciousness so that organisational members take opportunities to advance the position of disadvantaged groups. For example, from two equally qualified candidates, selectors would choose an individual from an under-represented group, if possible. In practice most ‘equal opportunities’ policies in Britain, underpinned by legislation, were/are liberal in nature.

Diversity management seems to suffer from the same problems of conceptual confusion. While the central tenets, described above, appear to be agreed upon, at present there is very little literature detailing and discussing precisely what measures and initiatives comprise ‘systematic and planned commitment’ (Bassett-Jones 2005) to diversity management within British organisations. Therefore it is useful to outline conceptions of broad approaches.

Liff's (1997) typology of four diversity management approaches is useful as it differentiates between the underlying principles and aims of policy and therefore reflects the multi-dimensional nature of many organisational policies. The first approach Liff (1997) identifies is *dissolving differences*. Differences between people are not seen as based on social group membership (such as gender or race), but are individually based. It follows that initiatives would seek to respond to individual needs. Essentially, this approach ignores the wider social causes of inequality, including unequal access to training and education.

The second approach is *valuing differences*. Here Liff (1997) refers to social group-based differences and the recognition of the way in which these contribute to inequality. Initiatives would include provision of training for employees from under-represented groups to help overcome past disadvantage. According to Liff's conception, this approach also has strong echoes of the *liberal* approach in so far as there is a concern to dismantle *collective* barriers. However, the intention of the *liberal* approach is to minimise rather than value differences. In practice it appears that some organisations understand *valuing differences* as to do with individual, rather than group-based differences, so whether or not a *valuing differences* approach can address inequalities is not clear.

The third approach is *accommodating differences*, which is broadly similar to traditional *liberal* 'equal opportunities' where there is a commitment to creating policies that open up opportunities (rather than providing special measures) to under-represented groups. This approach might be found where the most compelling business case for diversity relates to the changing demographic composition of the labour market.

The final approach is *utilizing differences* where social group-based are recognised and provide the basis for different treatment rather than the focus of equality policies. Therefore this approach is not concerned with social justice, rather these differences will be put to use for the benefit of the organisation. Whether or not equality goals will inadvertently be met depends very much on the organisation's motives for utilizing difference.

It is clear that there are some parallels between diversity management and 'equal opportunities' approaches and this is to be expected given the impossibility of a complete break from past approaches, especially in view of the legislation. However, one feature of diversity management that stands out when compared with traditional 'equal opportunities' is its strong strand of individualism (Liff 1997).

4.2 Benefits of diversity management

Traditional 'equal opportunities' has been largely concerned with social justice, although business case arguments have always formed part of the basis for policy (Colling and Dickens 2001). Within diversity management there is a much stronger emphasis on organisational benefits. Four main advantages to organisations are usually emphasised:

1. taking advantage of diversity in the labour market;
2. maximising employee potential;
3. managing across borders and cultures;
4. creating business opportunities and enhancing creativity (Cornelius et al 2001).

The first point – taking advantage of diversity in the labour market - highlights the changing demographic composition of the workforce such as the increased employment participation of women, the ageing workforce and larger numbers of minority ethnic workers, for example. This argument is founded on the belief that only organisations that attract and retain a diversity of employees will be successful, particularly in tight labour markets. British organisations seem to be particularly persuaded by this argument.

The second point – maximising employee potential - argues that the harnessing of human capital possessed by diverse groups will improve organisational performance.

Conversely, unfair and discriminatory treatment creates low morale and disaffection leading to poor performance. Therefore organisations need to actively manage diversity in order to extract the highest levels of performance from employees.

The third point – managing across borders and cultures - mainly concerns the globalization of world markets and the international labour market that many

organisations draw on. Here the argument is that a diverse workforce can enhance an organisation's ability to reach and satisfy a broader customer base. While this might seem to apply more to commercial business organisations operating at a multi-national level, it is also possible to situate this argument within the public sector, for example the National Health Service and its active recruitment of overseas nurses might spring to mind. It might be argued that this strategy enables hospitals to meet the needs of a diversity of patients.

The fourth point – creating business opportunities and enhancing opportunities - is about tapping the supposedly culturally specific experiences and insights that a diverse workforce possesses in order to move the organisation forward. Locating this argument in the public sector, the Small Business Service of the Department of Trade and Industry for example, might black employees have a greater understanding of the needs of black small business owners, therefore enhancing the reach of the SBS? Similarly if we think about product development in the private sector, is it possible that women will be better placed to identify products that other women might buy or might Asian workers know more about the kinds of foods that Asian customers might be interested in?

In practice, there is conflicting evidence on whether or not and which kind of organisations might benefit from workforce diversity and from adopting a 'valuing diversity' policy approach (discussed above). A similar discussion has taken place on whether equality is good for business. It has been argued that the business case for *equality* is 'partial and contingent' and does not have universal purchase (Dickens 1994). For example, some organisations compete on the basis of low cost; therefore equality measures, such as work-life balance policies, might not be cost-effective. In addition, some organisations might benefit from an absence of equality in so far as discriminatory practices can contribute to the bottom line – organisations can benefit from, for example, the utilization, but under-valuing of women's labour (Dickens 1994). After all, the gender pay gap means that women are cheaper to employ. Translating Dickens' arguments into the language of diversity, it is possible for organisations to benefit from having and utilising a diverse workforce, but whether or not there will be benefits from *valuing* diversity depends very much on the type of organisation and its business and

employee relations strategies. An organisation with a cost-minimisation strategy might regard its low-paid works as entirely dispensable and replaceable and be unwilling to invest in potentially costly diversity initiatives.

Advocates of diversity (e.g. Ross and Schneider 1994; Kandola and Fullerton 1998; Schneider 2001) have tended to gloss over these issues, making broad-brush statements about the benefits of diversity that lack a contextualised analysis. There is no solid evidence that diversity management policies are any less partial and contingent than traditional 'equal opportunities'. There are, however, suggestions that diversity management can deliver organisational benefits if initiatives are formulated in ways that are sensitive to the existing culture and practices and if some of the potential dilemmas and challenges are dealt with (Cornelius et al 2000; Maxwell et al 2001; Sinclair 2000).

4.3 Dilemmas and challenges of diversity management

4.3.1 Union involvement

Employers have not always voluntarily improved their policies and practices and 'bottom-up' pressure for equality exerted through trade unions has proved just as important as the 'top-down' commitment of senior management (Dickens, 1999; Colling and Dickens 1998). Dickens et al (1988:65) highlighted this in their research into 'equality bargaining' in the 1980s, arguing that a 'review of discriminatory terms and practice is more likely to occur where there is some form of joint regulation than where issues are unilaterally determined by employers'. More recently, there is evidence that workplaces with recognised trade unions are more likely to have developed formal equality policies than non-unionised firms (Noon and Hoque, 2001) and that unionised workforces generally experience less pronounced inequalities than non-unionised ones (Colling and Dickens, 2001).

With British organisations now typically shifting away from traditional 'equal opportunities' towards diversity management, there is some concern that unions will have less influence on the policy agenda. Will the ultimate consequence be that unionised workplaces lose their status as more equal ones? In their role as defenders and promoters

of employee rights, there are three key features of diversity management that are likely to cause concern for unions, at least in theory:

- the underpinning economic rationale for diversity;
- the focus on the individual;
- the positioning of diversity as a top-down managerial activity (Kirton and Greene, forthcoming).

These key features potentially

- divert policy efforts away from the trade union aim of social justice,
- remove the union focus on group-based forms of discrimination and disadvantage, and
- marginalise the role of trade unions in bargaining for equality.

4.3.2 Benefits for employees?

It is particularly noticeable that within both the theoretical and policy debates about the benefits of diversity, employee perspectives are often absent and it is taken for granted that if organisations have much to gain from workforce diversity, then by extension employees have much to gain from diversity policies. Therefore, one of the issues that stands out concerns how employees (at various levels of the hierarchy) benefit from diversity management, as opposed to from more traditional ‘equal opportunities’ approaches. From a trade union perspective, Kirton and Greene (forthcoming) identify three potential problems with diversity management that question the extent to which diversity policy benefits employees.

First, the business economic rationale for diversity might in practice mean that while some equality and diversity issues are vigorously tackled, others might be neglected if no strong business reason for action can be identified. For example, whether or not a business case for employing disabled people can be made has been questioned (Woodhams and Danieli 2003). In fact in much of the diversity literature and in organisational policies there is an implicit, if not explicit focus on gender and race, rather

than on broader diversity issues. Further, if organisations utilise employee difference simply to improve business performance, some employees might feel exploited and unfairly treated (Thomas and Ely 1996).

Second, diversity policies usually place the emphasis on the individual employee. This can mean that ‘special measures’ or positive action initiatives aimed at disadvantaged groups of employees, such as black and minority ethnic or women, fall out of favour. While this need not be a problem in itself, in many organisations it is measures such as targeted management training programmes or mentoring that have increased the proportion of previously under-represented groups in the management layers of the hierarchy or within certain occupations. A focus on the individual might prove insufficient to reverse under-representation.

Third, diversity policies emphasise senior level commitment over ‘grassroots’ involvement. Although it is widely accepted that the most senior people in the organisation need to publicly support the policy, the more challenging project is ensuring that all organisational members ‘buy into’ diversity and operationalise that commitment into everyday behaviour and practices. It is also necessary for employees to be involved in order to identify their experiences and needs (Cameron 1993). One way to do this, as many organisations recognise, is to find ways of involving different groups of employees, via for example, trade unions and employee networks.

4.3.3 Line-management buy-in

One significant criticism of the traditional ‘equal opportunities’ approach is that it was largely seen as a specialist, peripheral activity that had little to do with line-managers. In contrast, within diversity management there is a very clear role for line-managers (Kandola and Fullerton 1994). It is argued that diversity management is likely to be most effective when there is pro-active line management involvement (Cornelius et al 2000). Therefore, another dilemma is how to obtain line-management buy-in and embed diversity into everyday managerial practice.

Given that many organisations now devolve authority for a range of staffing decisions to line-managers, they are critical to the success of a diversity management policy,

particularly to the culture change at the heart of diversity management. Many organisations are grappling with how to make it a 'core competency' so that managers have to demonstrate how they build diversity into their own performance (Schneider 2001). While in theory diversity management represents an opportunity for interested and committed managers to get involved in equality and diversity (Cunningham 2000), in practice there is evidence of line-managers' reluctance to give priority to diversity issues (Cornelius et al 2000; Maxwell et al 2001). The freedom to manage and to exercise discretion that comes with devolvement can also provide an opportunity for line-managers to ignore the equality and diversity agenda (Cunningham 2000).

It is also clear that line-managers face many conflicting priorities, including heavy workloads, tight deadlines etc and that these difficulties might lead them to opt out of actively 'managing diversity'. For example, the public sector has undergone such extensive changes over the last twenty years or so, that the pressures that line-managers are under are magnified to the extent that they might even feel 'besieged' (Cunningham 2000). For some line-managers it might not be a question of lack of time or commitment, rather they might genuinely be at a loss to understand exactly what it is they are supposed to do to demonstrate that they value diversity (Iles 1995). In addition, some line-managers might believe that the diversity management policy is simply rhetoric, a passing fad, and therefore might not take it seriously (Maxwell et al 2001).

Another question impacting on the role of line-managers is whether diverse teams are easier or more difficult to manage than relatively homogeneous ones. Again, there is conflicting evidence in both the US and UK literature (e.g. Adler 1991; Iles 1995; Kossek et al 2003). Even proponents of diversity recognise that the likelihood that diversity will promote team creativity and innovation and improve problem-solving and decision-making is debatable (Kandola and Fullerton 1994). Some research has highlighted the way that diversity in work teams can (or be widely held to) lead to divisions, conflicts and poor interpersonal relations (Carter 2000; Miller and Rowney 1999; Schneider and Northcraft 1999), potentially contributing to poor performance. This might result in line-managers having a preference for homogenous work groups in order to avoid the extra time and effort they might believe is necessary to manage diverse ones.

