

3 Equal Opportunities, Business Efficiency and Training

In this chapter we look at the factors influencing the decision of organisations to arrange equal opportunities training, and the relationship between the training and other organisational features and policies.

Different organisations, different approaches

We discussed race relations and equal opportunities training with people working in a very wide range of organisations. What they have in common is their use of some type of course, workshop, briefing session or extended consultancy in order to initiate, facilitate or extend their performance in terms of race equality. Some are private companies while others are in the public sector, and others are charitable bodies; some are large employers with tens of thousands of staff, while others have fewer than twenty; some have well-established arrangements for staff training in other areas of job performance, while others have given little thought to training matters; and some have long histories of interest in equality issues while others are new to the area. Not surprisingly, we found among these different organisations a considerable variety of approaches to equal opportunity training.

An axiom repeated often by trainers and by commentators is that race relations training only makes sense as part of an overall equal opportunities or anti-discrimination programme. In fact the take-up of training without such a programme seems to be rare: in most of the organisations we visited the training has emerged from a general management effort against discrimination, beginning with an equal opportunities policy of some sort. Between organisations there is a great variation in the content of those policies, in the extent of the programmes of action designed to carry them through, and in the motives and initiatives that generated them, but few employers have

adopted race relations training without accompanying policies about change. The formal decision to take up training usually comes down from a high level – from executives, board members or elected councillors – but is often filtered through the deliberations of working parties, special staff units devoted to equal opportunities, or individual specialists.

Justice and efficiency

The impetus for change over equal opportunities can come from two different and identifiable directions. One is the moral and political argument about an organisation's responsibility to be fair and to play its part in creating a society free of discrimination and inequality based on race and sex – an argument backed up by the general spirit of the anti-discrimination legislation. The other argument centres on the inefficiency of discrimination and the costs of barring the development of potential within the workforce – particularly now that the supply of young job recruits is beginning to tail off. The 'business sense' argument is also backed by a consideration of the legislation, because employers wish to avoid the inconvenience, bad publicity and costs associated with industrial tribunal cases and CRE formal investigations. Depending on the organisation, one or both of the 'moral' and 'business sense' arguments are deployed to convince decision-makers to adopt the policy; these arguments appear again in the substantive content of training.

It is helpful to remember this dichotomy between justice-oriented approaches and efficiency-oriented approaches. Although bodies and individuals promoting equal opportunities measures tend to use both arguments together to sell the notions of policy change and training, and organisations rarely explain the origins of their own policies purely in terms of one or the other, the approaches are logically distinct. The justice-based arguments would still be valid even if there were no extra benefits in terms of efficiency. In practice, it is clear that some organisations have started from a formal political commitment while others have been strongly influenced by fears of recruitment shortages and doubts about their success in selling to ethnic minority markets. Public sector employers and charitable organisations tend to start from the justice arguments, while private firms tend to cite business reasons for their equal opportunities efforts. In a number of the firms we visited, however, it was the principled

commitment of senior staff or board members that started things and kept up the momentum.

The council came to power with a long equal opportunities manifesto.
(Local authority training section)

We were on the hook with the EOC. There was a complaint about our recruitment practices.
(Large commercial company)

The current impetus for equal opportunities is the need to respond to the diminishing numbers of young people entering the labour market. We therefore faced pressing business reasons for enhancing the focus on equal opportunities.
(Large electrical goods manufacturer and supplier)

The organisation has a written equal opportunities policy which was produced in 1985. The policy was introduced mainly because of the commitment of a new chief executive.
(Charity with 1,000 staff)

We've had a policy since 1965. It was paternalistic to begin with, coming from the moral views of the man at the top.
(Retailing company)

Demand in the public and charitable sectors

It is clear from our interviews with trainers that up to now the majority of paying customers have been in the public sector and the voluntary sector. It is in these sectors that equal opportunities policies have been adopted most frequently and with most vigour on the part of top decision makers. The public sector continues to absorb the attention of many independent trainers, but some commented that with recent changes in local government finance the heyday of public sector training may have passed.

Although many of the public sector bodies that have adopted equal opportunities training are large employers – local authorities and health authorities in particular – there is also a substantial number of smaller public organisations involved, with employees in the hundreds rather than the thousands. In the charitable sector the organisations involved are small, reflecting the general profile of these bodies.

Demand in the private sector

Most of the private-sector firms with a strong equality effort are well known and our research has not extended the list a great deal. A number of large employers with a history of equal opportunities

considerations in their employment practices have been joined more recently by others, principally in the financial sector and in the media. Our impression is that the impetus for training on race in the finance sector often comes from a general movement on equal opportunities owing its genesis to concerns over the employment of women; in turn, those concerns have been boosted by an anticipation of the demographic changes which are reducing the pool of potential recruits. Certainly the finance sector has now joined local authorities as one of the sectors where equal opportunities training is relatively common.

Although the visits to companies with race relations training gave us a view of changes in organisations known to have taken equal opportunities measures, they provided little information about what was happening elsewhere. A small survey was therefore conducted by telephone to give some indications of the mood among a more general sample of larger private sector employers. In summary, we can say that the survey revealed very little specific training on race relations, but there seems to be a fairly widespread recognition that good personnel and recruitment practices require a training input and that equal opportunities issues should be one component of it. (See Appendix I for details of the telephone survey of employers.)

The firms in the telephone survey can be divided into several groups, each with a different view of this subject. First, there is a handful of employers where some specific consideration has been given to race and sex equality issues and some training has been arranged around them. Then there is a much larger group, accounting for the majority of firms, which recognise the need for staff to receive some kind of training in recruitment and selection procedures or general personnel management, and make various arrangements to meet that need. Within that group there is a substantial minority (about two fifths of them) who regard race relations or equal opportunities as a component of that general training, although inspection of their detailed replies suggests that most are making an assumption that any training on employment law, recruitment procedures or good employer practices by definition covers equal opportunities. The last group of firms, around one in ten, have no training arrangements in the recruitment or personnel area and see no need for them.

Over a third of all the firms in the sample have some written commitment to equal opportunities (but often a very brief one) and

they tend to be the ones claiming to have training in the area. About a quarter of informants from firms without any equality element to their training said that they do have a need for training in this area. Most of those saying that their company has no need for race relations or equal opportunities training regard their current procedures as non-discriminatory and do not see the issue as a problem.

In the private sector the existence of equal opportunities policies and equal opportunities training seems to be strongly related to the size of firms. Nearly all of the companies we visited to discuss their equal opportunities training were found to have over a thousand employees, and the majority employed many thousands. The results of the telephone survey reinforced this picture: written equal opportunity policies existed in over half of the firms with 1,000 or more employees, and in nearly two-thirds of firms with ten or more establishments; by contrast, only 16 per cent of single-site firms had written policies.

Why do organisations seek equal opportunities training?

What do organisations want from race relations and equal opportunities training? Often their aims and objectives are initially unclear, although the demand for training seems to them to be a natural part of organisational change. Indeed some organisations regard training as the first and main element of their programmes