4.3.4 Conflicts and paradoxes

The criticism of diversity management in the more critical academic literature has centred on the ‘upbeat naivety’ (Prasad et al 1997) contained in most definitions and statements. The idea that the conflicts and paradoxes of ‘equal opportunities’ can be swept away by the more positive language of diversity management is widely thought to be nothing more than wishful thinking (e.g. Lorbiecki and Jack 2000). Even the very idea that diversity is ‘do-able’ (i.e. that it can be managed and harnessed for organisational ends) is false according to some commentators (e.g. Prasad et al 1997).

Most models of diversity management prescribe culture change as necessary for the success of initiatives. This stands in contrast with traditional ‘equal opportunities’ which depended more on bureaucratic methods – formal rules and procedures – an approach that has been criticised for failing to guarantee fair and equal outcomes or even treatment (e.g. EOR 1995). In some areas such as the public sector, culture change has been part of a wider package of initiatives under the umbrella of ‘New Public Management’ designed to rid bureaucracy of its inefficiencies (Cunningham 2000). However, there is rarely any in-depth analysis of exactly how culture change can be achieved (Dick 2003). There is often an assumption that organisational culture is something that can be easily manipulated by senior management to achieve business goals and the complexities of managing something as intangible as culture, are downplayed. Evidence in support of this assumption, particularly in relation to diversity initiatives, is lacking.

One of the supposed benefits of diversity management is that it is inclusive and does not exclude anyone, ‘even white, middle-class males’ (Kandola and Fullerton 1994:9). This is meant to avoid the problems of backlash associated with the ‘equal opportunities’ emphasis on particular groups and on special measures to assist them. In theory this should then create a more positive climate for diversity. However, if diversity management successfully achieves its aim of attracting and retaining a diverse workforce (at all levels) then this will inevitably involve loss of privilege for some groups, who will find the competition for rewards such as bonuses and promotions intensified (Cockburn 1991; Sinclair 2000). This is bound to attract a degree of anger and resistance and

confronting these reactions is arguably part of the process of diversity management (Dick 2003; Miller and Rowney 1999).

4.4 Professional roles in diversity management

As the ideas contained within the diversity concept have begun to influence British organisations, so too have methods of policy implementation changed. This has led to new ideas about where responsibility for the equality and diversity policy should lie and what role different members of the organisation should play. Traditionally, the personnel department was often the architect and guardian of employer ‘equal opportunities’ policies, often having a ‘policing’ role to ensure that the policy was adhered to throughout the organisation. In addition, many larger private and public sector organisations employed specialist ‘equality officers’ and many public and some private sector organisations had ‘equality units’ whose task was to monitor policies and practices, to recommend changes and new policy initiatives and to provide training on equality issues. Unionised organisations also often had equality committees consisting of management and union representatives (Cockburn 1991).

The shift towards diversity management has in many organisations led to a reassessment of the most effective structures to support and implement policy. Since, as stated earlier, diversity management emphasises the important role for senior management in lending top level commitment to diversity and for line-managers in implementing the policy on a day-to-day basis, the literature tends to focus on their roles, rather than on the role of diversity specialists (e.g. Cornelius et al 2000 and Lobel 1996). Reflecting this approach, many organisations have appointed ‘diversity champions’ from among operational managers, sometimes at a very senior level (e.g. board of directors), in order to give credibility to the policy (Johnstone 2002). The idea is that as operational managers, they understand the issues facing other managers and by demonstrating that they ‘buy into’ diversity, they lead by example and take responsibility for promoting the benefits of the policy more widely in the organisation.

Turning to people whose full-time job is concerned with equality and diversity, there is little literature focusing on their roles, probably because diversity management sees the

role of line-managers as more critical to the success of the policy. However, research indicates that in the US, Australia, New Zealand and Britain, diversity managers have replaced the former equality officers (Sinclair 2000). The relevant question when thinking about the implications for policy and practice though is whether the current 'generation' of diversity specialists simply have a new label or whether their characteristics and roles have altered.

Some organisations have repositioned diversity within the organisational structure, away from HR and into 'corporate social responsibility'. This reflects the idea that diversity is not simply concerned with the employment relationship, but core to business strategy. In this model, diversity specialists take responsibility for both HR and business (service delivery) equality and diversity issues. For example, they might be concerned with initiatives to broaden the customer base to 'minority' groups or with looking at the impact of the business on a diversity of local communities (Johnstone 2002). This might mean that it would make sense for the diversity specialist to have a broader business background, rather than simply knowledge and experience of equality and diversity issues.

However, it is not clear that a more overt business orientation necessarily implies less commitment to the moral and social justice case of traditional 'equal opportunities' held by the earlier 'generation' of equality officers. For example, based on research in the US, Litvin (2002) explores the compromises that diversity consultants have to make in order to supply the 'product' their corporate clients want. She found a dissonance between the diversity consultants' beliefs about what needed to be done and the more business focused objectives of their clients. Similarly, Sinclair (2000:239) finds Australian diversity managers critical of the more 'palatable language' of diversity, which they accused of trivialising discrimination. In New Zealand 'Equal Employment Opportunity (EEO)' practitioners contested the individualistic approach of diversity and fought against its substitution for EEO. Based on research in Britain, Lorbiecki (2001) positions what she calls 'diversity vanguards' as 'outsiders-within', because she found them to be people who felt compelled to speak out against discrimination and yet who also have to uphold the organisation's business objectives. Also, in the British context, Lawrence

(2000) finds that equality and diversity specialists use the business case to argue for equality initiatives within their organisation, but their personal commitment to equality issues often also has a moral basis.

While diversity professionals are concentrated in mainstream public and private sector employers, there is also a group that works more from the outside towards equality and diversity goals. Trade unions, a number of government and campaign organisations have also traditionally been involved in 'equal opportunities'. Their perspectives can assist in generating a more rounded picture and critical appraisal of equality and diversity policy developments. Most of the larger and some of the smaller unions and the TUC employ equality officers, whose role is to co-ordinate activity and provide advice in the area of equality and diversity, including policy and research, bargaining and negotiating, training, individual cases of discrimination. While there is evidence to suggest that union equality officers continue to push the social justice case for equality that is more resonant with traditional 'equal opportunities', they have also found their work influenced by diversity management and are certainly engaging, albeit in a critical fashion, with the emerging ideas and policies (Kirton and Greene, forthcoming). Similarly campaign bodies such as *Opportunity Now* and *Race for Opportunity* (both business-led campaigns) have now switched to the language of diversity and with that now strenuously promote the business benefits of diversity.

5 Professional perspectives on diversity management – The research

The aim of this strand of the research project – *Involvement of Stakeholders in Diversity Management* – was to investigate the roles and perspectives of a range of professionals involved in the area of diversity management. A total of 57 individuals from 46 organisations participated in the research presented in this report. The organisations are listed alphabetically later and consist of:

- 14 public sector employers
- 16 private sector employers
- 2 voluntary sector employers
- 10 unions
- 4 campaign/official organisations

It was a deliberate research strategy to have a mix of organisations in order to develop as a round a picture as possible of developments in diversity management. Some organisations were approached because of existing contacts; the public sector employers were approached largely because of their reputation for being at the forefront of traditional equality policies. All of the public sector organisations we approached agreed to participate. Private sector employers were of particular interest because most diversity research in the UK to date is located in the public sector, leaving a knowledge gap. However, they proved more difficult to recruit to the study. Most were identified through their membership of campaign organisations such as *Race for Opportunity* and *Opportunity Now*, which publish lists of members on their web sites. Membership of such organisations was taken to indicate a commitment to equality and diversity and we also believed that they would be more likely to participate in the research. Thirty-five private sector employers were approached, 16 agreed to participate, while the remainder either declined or did not respond to repeated attempts to gain a response. Therefore although the number of private sector organisations is greater than public sector, we would have

liked to have seen more agree to participate. Given the stakeholder focus of the research project, it is relevant to note that 25 of the 32 private/public/voluntary sector organisations represented in the study have trade union presence/recognition.

The 57 individual participants consisted of:

(i) Organisational diversity specialists (28)

Defined as individuals whose job title contains 'diversity' or whose position in HR is largely dedicated to equality and diversity

(ii) Organisational diversity champions (11)

Defined as individuals with operational line-management responsibilities who have volunteered to 'champion' diversity

(iii) National trade union equality officers (11)

Of individual trade unions and the TUC

(iv) Other equality and diversity professionals (7)

Diversity consultants (2)

Representatives of relevant campaign and official bodies (5)

The demographic characteristics of participants are shown in Table 1, from which it can be seen (based on participating organisations) that from this research it appears that there are far more women than men involved professionally in diversity management and far more white than minority ethnic people.

Table 1: Demographic characteristics of participants

	Diversity Specialists	Diversity Champions	Trade Union Equality Officers	Diversity Consultants	Representatives of Campaign or Official Bodies
Gender					
Female (41)	22	4	9	2	4
Male (16)	6	7	2	0	1
Ethnicity					
White (45)	22	9	9	2	3
Minority Ethnic (12)	6	2	2	0	2

5.1 Organisations participating in the research

ACAS

Amicus

AUT

B&Q

Barclays Bank

Barclaycard

British Conservation Trust

Volunteers

Birmingham City Council

British Airways

Cambridgeshire Police Service

Cameron Woods Associates

Carillion

Central Scotland Forest Trust

Centre for High Performance Development

Centrica

Commission for Racial Equality

Connect

Coventry City Council

CWU

Department of Health

Department of Trade and Industry

Deloitte

Dumfries and Galloway Fire Service

GMB

GPMU

The Guardian

Gwent Police Service

Hackney Council

HSBC

Inkfish

Inland Revenue

J P Morgan

Lehman Brothers

Metropolitan Police Service

Northampton Police Service

PCS

Price Waterhouse Coopers

Prospect

Queen Mary, University of London

Race for Opportunity

Tower Hamlets Council

Trades Union Congress

Unison

Warwick University

West Bromwich Building Society

24

Women's National Commission

5.2 Research methods

The primary research method was semi-structured, in-depth interviews carried out by a team of four experienced researchers with academic and practitioner experience in the field of equality and diversity. Interviews were conducted using an interview guide and questions were adapted for the different categories of interviewees, but covered five main areas:

- (i) Career background
- (ii) The individual's role in diversity management
- (iii) Understandings and views on the concept of diversity management
- (iv) Views and experiences of stakeholder involvement
- (v) Experiences of policy and practice

In order to frame the discussion about diversity management, interviewees were shown and asked to comment on Kandola and Fullerton's (1994:8) widely used definition:

‘The basic concept of managing diversity accepts that the workforce consists of a diverse population of people. The diversity consists of visible and non-visible differences which will include factors such as sex, age, background, race, disability, personality and workstyle. It is founded on the premise that harnessing these differences will create a productive environment in which everybody feels valued, where their talents are being fully utilised and in which organisational goals are met.’

The vast majority of interviews were recorded and transcribed. A small number of participants did not agree to recording, therefore detailed notes were taken. The interviews were coded and analysed thematically using the software NVIVO.

In addition a project workshop was held in April 2004 attended by twelve selected individuals professionally involved in the area of diversity management. The workshop had an open and participative agenda and explored five main questions:

- (i) What are triggers to diversity policy in different organisational contexts?
- (ii) What stakeholders are involved in developing diversity policy?
- (iii) What role do line-managers have in diversity management?
- (iv) What problems or obstacles are faced with implementation?
- (v) What successes and examples of good practice can be identified?

The workshop proceedings were recorded and transcribed and this report draws on the discussions.

Participants were assured of anonymity and confidentiality; therefore individuals are not identified by name or organisation in the findings sections of the report.

6 Research findings

6.1 Organisational diversity specialist and champion perspectives

This section of the report is based on the views of 39 organisational diversity specialists and champions, drawn from individual interviews and the participation of a small group of organisational representatives at the first project workshop. Their work backgrounds were varied, indicating the broad range of people now taking professional roles in diversity management. Prior to their current role, some of the specialists had previously been operational managers; some were previously HR practitioners of another kind and a minority had a longer history of specialism within the field of equality and diversity, sometimes involving political, community or trade union activism. Many of the specialists had been recruited internally to their present role from other parts of the business/organisation. This was perceived to be part of an organisational strategy to make diversity more of a business than HR issue. The latter group were more likely to be positioned outside of HR and within the realms of ‘corporate social responsibility’. Many of the specialists emphasised the importance to their current role of their previous business and management background, which they felt gave them greater insight into business issues and the issues facing line-managers. The specialists’ status in the organisation varied – some were employed at a relatively low level in the organisation (sometimes called advisors) and others were very senior and earning high salaries.

The champions were operational line-managers also of varying levels of seniority who had volunteered for or been recruited to the role. They were usually involved in some kind of equality and diversity forum where policy was discussed and formulated, often representing their department or operational area of the organisation. Their roles also included such activities as raising awareness, ‘modelling’ appropriate behaviours, supporting junior managers in aspects of equality and diversity and supporting non-management employees experiencing equality and diversity related problems.

6.1.1 Perspectives on Policy Approaches

Some level of prior commitment to equality and diversity issues within the organisations represented was expected due to the fact that approaches to organisations were made through groups such as Opportunity Now and Race for Opportunity. However there was some variation in the stage of development of equality and diversity policy within the organisations. While most organisations had long established formal policies, there was a small group that were only at early stages of policy development or who were in the process of revising or rewriting policy documents.

All interviewees were familiar with the terminology of diversity management, and the majority of interviewees now had the term diversity in their title or remit of responsibility, and policy documents within their organisations used diversity terminology. This indicates the high level of dissemination of the diversity concept within British organisations. However it should be noted that a significant minority had only recently moved from equality to diversity and some organisations still entitled their policy documents as 'equality' or 'equal opportunities'. Whether or not this variation in terminology made any difference to the content or process of policy implementation was an area of investigation.

Interviewees were asked what they thought the shift from equal opportunities to diversity management means for the equality project. Most interviewees were clear that diversity and equality issues were not separate from each other, but were connected approaches. Indeed, many interviewees seemed to regard diversity as a long-term additive process, talking in terms for example of 'a logical extension', a 'continuum from equal opportunities, through diversity to inclusion', or of the 'building blocks' of equality underpinning diversity, where successes would be built upon and failures learnt from. For example,

'I see that there's almost like foundations to diversity, which are about removing discrimination, doing work around, say, harassment and bullying. I mean basic policies around equality and fairness. Then I think what you're building towards is much more an inclusive organisation.'

‘The first thing is to achieve equality, so that there are no barriers there. But when you’ve achieved that you should then be able to move on to diversity. So it’s [diversity] actually genuinely seeking difference and harnessing that for business value. So, recognising that you’ve got it and doing something with it and celebrating it.’

They were all adamant that diversity had not replaced equality, but rather that the two approaches could not be separated. One organisational specialist even stated that the distinction between the two approaches represents a ‘false dichotomy’ suggesting that the social justice of equal opportunities and the business case of diversity management could be integrated, for example:

‘... people make very strong associations between the concept of equality of opportunity and over-zealous, legalistic behaviour if you like... Now personally I’ve never understood equal opportunities like that... I always understood it as related to the concept of equity, of redistribution and fair outcomes... So I’ve always struggled when people start getting into this equality versus diversity stuff because I’ve never seen it like that. It seems, you know, a false dichotomy, opposition.’

Indeed the continuing moral/social justice imperative for action on diversity was emphasised by the majority of interviewees in terms of linking equality and diversity approaches.

However, at the same time, most interviewees indicated that the diversity concept indicated a change in approach from traditional understandings of equality. Indeed, almost all of the interviewees felt that a conventional definition of Managing Diversity (such as Kandola and Fullerton, 1994) had salience in their organisation and reflected their own policies. One of the key elements of this definition is an expansion of the categories covered to focus more on individual differences (visible and non-visible). The majority of interviewees felt that diversity was based around individual differences, moving away from the focus on social groups and in particular a focus on gender and race:

‘We talked a lot, we talked a lot about visible and non-visible differences... but we also had an acknowledgement that we probably couldn’t write a comprehensive list because we’re the kind of organisation that does view everybody as an individual. So each person who joins us is not a direct replacement for the person who’s left. They will bring their skill set but they are a different person’

‘We want to be looking much more about the individual and individual difference. And although doing some basic... stuff that we need to do to make sure that we’re, [coping] with the... broad requirements of certain groups, but not trying to put people into boxes particularly’.

‘... we don’t specifically refer to different strands in our diversity statement is because we want people to see that it’s not necessarily just about four or five things, that it can be hundred things, it means different things to different people.’

This was viewed as a positive of the diversity approach as it a) avoided the backlash seen as connected to ‘special treatment’ b) did not ‘pigeon hole’ people into social groups and allowed recognition of multiple identities and c) expanded the agenda to look at issues that would not normally emerge within the traditional legislative equality framework, for example work-life balance, flexible working, faith groups, and broader identity issues:

‘Well I think what we’ve got at the moment for equality and diversity work is, we’ve got the six strands that match the European Directives and match the thinking on equality and Human Rights Commission and all that... But then running through the whole lot of it are things like diversity, things like class, things like identity... thinking around people and their lives and what’s going on in their lives’

In addition, diversity management was viewed as more proactive than equal opportunities. Connected to the inclusion of broader issues was also that many interviewees viewed diversity as moving away from an approach that was just focused around compliance (both to laws and to procedures). Diversity was seen as being more about valuing individuals’ diverse experiences, skills and backgrounds and so diversity

was also felt to be a proactive approach that looked to make changes to organisations to ensure that people could be comfortable, rather than making people fit in with the existing culture of the organisation. Many interviewees utilised language based around ‘inclusion’ to capture this viewpoint.

‘... diversity is change management. It is a tool to get people to change the culture, to accept, embrace and recognise everyone’s differences and different lifestyles which actually includes white males. It actually includes people who have got different caring responsibilities’

Diversity was not however just about the recognition of individual differences, but also the *valuing* of individual differences. There was often a specific organisational rationale to this valuing, and we asked specific questions about the business case for diversity. The list of business benefits of paying attention to diversity issues reported by interviewees were those that are commonly advocated in management literature such as those outlined in the literature review, although the specific elements of the business case varied from organisation to organisation. Wanting to be an ‘employer of choice’ was also a very frequently cited benefit. However, the most commonly cited business case for diversity was to gain a workforce that was better reflective and/or representative of the customer/service base, and thus improve customer service. Some interviewees were more able to quantify the benefits in terms of direct ‘bottom line’ effects depending on the nature of the business, although most recognised that benefits were largely qualitative, intangible and had to be seen as long term agendas.

The one aspect from the interviews that was seen to differentiate the diversity management from equal opportunities approach positively was the way in which customers and service delivery issues were now part of the agenda rather than perceptions of the conventional ‘equality’ focus on internal staff. The extent and nature of this customer/service delivery focus varied depending on the organisation. For example for some public sector front line service providers such as the police force, the diversity agenda was clearly about improving engagement with community groups. For a charity organisation, the diversity agenda was predominantly focused around appealing to and

recruiting a more diverse range of volunteers. For retail and banking organisations, the need to understand and provide appropriate services to a diverse customer base required a dual strategy focused around engagement with communities as well as ensuring there was a representative workforce.

Only two of the interviewees voiced clear criticisms of the diversity approach and both of these were from the public sector. They were concerned that diversity was a ‘watering down’ of the equality approach and avoided dealing with some of the most difficult issues to do with discrimination and disadvantage:

‘I think there is a genuinely a very difficult package of stuff around equality of opportunity which, helps explain why there’s such enthusiasm for the term diversity... the difficulty I have with all of that is if you take away the rights perspective, that’s all it is. It’s just about lots of individuals being treated differently. And in practical terms what on earth does that mean? Because nobody can possibly respond to every single individual difference. You have to have some way of framing that so that you can take effective action. You can’t do everything so what do you do? And how do you decide what the priorities are? Probably then you have to go back to collectivity and structures of disadvantage. So, you have to be able to do both, [somewhere].’

However as is clear from the above quote, even these more critical voices indicated that both approaches were needed in order to work towards successful outcomes.

6.1.2 Perspectives on Policy Initiatives

The interviews explored the specialists and champions’ views on their own and organisational priorities for the equality and diversity agenda and their strategies for implementing policies.

As might be expected, with such a broad range of organisations, sectors and geographical regions covered by the interview sample, the specific organisational priorities varied highly from interviewee to interviewee. The role that the diversity specialists and champions were expected to take also depended on the development stage of policy

within the organisation. For some organisations, at early stages of policy development or revision, the specialist or champion took a pivotal role in writing policy documents and setting the policy agenda. Within other organisations, especially those further down the line in terms of policy development, the role of the champions and specialists was more to embed policy within organisational practice.

Interestingly, it was clear that regardless of the specifics, policy priorities still mainly revolved around the five group-based issues of gender, race, disability, sexuality and age, despite the general movement towards individual differences within the organisations' talk about their equality and diversity policy. Within this, race/ethnicity and gender were generally given highest priority in most organisations. The gender imbalance within organisations and women's progression into senior levels was mentioned specifically by the majority of interviewees, around which specific initiatives had been introduced. The need to keep in line with incoming legislation was also clear, indicating the continuing link between legal compliance and equality and diversity policy. Interviewees were asked what they considered to be priority areas for the next five years and dealing with an ageing workforce and the implications of the new legislation on age discrimination, as well as responding to the DDA were mentioned frequently. In the public sector, the need to respond to the public duty requirements regarding race, gender and disability were also cited. It was also clear that common initiatives associated with the typical equal opportunities agenda were also the mainstay of policy interventions, including such things as; diversity training, dissemination of information on people's rights at work, diversity events designed to raise awareness of different communities, networks of support for specific disadvantaged groups, and positive action initiatives such as women in management programmes. These interventions were still clearly viewed as part of the modern equality and diversity package.

Flexible working patterns and work-life balance were perhaps one of the areas where some broadening of the agenda was seen. It was in this area that there seemed space to move the policy beyond simply coping with existing commitments in order to fit into the organisation, towards actually changing the organisation, thus perhaps indicating a more transformative agenda. Many interviewees spoke of the need for long hours cultures to be

changed. One diversity specialist related an example of ensuring that managers were not setting a poor example to their teams by working excessive hours. Others were aware that flexible working needed to be open to anybody rather than just women with caring responsibilities in order to have a broader transformative effect:

‘One of the pieces of work we’re doing at the minute... was to open up our flexible working policies, so that they’re actually open to everybody... I think there’s much more flexible working goes on than we know about, and I think it is much more widespread and it’s men and women.’

If on the whole however, policy priorities remained mainly consistent with those of a more traditional equal opportunities agenda then it was interesting to question whether taking a diversity approach had led to changes in the way in which policy implementation was approached. A theme which recurred in the majority of the interviews was a need for diversity issues to be integrated within mainstream business, rather than being separated. One interviewee used the metaphor of aiming towards diversity being like an ‘IntelChip’ within organisations:

‘Until it’s threaded through everything and becomes a natural part of every lesson that recruits have to go through... it’s never going to be meaningful... Why do we have an EO diversity policy that’s separate? Because it puts these things in a little block all on their own. Whereas it should be part of the general way we work.’

‘... what we’ve been trying to do is to make the equalities just part of everyday life. So it’s part of, you know, as you’re managing performance equalities is a fundamental part of that... because most people have incredibly heavy workloads... and if... you make them feel that it’s an add-on and not a fundamental part of what they’re doing... [they won’t do it]’.

A particularly important situation to avoid was that equality and diversity was seen as something ‘done’ by the HR department. ‘Taking diversity’ out of HR was something that was frequently mentioned by interviewees. It is interesting to note however that responsibility for equality and diversity, and reporting lines from diversity champions and specialists tended to be most frequently based within HR. In many respects this reflects

the historical situation of equal opportunities being a core task for the Personnel function, but it was clear that this might be changing. There was a significant minority of organisations where equality and diversity was situated within other parts of the organisation, for example, Corporate Social Responsibility or Corporate Ethics, or within diversity functions that sat completely separate from HR. In some of these cases, interviewees had no direct reporting line through to HR at all.

More generally, regardless of where the diversity function was situated, there was a shared view that responsibility for diversity needed to be decentralised or mainstreamed. This generally concerned the implementation rather than the development of diversity policy, although many interviewees did emphasise how important it was to get wider feedback and ideas on policy as will be discussed in the next section on stakeholder involvement. Strategies for dealing with the mainstreaming of diversity issues obviously varied from organisation to organisation, but it was very common for diversity ‘champions’ in the different business sectors or departments to be appointed. These champions were often senior operational managers and would be asked to take on responsibility for dissemination and implementation of diversity in their own business area.

Another common theme to emerge from the interviews was a need to move beyond dealing with the effects of discrimination and raising awareness to actually changing attitudes and behaviours of people who act as obstacles to equality and diversity. Part of addressing this connected to dissatisfaction with traditional equality and diversity targets and measures. This was a debate that also emerged at the project workshop where participants discussed the difficulties of measuring equality and diversity outcomes and the methods of measurement. On the one hand gathering data on workforce composition and monitoring the impact of policies on different groups was seen as the foundation stone of policy initiatives in most organisations. However, for some, the requirement to monitor led to a level of over-bureaucracy and ‘red tape’ which in itself was a barrier to equality action, what one workshop participant termed the ‘tyranny of measurement’. Participants also believed that monitoring in organisations was at different levels of comprehensiveness. Some still required basic statistical information on numbers of

women, minority ethnic, disabled employees and where they were located in the organisation, whereas others could focus more on patterns of promotion and pay. Therefore, there could be no 'one size fits all' audit and measurement mechanism. In addition there was a real desire from many interviewees for movement away from simple statistical targets to more qualitative audits that looked at the process and outcomes of practices and structures within the organisation.

Therefore interviewees commented that attention should be focused on what the implications are of audit data for changing structures and practices. It was interesting to note the significant number of interviewees who offered examples of policy interventions that were serious attempts to move towards trying to break down long established ways of doing things that may have traditionally meant that equality and diversity issues were not addressed. As an example, one Diversity Champion in the public sector related how once she discovered the extent of business that was being conducted in the pub between senior male colleagues, she put in place protocols that challenged this, by requiring that all business be done at formal meetings and minuted.

'You're never going to stop people talking about work [down the pub] ... But what you can do is make them accountable and transparent. And that means that... they may well have discussed what they like in the pub, but the protocol would require them to go back through the appropriate group [to put] that decision through'

6.1.3 Perspectives on Stakeholder Involvement

Interviewees were in no doubt that commitment to equality and diversity at the most senior levels of the organisation was a pre-requisite for successful action, and almost all interviewees cited the support of their CEO in pushing forward the agenda and supporting their efforts. In some contexts, a change of CEO had led to a real impetus to the equality and diversity agenda, and the movement away from traditional equal opportunities to diversity management. The support of very senior management was seen as crucial, to give the equality and diversity agenda legitimacy, to enforce behaviour change and to make the kind of necessary political and cultural challenge that would lead

to positive outcomes. Top commitment was thus important in supporting the diversity specialists and champions in their roles.

However, senior level leadership was not viewed as sufficient, and just as important were efforts to ensure that people were involved throughout the organisation. This clearly related to the earlier point that interviewees believed it was necessary to mainstream diversity across the organisation. The dangers of commitment coming from only the senior management was illustrated by the experience of one interviewee who spoke of the positive outcomes she had gained from an initiative she had led to increase the number of women promoted to senior levels:

‘... by the time I left 18 months later, every single one of those women was on a specialist path. But, the down side of it is that the minute I left it reverted straight back to the way it was before.’

So the majority of interviewees commented that ‘leadership’ of equality and diversity issues also had to come from all levels of the organisation, including crucially, line management and non-managerial employees.

Lack of wider ‘buy-in’ to equal opportunities and diversity management and ingrained negative attitudes were seen as serious barriers, particularly at line management levels, which some interviewees spoke of as the ‘permafrost’ or ‘marzipan’ level within their organisations. However, most interviewees indicated that rather than vilifying line managers, there had to be more understanding about *why* they were often so resistant, which may then lead to actions that might facilitate their involvement. Line management resistance was felt to be caused by prejudice, fears of loss of power, lack of training and the heavy demands on line managers’ time and resources:

‘I think sometimes you sort of need to be reminded of the fact that the priority for a manager won’t always be diversity.’

‘They understand why they have to do it but there’s always something else fighting for time, space and resource, and budget, which has been an issue for us.’

In addition, many interviewees spoke of the ways in which having a more diverse workforce made things more difficult for line managers and therefore increased their workload:

‘They feel it’s more time consuming to try and work on a more diverse project, it takes time engaging with communities and I think like everybody else they just don’t have the time so they maybe do feel a bit negative towards it.’

‘[You’re] asking them, to manage in a more complex way. Asking them to start managing more flexible working arrangements or virtual teams or home working, so you are asking them to change habits of a lifetime in how they communicate, you know, how they performance manage.’

‘The challenges around diversity ... if you do it well it becomes messy. And you’ve got to be prepared to go with mess, as well, and still maintain performance. So for instance, if you are happy to accommodate flexible working practices, to support people’s work/life balance, then what you end up with is people who aren’t visible at their desks at the time that you wanted to check that they were there. And who aren’t logging on logging off. Might actually do some work in the evening. It might not look like what you expected it, but what you’ve got to be able to do is see your way through and have, and set up the management controls that mean that you’re getting the value out of that person that the organisation deserves. But it’s a messy way of working’.

Such perspectives also acknowledged that the diversity agenda, perhaps even more than traditional equal opportunities posed greater threats to managers because it dealt with identities and asked people to directly confront their own prejudices and viewpoints:

‘I think the threat to leaders and the threat to colleagues, is ironically that people have to be more of themselves. And you have to give personal disclosure in order, you have to give more of yourself in order to be effective in leadership generally, and on this particular subject, you have to understand it, internalise it, get your own personal examples in your life, and therefore disclose it to more people. And that’s quite threatening to lots of people.’

However in many organisations, it did not appear that the opportunities were there to openly voice concerns, particularly in the context of demands on time and resources and needing to meet performance targets. Many interviewees commented that there was fear about appearing to be seen as prejudiced or discriminatory and this sometimes meant that issues were not dealt with properly, with negative consequences for staff, such as BME staff not being given proper feedback at performance appraisals.

Diversity training is a common intervention designed to deal with some of these issues of buy in and changing attitudes and behaviours, and all of the organisations represented had some form of diversity training programme in place. This varied highly from organisation to organisation depending on whether it covered all employees or was only for management staff, whether the training was delivered centrally or by departments and sectors, whether it was face-to face courses or individual online courses, and whether it was mandatory or voluntary. The pattern for most organisations was of a limited amount of ‘sheep dip’ training for all, often as part of induction programmes, and then more targeted training for different levels within the organisation, often on a voluntary basis. However there was no consensus about what was the most appropriate way to deliver training, with pros and cons of each reported:

‘Where equalities training has been most effective is where it has been done within teams... But the problem of that approach is, while it has been very popular and very effective, the danger is that it means that different parts of the [organisation] are operating different standards in terms of what they are teaching their staff.’

‘I do not believe in the sheep-dipping of everybody and taking everybody off. A. because you can’t do it, it’s too expensive. B... I think what we need to do is do a lot more integrated training... something that people feel relates to you know what they do on a day-to-day basis.’

Interviewees often claimed as in the quote immediately above that limited resources were often a direct obstacle to more extensive and integrated training programmes, which offers an explanation for the commonly reported method of short online training for most

staff. The problem with this trend as the interviewee above goes on further to discuss is that it does not deal effectively with the need to challenge people's behaviours and attitudes which arguably requires more space and time for open discussion:

‘If money was no object I'd love to [have] some of the more interesting and challenging programmes... To give people that chance to go on to courses where we can really talk about much more about what people's beliefs are and what their issues are and what their concerns are’.

Interviewees also commonly spoke about the need for diversity targets to be part of performance appraisal in order to lead to changes in behaviour and attitudes. Most organisations represented had some form of diversity criteria in performance appraisals for managers, while a large number had diversity objectives for all staff. Some organisations had even moved forward to directly link compensation to elements of diversity performance, some around diversity behaviours. Generally interviewees were positive about the principle of this, although they did recognise the difficulties of establishing meaningful criteria around diversity objectives (viewed as more difficult than traditional equal opportunities targets):

‘Now if you... talk about equality of opportunity, then you can put that into the language of performance management. So if you've got equality of opportunity right then you expect the outcomes to reflect that and if you see it in the outcomes this is what we expect to see ... I think if we started to talk about working with diversity, what you end up with is such loose and woolliness that says we're just trying to make sure everyone gets what they need, is not the same as saying well how do we know that this group isn't getting disadvantaged.’

In some organisations therefore, interviewees were concerned that the processes rather than just bottom line results should be assessed, attempting to achieve broader change within the organisation:

‘[We need to] move on to the how as opposed to just purely on the bottom-line... I do think you need to make the view that it isn't at any expense... when you've got 2 managers and you've got one manager that's reached his bottom-line results

but half his team have walked. And another manager that's actually done the same but he's actually got a stable team. Now the one that should be really rewarded is the second one. And the first one should be challenged and said, well you've done it by working people into the ground that's not acceptable. I mean there are some of those discussions need to be had.'

The interviews also explored perspectives on the different possible ways to involve non-management employees in equality and diversity policy. All interviewees commented on the importance of consultation with employees about equality and diversity issues, as was summed up by a quote from one interviewee:

'[There is] a tendency to do things from a central point of view or senior management point of view, that you think is going to be what's needed. And the reality is something slightly different, is actually going to be what makes a difference... I remember meeting somebody a little while ago. Talking about what the issues for particular ethnic minority groups were. And one guy saying to me, I don't really care whether people know what I eat, or what I like to do in my spare time or about my religious observance particularly, unless it's necessary for my work. And therefore, you know, that was an interesting concept cos you thought, everybody produces this wonderful great cultural awareness guides with all the sort of minutiae about different cultures and different religions, but, this guy was saying that's not important... And I think in that way it helps you develop something that people actually feel that they can use and is meaningful. As opposed to doing a lot of work that people sometimes will also feel is quite patronising.'

The most traditional way in which non managerial employees have been involved is through trade unions. The majority of organisations represented in our interview sample had recognised unions. We were interested in probing beyond just mere recognition however to look at the nature of engagement with unions, and found that this varied highly between organisations.

At one extreme, there were a number of organisations where trade unions clearly played a significant role in the development of diversity policy, in advising on future priorities, in communicating and disseminating policy to employees, and in helping to deliver policy outcomes. These arrangements were more typical within the public sector, where trade unions had representation on strategic decision making bodies and were consulted regularly and proactively. One interviewee spoke positively of the change in relationship that had occurred with the trade union which had led to particular benefits:

‘When we do things now and we consult earlier and they agree with it, they help us implement... obviously they, quite rightly, want to mitigate the effect upon, certain employee groups... Albeit we’ve got business objectives to meet and they understand... it’s our business strategy and they can’t change the strategy but they can change- help us implement it, effectively... And if we do, are doing something that’s stupid then they tell us. And we don’t get too far down the tracks. So it’s good... We don’t consult, we involve them in coming up with the policies. So we wouldn’t say, we’ve come up with this what do you think? We would involve them in coming up with it.’

By working with the unions the organisation was gaining extra resources, at little expense, for the equality and diversity area. At the other extreme were organisations that did recognise trade unions, but had not even considered involving the unions at the level of policy development and did not see them as useful business partners in this area:

‘On the basis that I work from, ‘here's something we prepared earlier’, when we're talking to the trade unions, rather than getting them to help with the design. Yes they can contribute to it but this is the way that we will do things around here. And, frankly I don't think there's anything in our policy and what we're trying to achieve, that the trade unions will have nothing but support for.’

In the middle was the largest group of organisations that do recognise trade unions, but interviewees have mixed experiences of working with them on equality and diversity issues. Some organisation champions expressed in principle support for union

involvement, even though this had not actually occurred, especially at the more strategic levels:

‘I mean I think at the group level, we probably wouldn't have union representation [on the diversity steering group] because we haven't got union representation right across the board in [the company] ... *My view would be that it would probably be very useful or if not, that you would have a very direct partnership with the union. Because my experience from other places that I've worked, is that the union can be incredibly helpful. Because most of the work that you do around diversity the union supports.*’

For some, the union was seen as weak and non-participative locally, or even disruptive:

‘I think the unions seriously need to think about their contribution on this agenda. Cos [experiencing] them [the bit of] them I've seen [] is almost always anti-cooperation... Whenever we're developing policies they will be part of the consultation process. But... if you do it as a really sound process you never hear anything from them... But then if you then go through a process of developing and think Oh must ask the unions what they think and send it, you then get Oh you haven't asked us early enough we haven't been involved in this and you must stop this, is where they then come from.’

For others, the experience of working with unions was very variable, for example, one private sector specialist reported general levels of relatively poor working relationships, but some individual instances of joint working on particular issues, such as an externally funded project to look at harassment and bullying.

Interviewees also reported a range of other indirect staff involvement mechanisms, some of which worked alongside union channels, or in some of the non-unionised organisations acted as an alternative to unions. Many of these were designated equality and diversity groups or networks, although the range of these varied between organisations, for example some had employee groups representing the major equality strands, while some expanded this to include groups based more around identity and work life balance issues (such as for working parents, specific ethnic groups or faith identity groups).

There was a very small group of organisations where interviewees' comments indicated had a very integrated, multi channel form of communication and consultation that genuinely seemed to be trying to engage employees proactively. It should be noted that where these organisations had union involvement, it was viewed positively and had more proactive involvement. Employee groups in these organisations were formalised structures with reporting channels to, and representatives on, the central bodies responsible for decision making in the diversity arena. Management and non-management employees could often participate on equal terms. The groups were also commonly resourced by the organisation both in terms of a budget and time for participants. Most importantly, it also appeared that these groups were seen as having significant effect on policies, with interviewees reporting changes made to policy documents, or initiatives put in place in response to feedback. Furthermore, efforts were made to communicate with employees more generally so that they understood the impact that such consultative groups had. For example, one private sector organisation released quarterly reports indicating how concerns raised by staff were responded to and acted upon.

However, the majority of interviewees did not report their organisations as having integrated and effective channels for employee involvement. Many organisations did not have any employee groups based on equality issues, although a couple of interviewees indicated that this was something they were looking at for the future. In many organisations, the groups or networks were employee-led, which on the one hand could be seen as positive in that the initiative comes from the employees themselves. However, such groups were also more likely to be un-resourced by the organisation and lacked any formal place within the equality and diversity policy and processes. Furthermore only certain groups of employees would be represented-for example, having an employee women's network or group or a race action group was very common, but other equality strands were often missing. Alternatively, interviewees reported that groups would form temporarily around the focus of the latest initiative, but would 'fizzle out' due to low participation. Therefore the impact of employee groups was uneven and unstable.

The most common form of employee involvement reported by interviewees were direct employee surveys, most likely to be general attitude surveys within which equality and diversity elements were included (although some specific equality surveys were also reported). The use of surveys varied between organisations, both in terms of the ‘weightiness’ of their content and in their operation. In some organisations, such surveys were followed up by focus groups and interviews, while others were much more superficial and probably less effective in terms of obtaining employee input. One interviewee pointed out the limited usefulness of staff surveys:

‘We’ve had the vexed and thorny issue of staff surveys to get feedback which in an organisation of 44,000 people is not the most efficient and effective way of trying to understand what’s going on across the organisation... the last time we had a corporate survey... by the time we got the results together and... thought what we could do, the organisation had moved a pace.’

Another interviewee commented on her concerns that a race perception survey within her organisation was not perceived as having any real impact on policy and practice because it was not seen as being taken seriously:

‘The race perception [survey]... was particularly important and I don’t think the response has been particularly as it should have been. I feel... and I am sure a lot of Black and visible minority ethnic staff certainly do that it was just done because it had to be done... one of the comments made at the race perception survey... really struck home was that you know, the focus groups and the presentation as a result to those staff at this focus group was very much done in a sort of dusty backroom with you know, not a great deal of, it wasn’t very high profile.’

Interviewees also reported a wide range of other mechanisms including company newsletters and magazines, publicity campaigns, intranet and web sites, diversity events and conferences, all of which were arguably about information and dissemination rather than consultation.

Earlier, the expansion of the diversity agenda to include customers and service delivery was discussed. In line with this, involvement/consultation mechanisms for customers and service users/recipients were reported in most organisations. Indeed, in some organisations, the level and scale of involvement with external communities far surpassed that of the internal workforce.

What is clear is that there is a significant minority of organisations where employees have very limited or superficial opportunities to get involved in diversity policy development, who have neither trade union representation, nor well established and effective alternative mechanisms for involvement. In one organisation without trade union recognition, the only involvement mechanism for the core workforce was the disciplinary and grievance procedure. Moreover, it is unclear exactly how much information employees at lower levels in many organisations will have about the diversity policy or its associated initiatives. One private sector specialist outlined the variability of knowledge across her own organisation, pointing out the difficulties of communication particularly with employees who are off site and working flexible hours.

6.2 Trade union equality officer perspectives

This section of the report is based on interviews with 11 national trade union equality officers. The role of a national trade union equality officer can vary quite considerably depending on the size of the union and the bargaining structure within the sector(s) and industry/industries it is involved in. For example, the equality officer of a smallish, single-employer union is likely to be directly involved in negotiations and bargaining and might also be involved in representing individual members in cases of discrimination. Also, many trade union equality officers have a role in building relationships with key decision-makers in organisations, particularly their counterparts – equality and diversity specialists – with whom they often develop very cordial and close working relationships. In contrast, the work of an equality officer of a large union is usually more concerned with producing policy guidance and providing advice and support to national and branch officials. Therefore the latter's involvement with actual employers and workplaces, is usually indirect.

6.2.1 Perspectives on policy approaches

The trade union equality officers' familiarity with diversity management as a policy approach varied depending on the sector(s) and industries their union is involved in. For some – particularly those dealing with the public and private service sectors and white-collar workers – it was clear that a large proportion of employers had switched to diversity. Others dealing with industries composed largely of SMEs or manufacturing companies typically reported that there was very little engagement with either equal opportunities or diversity management. All the trade union equality officers were familiar with the concept of diversity.

Interviewees were asked what they thought the shift from equal opportunities to diversity management means for the equality project. One view was that it was important for unions to distance themselves from the language change in order not be distracted by discussions about abstract concepts. Some believed that in practice diversity was simply a renaming of the traditional equal opportunities concept and therefore it was not worth

worrying about, with remarks such as ‘it doesn’t matter what you call it, it’s still the same thing’ or ‘language moves on’. One interviewee commented:

‘There’s a great deal of scepticism [in unions] about changes in terminology and, there’s a lot of doubt about whether it means anything different to what we’ve understood as equal opportunities, and so we within the trade union movement have been aware that within the human resources world there’s been a lot of talk about managing diversity, but we’ve very deliberately kept out of those kind of discussions.’

A contrasting view was that the language frames the policy debate and therefore it is highly important for unions to engage with diversity management because the language of diversity could be employed to redefine the policy agenda in ways that unions would regard as negative. A number of interviewees talked about the possibility for the more positive language of diversity to conceal ‘the realities of discrimination’. It was also felt that as a policy approach, diversity management is not problem focused. It was referred to by one interviewee as ‘rather cloudy’ and by another as ‘fluffy’ and most interviewees were concerned that it was not entirely clear what policy initiatives flowed from diversity. Reflecting these views, one interviewee said:

‘My perspective is that the language is very important actually Because I mean for me the language often indicates what kind of action is going to flow from that discourse. So there’s a lot of debate around the advantages of having a diverse workforce, but there is a real question about what that means and what it means that employers actually do as a result. So if you’re talking about discrimination, then I think you have to say that. An employer can achieve a diverse workforce and still have huge problems of racial inequality within it.’

Interviews also explored the equality officers’ opinions of diversity management as a policy approach. In particular, we were interested in whether they felt it to be progressive or retrograde and whether they felt it added anything beyond traditional equal opportunities. Again, there were a range of views from an unequivocal belief that diversity management is a step backwards for the equality agenda to qualified, if

sceptical, support. Reflecting the first view, in the next quote the interviewee rejects the idea that a new approach is necessary:

‘I think it’s a big mistake. I think you have to go back to the reasons why organisations adopt diversity strategies. The first is the idea that the equal opportunities approach has been tried and has failed. Secondly, that equal opportunities can alienate people – mainly white men – I don’t think any of those reasons are justified or true.’

Those who believed that diversity management is a step backwards were concerned about whether ‘managing’ diversity would actually address inequalities. They talked about the need to make a distinction between developing policies towards simply *having* or seeking to have a diverse workforce and policies aimed at tackling inequalities and discrimination, for example:

‘I don’t think you can manage inequality – you have to tackle inequality. [Sometimes] diversity treats inequality like a health and safety issue. You’ve got a broken window and all you need to do to tackle the problem is to put a new pane of glass in. Well you can’t fix inequality like that, you have to tackle the causes of it; you can’t just fix it.’

‘I wouldn’t want to detract from the equality agenda by having a softer term. I mean it [diversity] is a softer term.’

Those who leaned towards being more supportive of diversity management had continued to perceive the equal opportunities approach as essential, but did not think that this necessarily excluded diversity management. One interviewee said:

‘I don’t think it [diversity management] replaces equal opportunities and it doesn’t replace the legislation. It doesn’t replace the need to say that this is the bottom line – you will do this, whether you like it or not. There still needs to be that sanction, but if you can get people signed up to believing that diversity is positive, then you really don’t have too much of a problem. But, it’s quite sophisticated really as an idea, so it takes a degree of sophistication in the management, in the way management behaves. When managers themselves

sexually harass women in [the organisation], you're not in a position to even begin talking about diversity, are you?'

Taking a pragmatic view some interviewees felt that diversity management was a 'positive boost' to equal opportunities which was 'flagging' by the late 1990s. For these interviewees the belief was that diversity management and equal opportunities could be complementary, rather than mutually exclusive approaches. There was a view that in practice unions could marshal both discourses for different reasons – diversity management was seen as broader, more positive and proactive, while equal opportunities names discrimination and harassment and responds to problems.

Following from this and also in a more positive vein, some of the trade union equality officers welcomed, at least in principle, the concept of diversity if broadly defined. These interviewees saw diversity as part of a broader trend towards looking in a different way at the meaning of paid work and its place in our everyday lives. The concept of 'work-life balance' was mentioned in this regard. Also it was felt that the diversity concept allowed for a broader range of interconnecting and overlapping issues to become part of the policy agenda than the more commonplace emphasis on gender and race within traditional equal opportunities. It was pointed out that working within an equal opportunities framework, trade unions had until fairly recently neglected some groups and some equality issues.

Some of the scepticism, even from those who could see positive aspects to diversity management, related to the growth of what was termed an 'industry', for example:

'It's the new industry isn't it? I mean I'm not dismissive of it and I'm certainly not against it, it's just that I don't actually deal with it in a very concrete way. It's geared around the workplace and I think that anything that's promising to benefit the individual should be broadened from just the workplace because life is broader than the workplace.'

'I think the popularity of it [diversity] is because it is very easy to talk about and it is very difficult for employers to be pinned down to exactly what they mean. So you can have this discourse about the need for diversity and then you can talk

endlessly about what it means. There are all these conferences that people are going to, to find out what they are supposed to be doing – it's become a huge industry.'

The question that most trade union equality officers felt had not yet been answered in practice was whether diversity management could and would progress the equality agenda. To some extent the answer to this hinged on how easy is it to construct a business case for diversity, this being one of the main features of diversity management.

Interviewees highlighted how organisations and unions often have different perspectives on the business case. Since the unions' job is to seek to eliminate discrimination, their business case argument typically stressed the costs to business of discrimination in terms of legal challenges and damage to reputation. However, given the relatively low penalties employers face in discrimination cases, this argument might not always be convincing from the point of view of a cost-benefit analysis, as one interviewee suggests:

'We say to employers that we share with them an interest in removing inequality from the workplace – we do this because for us then all the workforce is united and for employers there are all the productivity arguments. Now, it's where you come at that discussion from that has been critical in the last few years. I think we're coming from the discrimination side of it, which I think is right for the trade union movement, but I think the employers are coming from a totally different viewpoint.'

In practice then, one of the challenges for unions, according to the trade union equality officers, is how to convince employers to take action on inequalities. In some contexts, putting forward business case arguments could be helpful to unions:

'I don't think there has ever been a huge amount of commitment to equality as such – I think it's always been business driven. But I suppose what diversity might have done is to strengthen the business argument so that it's seen as much more of a mainstream issue, which is good, so I think some of the language of diversity has been quite helpful there, rather than negative.'

‘We have accepted for well over a decade that if we’re going to get anywhere in talking about equality, we have to talk about the business case and so the other side, the moral side, takes a back seat. ... everybody who works in organisations knows that trade unions want to see their organisations prosper, so I’m not saying that the business case is phoney.’

Some of the interviewees could think of strong business case arguments in the industries their unions were involved in, for example labour shortages in engineering, but others struggled with this and came back to the more abstract, less quantifiable notion that if diversity is good for business, then discrimination must be bad. The following quote makes it clear why the business case rationale for diversity is partial and contingent and why most of the trade union equality officers considered this to be one of the major weaknesses of the diversity management policy approach:

‘I think the business case has always been harder to make in manual, blue-collar work than in middle-class, professional work. You start talking about the cost of recruiting someone who’s doing, say, packing, and how much recruitment will cost and employers say “I can get a packer tomorrow”, whereas in some professional work the costs could be very high.’

6.2.2 Perspectives on policy initiatives

The interviews explored trade union priorities for the equality and diversity agenda; that is what they would like to see employers focusing on. A fairly traditional range of equal opportunities issues was cited, including equal pay, low pay, sexual and racial harassment, childcare provision and costs, the ‘glass ceiling’. Also, various forms of discrimination on a broad range of grounds including race/ethnicity, religion, gender, disability, age and sexual orientation were all mentioned as trade union issues. In addition, there was great concern about the possibility for discrimination to be practiced and concealed within various individualised human resource management techniques, including performance appraisal/ratings and individual performance related pay. The latter was proving to be the most challenging area for unions to deal with precisely because of the individualised nature of the techniques involved.

The general belief was that the trade union priority was to work on the issues mentioned above, trying to convince organisations to develop policies to tackle these problems and to enable certain groups to ‘catch up’ before moving on to a more positive ‘valuing difference’ policy agenda. As one interviewee said:

‘I shan’t be racing towards embracing the diversity agenda because I don’t think we’ve sorted out some of the key issues, but at the same time I’m very open to getting into some broader issues, but I’d like to see us ticking off some milestones first.’

One milestone mentioned by some interviewees was policies to tackle sexual and racial harassment which were described as rife in some industries. Another view was that sometimes it was possible for trade unions to engage organisations in their policy agenda, particularly if the initiatives were framed in a way so as to appeal to employers. One interviewee explained an example of working jointly with an organisation on work-life balance, which had long been one of the union’s key priorities:

‘Sometimes things start off as a window-dressing exercise, but that gives us the opportunity to push them towards things we’ve wanted on behalf of our members. An example of that is what we’ve done on work-life-balance. This is something that the union’s been banging on about for donkey’s years. We did a campaign about it and shared it with some of the senior people in [the organisation].’

The interviews also explored the trade union equality officers’ perceptions and experiences of organisational policy initiatives. There was some concern that organisations typically favoured high profile initiatives that served to improve their image, rather than ones that focused more on rights and benefits for employees. One interview put it bluntly that employer priorities were ‘more about winning awards and improving the image of the organisation’. Interest in ‘lifelong learning’ and ‘Investors in People’ were cited as examples – not as bad initiatives *per se*, but not as the highest priority, from the trade union perspective, yet ones where there was a lot of employer activity. There was also some concern that employer initiatives were not concrete enough and that specific targets had typically been abandoned in favour of more broadly defined

goals, such as a stated commitment to ‘value diversity’. In line with this, some interviewees mentioned cultural awareness programmes, which again were not seen as bad initiatives *per se*, but not as the priority issue:

‘You can get people to understand what festivals one particular religion might have – you can do that forever – you can share different types of food, but it doesn’t mean that someone isn’t going to call you a black XXX the next day. It doesn’t mean that someone won’t be denied equal pay in the workplace because of the colour of their skin.’

Although there was no disagreement that cultural change is necessary in the long term to make the workplace more equal, interviewees felt that the more regulatory approach of traditional equal opportunities continued to be necessary, and what is more, would always be necessary. Even where targets were set and specific policy initiatives developed, some interviewees perceived that it was cheap and easy initiatives that were favoured. For example, the following quote talks about organisational efforts to redress under-representation:

‘It would seem very much easier to do direct recruitment to fill senior posts to achieve greater representation than it would to develop talent amongst your own staff, which needs longer term and sustaining developing. But I think they are looking for quick wins and quick fixes.’

However, the trade union equality officers were not completely cynical about organisational policy initiatives. Some said that there continued to be a lot of activity in the area of equality and diversity and some were quite approving of organisational policies, for example:

‘At the very least employers are aware of their fundamental legal obligations and others are going beyond that, particularly those employers who are talking about diversity, they’re probably also the ones who have been relatively good on equal opps. Now I’m not trying to paint a picture of a rosy world out there, but I’m just trying to say that I just don’t discern that all this discourse about managing

diversity means that employers are giving any less attention to what we understand as the old fashioned equal opportunities.’

In summary, most trade union equality officers considered that a kind of hybrid policy model was developing, containing many elements of traditional equal opportunities, while at the same time many of the aspirational statements associated with diversity management.

6.2.3 Perspectives on stakeholder involvement

With regard to stakeholder involvement, one significant priority for the trade union equality officers was to get workers involved in setting the equality and diversity agenda, for example:

‘Part of the challenge for me has always been to actually try and educate people about what the reality is of people’s working experiences. And also to try and organize those people to actually intervene in the debate and in the process and say what they want. Because I think one of the things that does happen, especially around debates about race is that everybody says what shouldn’t happen. But there isn’t a lot of debate about what should happen.’

The above quote reflects a dominant trade union view that employees, as recipients and potential beneficiaries of policy, are the ones who are best placed to identify priority issues that concern them. This does of course stand in contrast to the top-down approach of diversity management and seems more aligned with traditional equal opportunities where there is theoretically more space for activist and employee perspectives and input.

Diversity management emphasises the role for line-management in implementing the policy on a day-to-day basis; therefore the trade union equality officers were asked to what extent they thought line-managers ‘bought into’ diversity management. A widely held perception was of senior level commitment, for example:

‘I would say that [the organisation] has a genuine commitment to equality – now I’m talking about the people in charge, at the very top. I think there are real problems when it comes to rolling it out to the field [line-managers].’

However, as indicated in the above quote, interviewees were less convinced of line-managers' commitment to diversity management policy goals, even when couched in business case terms:

‘Well I think it’s [the business case] a very good thing. I mean there’s all sorts of ways to demonstrate a business case within [the organisation], but I don’t think the concept is well understood by managers. Somehow the business case never seems to ring true to the finance director or whoever.’

Given the top-down approach of diversity management, the interviews asked the trade union equality officers to talk about the extent to they thought that diversity management threatens trade union involvement in equality. Although they could all see the potential for this to happen in theory, actual experiences and observations were more variable.

To begin with, depending on industry and sector (but especially in the SME sector), some interviewees stated that in their experience equal opportunities had never been on the organisational agenda anyway, so they had not seen a decline in union influence; the problem was more that they felt the unions had historically lacked influence on the equality agenda in organisations. However, most interviewees considered that equality was less of a collective issue now, compared with 20 years ago, in terms of how organisations deal with it. For example:

‘In the early 80s when I was doing this stuff as a negotiator in [the organisation] it [equal opportunities] was very much a collective issue. It went to the negotiating table and it was very much part of the mainstream bargaining agenda.’

Some interviewees had specific examples of lack of consultation with unions when organisations were introducing a new policy approach (for example shifting from equal opportunities to diversity management) or a new policy initiative with equality implications. Most pointed to the overall decline of national level bargaining and union influence in most sectors and industries. One interviewee described the union as a ‘junior partner’ in developing the equality and diversity policy in the late 1990s in one major public sector organisation, in contrast to the joint working approach of the 1980s that was institutionalised through a joint union-management equal opportunities committee.

However, most interviewees believed that unions still have the opportunity to shape the equality and diversity agenda, stating that the warmer political climate since 1997 on the election of a Labour government had made it easier for unions to participate in advising on and implementing equality and diversity in the public sector at least, where the agenda is in part driven by Government policy. Some interviewees stated that it was clear that unions could sometimes be useful to the organisation in legitimating new policy initiatives, so management would seek union support and collaboration. In addition, most equality and diversity professionals were described as very committed and they often worked together as mutual allies:

‘Our approach has always been to be practical and to try to build longer term relationships [with employers], so you’re looking at trying to establish mutual trust and respect.’

In terms of the nature of union involvement, the trade union equality officers highlighted the value (as they saw it) of ‘bottom-up’ pressure:

‘I think the fact that there is a very active union in [the organisation] has bound to have had some influence there. I think it has prevented them from going off and thinking everything’s wonderful. We keep bringing them back to the evidence ... to the realities of what’s really going on, which I think is one of the functions of the union.’

‘[Employers] didn’t wake up one day and decide that they should have an equal opportunities policy. You know, that happened by and large because black workers in the workforce said “we think you should have a race equality policy and we want to talk to you about what it’s going to say”. So people actually making very clear demands about the things that needed to change and what they wanted to see in their place and I think that’s part of the way that progress gets made.’

The establishment by some organisations of employee networks (e.g. women’s, black and minority ethnic etc) operating outside of trade union structures, could potentially threaten or undermine the role of the union. Many of the trade union equality officers had

experience of such networks and there was concern that they are not democratic, that there is no clear system of accountability and it is not always clear who participants speak for. This employer-led initiative had proved quite contentious when organisations first set up networks, but most interviewees felt that the controversy had now settled because the unions' fears that the networks would take over their role do not seem to have been realised. One interviewee noted that it was ironic that when unions had called for employee networks in the 1980s, they were called separatists; now many organisations, are establishing such groups in order to involve diverse employees in the equality and diversity policy.

Essentially, the trade union equality officers perceived equality and diversity as a collective issue and on this basis continued union involvement would be important:

‘I mean it’s all about collectivism, isn’t it, you know, if one person has that problem then that becomes a collective issue, hypothetically you can bargain on it.’

From this perspective, the union role would be to attenuate the potentially negative consequences of individualised human resource management techniques, identified earlier as potentially responsible for discriminatory employment outcomes. The interviewees highlighted the way in which unions use individual cases to make collective gains, to improve the working lives of employees, for example:

‘We did a tribunal case for some profoundly deaf members and as a result we got an agreement which set out step-by-step all the things that the employer could reasonably be expected to do for them, in terms of giving them access to training with signers, making sure they knew what was going on, a whole range of measures. We were able to use that case to say to them [the organisation] that these are the kind of measures that we expect you to provide on a whole range of disability issues.’

‘You know, with the best will in the world, there is always somebody that can do individual representation better than trade unions. That only makes sense if you

are taking a collective aspect on those individual problems and trying to ... stop those things from happening in the first place.'

6.3 Other equality and diversity professionals' perspectives

The analysis in this section is based on interviews with a small number of people (seven) categorised as 'other equality and diversity professionals', including diversity consultants and representatives of relevant campaign and official bodies. The interviewees in this category worked in a variety of different organisations and contexts and their roles included advising and supporting employers on equality and diversity issues/policies and campaigning and lobbying. Their backgrounds were equally varied – some had formerly been trade union activists or officials; some had extensive business and management experience; some had both. Their perspectives are interesting because they have broad-ranging knowledge and experiences of organisational policies based on their current and previous roles.

6.3.1 Perspectives on policy approaches

Interviewees were asked to talk about their views of the shift from equal opportunities to diversity management. There were mixed views, often expressed by the same individual, with most pointing out that diversity can mean different things to different people. One perspective was that diversity management was simply an example of language and conceptions evolving, rather than something fundamentally different from equal opportunities, for example:

‘I’ve always thought that diversity is just an extension of what we’ve been calling equality of opportunity and that all the good practice that came about in terms of gender should actually be the models then for a much more diverse workplace and society.’

From this perspective, the interviewees saw policy-makers continuing to develop new initiatives and consolidate older ones, much as ever. In practice, the interviewees typically saw equal opportunities and diversity management as policies that work in tandem or even that cannot be separated. One expressed this as equal opportunities being about rights and legislation and diversity management about the individual and the multi-faceted nature of identity. It was the latter notion that most interviewees felt represented

the strength of the concept of diversity; that is its more inclusive nature. However, this greater inclusivity could also be a weakness, possibly causing a dilution of the equality agenda or a lack of focus:

‘It [diversity] is more complex [than equal opportunities] and that makes it difficult to sell. But there’s all this about multiple identities which New Labour keeps telling us about – we have all got multiple identities which is true. But some of those identities have actually, I think, more relevance to us than others.’

Following from this, there was also a strong view that diversity management, firmly underpinned by the business case, signalled a departure from some of the traditional principles of equal opportunities:

‘It definitely makes it more commercially acceptable to talk about. And I hear people talk about it that wouldn’t talk about what they would see as old-style equal opportunity. But I think the downside is that I think it definitely has watered it down a lot ... you know everything’s somehow all different ... we’re all completely different therefore we’ve got diversity.’

However, the business case was not *necessarily* seen as a weakness of diversity management, although interviewees thought it could be. From the experiences of some interviewees, it was clear that they felt the notion of a business case was encouraging many organisations to develop policy initiatives. The message that interviewees were passing on to employers was that equality is ‘the right thing to do’, but it also makes business sense. It was argued, for example, that a business-led approach encourages organisations to compare their policies and practices with those of their competitors and that this in turns promotes the spread of ‘good practice’ as more organisations come to believe that good equality and diversity practice is essential for competitive edge. Nevertheless, not all interviewees were quite so optimistic and there was some questioning of employer motives and some concern that organisations did not always go about policy implementation in the right way:

‘Is diversity more about protecting the firm’s reputation as opposed to actually promoting a diverse workplace?’

‘I’m asked to go into an organisation very often because they want the business case to be explored and developed. So the first person I meet is the equality specialist. Now, you tell me ... if they believe it makes business and organisation sense to develop that talent, who should I be meeting? Who should be driving this? The chief executive, the managing director, the finance director and so on.’

The above interviewee was not arguing against a role for equality and diversity specialists, but simply pointing out the irony inherent in establishing an implied and immediate distance between the core of the business and equality and diversity issues by not having business leadership of the policy. Other interviewees spoke about the need to disconnect diversity from HR in order to embed it in the business goals of the organisation. In this regard there was some favouring of the positioning of diversity management within the broad business policy area of ‘Corporate Social Responsibility’, rather than within HR. Some felt that the time was now right to do this because they detected a greater interest from organisations in the relationship between the equality and diversity agenda and service delivery.

The interviewees also had experience of organisations that were not engaging with the business case for diversity, especially smaller firms, and here traditional legal arguments were necessary, but at the same time seen as insufficient to really make a difference, for example:

‘I keep saying to customers “You can’t gold-plate your organisation against bits of legislation, there is too many bits of them now”. Because you’ve got the six equality directives ... and that’s a basket of HR policies that are across the organisation without saying “we will give that person a reasonable adjustment because they are covered by the DDA, but we won’t give this one, because they are not”. I mean, that’s stupid and a sort of lawyer’s view of life, which is not the way you should be running organisations.’

Most of the interviewees talked explicitly or implicitly about the dilemmas and tensions within diversity management (outlined in the literature review) and much of their effort seemed to be geared towards encouraging, supporting and helping organisations to

reconcile these, particularly with regard to the involvement of line-managers (discussed later). There was a strong belief that prevention of discrimination should be the aim, rather than focusing on legal remedies and redress for individuals.

6.3.2 Perspectives on policy initiatives

When talking about their views of policy initiatives, some interviewees repeatedly used the expression ‘one size doesn’t fit all’. Within the business case approach to policy it was considered important to encourage organisations to take ownership of policy initiatives and therefore in their roles some interviewees were keen not to be seen to be imposing solutions on organisations, but be more geared to helping organisations find their own solutions. This perspective represents a departure from the traditional, bureaucratic approach to equal opportunities which urged all organisations to adopt more or less the same rules and procedures. The interviewees expressed a preference for a more nuanced and flexible approach to policy-making that they felt would encourage organisations to properly implement initiatives. The possibility for this approach to conflict with conceptions of ‘best practice’ that the interviewees also talked about, should be noted.

While the interviewees in this category were advising organisations on diversity, their view of the interconnection, if not complementarity, between diversity management and equal opportunities meant that most continued to promote the benefits of certain traditional equal opportunities practices. For example, rigorous monitoring of workforce diversity was seen as essential for all organisations in order to ensure the policy was having the desired effects. The following quote explains how monitoring can help identify problem areas:

‘One big organisation I was working with – roughly equal numbers of men and women coming in at a certain level and then at a higher level it’s just virtually no women. The assumption was well they’re leaving and having children. Actually when we looked at the data that wasn’t what was happening at all. They were entering in equal numbers, but very quickly the men were being promoted faster, the first couple of years. So actually by the time the women had been in the

organisation a while, before they were even thinking about whether they wanted to have a family, they were already completely cynical.’

Interviewees were recommending that organisations monitor not only workforce composition, but the outcomes of the various stages of the application process too. Also familiar territory of equal opportunities was the idea of ‘mainstreaming’ equality and diversity issues that some interviewees talked about – ‘equality proofing’ of all organisational policies was seen as important (and of course a requirement for public sector organisations). One interviewee stated that in the wake of the MacPherson report on the police handling of the enquiry into the murder of black teenager Stephen Lawrence, large organisations do not want to be labelled as institutionally racist either in terms of employment practices or service delivery. Therefore, for a range of different reasons interviewees felt that there was now an opportunity to broaden the equality agenda, both in terms of reach (i.e. beyond employment practices) and scope discussed earlier (i.e. beyond gender and race).

Another traditional equal opportunity initiative that interviewees talked about was awareness raising training courses. It was acknowledged that training can be very costly, but some saw this as the key to embedding equality and diversity within the organisation. Others were less convinced of the usefulness of awareness raising courses, for example:

‘The problem is not raising more awareness. The issue is about delivering that [equality and diversity] in terms of mechanisms of change. It’s not rocket science, but it sums up a very fundamental contradiction between the policy and public statements and what’s delivered and therefore the credibility of the whole issue of equality and diversity in an organisation.’

The above interviewee was not arguing against equality and diversity training *per se*, but believed that time, money and effort should be spent instead on more concrete ‘mechanisms of change’, which needed to be identified in the context of each individual organisation.

One traditional, although not necessarily popular, policy initiative within equal opportunities is positive action. Positive action has always attracted controversy and

reflecting this, our group of interviewees expressed mixed views. On the one hand there was a belief that positive action can help to address embedded disadvantage, as two interviewees explained:

‘One thing I’m worried is going to fall off the agenda of diversity and equal opportunities is positive action. And it seems to come out of ... I always worry about this word mainstreaming which is again part of the whole diversity thing. And you know, to me mainstreaming is putting equality at the hub of your policy and practice, that’s it. Which isn’t to say treating everybody the same; it isn’t one size fits all. Positive action has to be there in terms of training programmes for people who are under-represented, for encouraging more people into the workplace.’

‘I guess some people would still argue that you can’t have a diverse workforce and treat everybody equally if you haven’t got a diverse workforce in the first place. So it may be that you have to have some sort of positive action policies if you are not an organisation that has a reasonable representation of women or minority ethnic groups or whatever. There may be recruitment policies like outreach or whatever. You might have to have policies targeting particular groups to make your organisation more representative. But then when people are in the organisation you don’t then single them out for any different treatment because they come from different groups. HR policies should be equal.’

The second quote reflects the more widely held ambivalent attitude towards positive action as an instrument of change. Newer management techniques now being incorporated into diversity management also created some unease. Individual performance appraisal was seen as both a potential instrument of change and a means of reproducing inequalities. Some of the interviewees supported the idea of diversity performance indicators being included in every employee’s appraisal, and as particularly important for line-managers. However, as one interviewee noted, it was generally felt that ‘the jury is still out’ on whether this mechanism will prove an effective one for embedding equality and diversity in everyday organisational practices. Potential dangers,

from an equality perspective, of individual performance appraisal were also suggested by interviewees. For example, in the next quote, one interviewee talks about her experience with one organisation:

‘Went into [the organisation] to talk to them about, to work with them on equality. [They said] “We have some of the young women graduates complaining to us that even though they’ve achieved the necessary sales targets ... their manager has called them to one side and said, well actually you’re not really a team player. Well why, because I’ve achieved all the requirements? Oh well because you don’t go to the pub three times a week with the sales team.” And that has become part of the appraisal process, this informal, cultural issue has embedded itself in what should have been a totally objective process.’

The above highlights the informality and subjectivity of the performance appraisal process and the potential for indirectly discriminatory judgements to be made.

We can see from the perspective of diversity professionals working with, but outside organisations, that effective diversity management for them means more than glib statements about valuing diversity and means having solid policy initiatives that are responsive to the circumstances of the organisation.

6.3.3 Perspectives on stakeholder involvement

The interviewees agreed that there was a need to move away from the idea that equality and diversity specialists ‘own’ policy and should therefore do all the necessary work. There was a perceived need to build relationships and alliances between specialists, HR practitioners, senior and line-managers. This section of the interviews explored perspectives on the relational aspects of diversity management and on the mechanisms that organisations might use to get all staff on board. Most of the interviewees saw top level commitment and leadership as essential. However, they believed that there is now genuine commitment to diversity at the most senior levels of public and (large) private sector organisations. They perceived gaining line-management ‘buy-in’ as the greatest challenge facing organisations. However, their reflections and experiences caution

against simply blaming line-managers for failure to embed policy, as the quote below shows when the interviewee alludes to the many pressures facing line-managers:

‘The big challenge, I would say for virtually every organisation ... is engaging the managers in the middle. And, that is very consistent within the private and public sector, central government; it’s the same thing. The leadership at the top – absolutely committed, want to do it. People at the bottom – oh please do something. And then you get the managers in the middle who are busy ... “I don’t need another add-on, I’m busy enough”. The challenge is how do we develop support for them and get it as part of how we do business around here.’

An apparent line-management reluctance to engage with the diversity agenda was also thought to stem from a lack of understanding about the issues and the policy:

‘I think in some places what’s happened is that management at the top, the chief executive, has said “Oh God we have to have a diverse workplace, so get on with it. So some middle management has to put something in place and they really aren’t sure what it is at all and it’s difficult then to communicate that policy.’

The everyday tensions and conflicts facing line-managers were mentioned and therefore, the importance of establishing a dialogue on equality and diversity:

‘But if you are valuing diversity and valuing the individual, sometimes you do have a conflict permanently or temporarily or whatever between people’s performance, between the needs of the organisation, between the rest of their lives ... Being able to talk to people, generate options, maybe occasionally involve a staff counsellor or mediator without feeling that as a line manager you are giving your power or something ... that is a set of interpersonal skills that line managers ought to have, but increasingly it is clear that a lot of them don’t have.’

As stated earlier, interviewees stressed the importance of monitoring, including monitoring the outcomes of processes that line-managers take charge of, such as performance appraisal and recruitment and selection. However, it was also felt that monitoring can feel like surveillance to many line-managers and therefore it was

important to get managers on board so that they would not interpret monitoring as ‘Big Brother’ watching them.

The establishment of a network of ‘diversity champions’ throughout the organisation was generally regarded as a positive step towards overcoming line-management resistance and achieving ‘buy-in’. According to our interviewees, these people needed to be carefully selected and would be recruited from among operational line-managers. Their role would be to model the types of practices and behaviours necessary to embed diversity policy:

‘You don’t necessarily have to be an expert on equality and diversity [to be a diversity champion]. You have to be able to promote it in the organisation in an appropriate way.’

The interviews also explored perspectives on the different possible ways to involve non-management employees in equality and diversity policy. There was general agreement about the necessity to involve non-management employees and a variety of mechanisms were suggested depending on the circumstances of the organisation. Interviewees felt that trade unions should be consulted and involved where present:

‘The trade unions have always had a history of being at the forefront of equal opportunities, in terms of gender, for example, but also with minority ethnic groups, with disabilities, with gay and lesbians.’

The above quote suggests that unions might be a resource for some organisations to draw upon in policy-making. Another interviewee, formerly a trade union activist, stated that while she felt that trade unions could make a difference in some organisations, this would only happen in practice where the union thinks beyond simply wage issues. She continued that in her experience it was not always the case that unionized organisations are better at ‘doing equality and diversity’ than non-union ones. Generally, interviewees felt that involving non-management employees was part of a ‘grassroots’ approach to diversity management. It was felt that organisations need to develop sensitive and effective procedures to underpin the statements about valuing diversity. There was an

implicit or explicitly stated perception that these are often absent in organisations meaning that employees have little confidence in the equality and diversity policy.

To increase non-management employee involvement a number of policy tools were suggested including ‘employee perception surveys’, focus groups of employees, employee networks. The interviewees emphasised employees as an important source of qualitative data on whether or not the policy is working. It was also felt important to cut any data gathered by gender and ethnicity in order to discover what ‘minority’ groups feel. The following quote relates one example of the value of involving employees:

‘One example – a very large management consultancy. It was only through doing really quite detailed focus groups that we discovered that women were given assignments in certain industrial sectors, but that the sector that was seen as critical if you wanted to become a managing partner, they weren’t getting assignments in.’

Communication and involvement were certainly seen as critical, but there was some questioning of what happens once the consultant has left the organisation or once the advice has been given, etc. Being on the outside of organisations meant that this group of interviewees were left guessing what might be the longer term impact of any recommendations they might make.

7 Summary Themes

This report has investigated diversity management from the perspective of three groups of people professionally involved in the area – organisational specialists and champions; trade union equality officers; other equality and diversity professionals. There is little recent research focusing on this group of key actors in diversity management, despite the fact that they are all critical to policy developments within organisations. The aim was to explore organisational policy approaches, initiatives and processes from their perspectives. The conclusion summarises these perspectives and then offers some final comments on the findings of the study.

7.1 Organisational diversity specialists and champions

This group of professionals were generally very positive about the shift from equal opportunities to diversity management. They mostly believed that an integration of the social justice case (more typically associated with equal opportunities) and the business case (the emphasis of diversity management) is possible in policy terms. Furthermore, the broadening of the agenda to include more individual differences was seen as advantageous. However, the overwhelming majority saw the business case as a positive development and one that would win over more line- and senior managers to pro-diversity arguments. There was some mild criticism of diversity and its potential dangers, including losing focus on discrimination and disadvantage as policy priorities.

Despite these views about the policy approach, when interviewees were asked to talk about their organisations' policy initiatives in practice, the examples provided were generally geared towards addressing discrimination and under-representation, particularly on grounds of gender and race/ethnicity. Thus there was a continuation of more traditional equal opportunities practices. There was however some limited broadening of the agenda indicated by the interviewees' prioritising of work-life-balance and flexible working as diversity issues and their view of the need for organisations to recognise the intersecting and multiple nature of identity.

Furthermore, there were indications of aspirations of changes related to policy implementation. Most interviewees thought that equality and diversity issues should be moved out of the HR department. However, while a couple of organisations had responsibility for diversity held outside of the HR department, this clearly remained an aspiration rather than a reality for most. In addition, there were also aspirations that policies needed to focus on changing cultures and attitudes rather than only addressing discrimination. However while this was a common aspiration, very few organisations seemed to have introduced practices that actually attempted to address this kind of culture change.

With regard to stakeholder involvement, all the interviewees believed that the most senior level of management in their organisations was committed to equality and diversity and they all considered it important to involve non-management employees in policy-making. However, their organisations differed in the approach to employee participation and involvement, with a minority of interviewees actively committing themselves and organisational resources to involving the recognised trade unions. In others trade unions played only a marginal role, even though there appeared to be no in principle opposition to union involvement. In all of the organisations a variety of direct forms of employee involvement had been tried including surveys, focus groups, employee network groups. However, despite the majority viewing the involvement of non-management employees as important, only a very small group of organisations appeared to have the kind of integrated, supported and multi-channel forms of employee involvement that could potentially lead to significant input by non management employees. The biggest challenge for the specialists and champions was seen as how to engage line-managers and achieve the 'buy-in' of this critical group and initiatives in this area included managerial diversity performance objectives, the appointment of diversity champions, establishing diversity councils.

7.2 Trade union equality officers

The trade union equality officers were generally sceptical about diversity management. They believed that organisations should concentrate their efforts on discrimination and

under-representation of ‘minority’ groups (as per the ideas of traditional equal opportunities). However, there was some qualified support for the ideas contained within diversity management. They particularly welcomed the broadening of the agenda to include dimensions of diversity other than gender and race/ethnicity and they too talked about the importance of recognising people’s multiple identities. Another concern was the equality implications of the spread of individualised HR techniques, such as performance appraisal and performance pay, where they had identified discriminatory effects.

While the trade union equality officers did not doubt the senior level commitment to equality and diversity in many organisations, they were concerned that the business case did not seem to have won over line-managers. There was concern that any abandonment of the more procedural approach to equal policy might diminish line-management accountability and thereby increase the possibility of discriminatory outcomes occurring. The importance of non-management employee involvement was emphasised and equality and diversity were firmly positioned as collective issues.

7.3 Other equality and diversity professionals

This group of interviewees was more circumspect than the organisational specialists/champions about the potential for diversity management to be the best way forward. However, like both the specialists/champions and trade union equality officers, they welcomed the broadening of the traditional equality agenda. They pointed to a gap between the rhetoric of many organisations’ policies and the realities of practice. There was also a strong view that standard ‘solutions’ or policy prescriptions do not always prove suitable or successful within all organisations and that it was necessary to identify the ‘problems’ and issues within individual organisations and then to develop concrete initiatives appropriate to the culture and context. Like the trade union equality officers, this group of interviewees was also concerned about the possibility for individualised HR techniques to give rise to discriminatory effects. Again, it was perceived as necessary to involve line-managers, but this was also one of the greatest difficulties they had experienced in their roles.

7.4 Final comments

It should be noted that the private and public sector employers involved in this study include some organisations that are considered to be at the forefront of developing equality and diversity policy. All the organisations have shown considerable commitment to developing policy initiatives and as the trade union equality officers reminded us, there are many other British organisations that lag far behind those represented in this study. Therefore, although the equality and diversity policy orientations and efforts described in this report could be taken to represent the state of ‘good practice’, the picture is by no means representative of all British employers.

The interviewees who stood outside of mainstream organisations – the trade union equality officers and the group of ‘other’ professionals – were the most critical of the shift from equal opportunities to diversity management. This is unsurprising as equality and diversity specialists in particular are bound to be less critical because they are to a large extent formally accountable for the policy (depending on their seniority) and a policy failure might be interpreted as their personal failure. Also, many of the specialists/champions in the study have considerable operational management experience and firmly believe that the business case offers an opportunity not only to pursue equality goals, but also to achieve business ones.

All those professionally involved in diversity management agreed that how to achieve line-management ‘buy-in’ is now the greatest challenge facing organisations. This is indicative of an acceptance, to one extent or another, by all the groups of interviewees that the procedural compliance approach associated with traditional equal opportunities has its limitations when it comes to accomplishing the kind of organisational transformation that is necessary for equality and the valuing of diversity. The challenge is to get managers to actually believe in the positive messages contained within diversity management about the benefits of a diverse workforce. It was recognised by all three groups of interviewees that line-managers have different interests compared to non-management employees since they are formally accountable for meeting operational objectives and anything they perceive as standing in the way of that is bound to be

negatively received. It was also agreed that it is fruitless to simply blame or vilify line-managers and that there had to be some confronting of the multiplicity of reasons why they might be resistant to equality and diversity initiatives.

The three groups of interviewees also all agreed that for equality and diversity policy to be successful it was necessary to involve and communicate with non-management employees. There were different views on how best to achieve this, but in many of the unionised organisations it was clear that there was a 'voice' role for the trade unions that could serve multiple purposes that did not necessarily work against organisational interests. Therefore there was some potential for a partnership approach on equality and diversity. However despite views of the importance of involving non management employees, the involvement mechanisms in place in the majority of organisations were still fairly limited and often only superficial. The need to generate buy-in of a variety of internal stakeholders is clearly a challenge that organisations and their diversity specialists and champions still need to address.

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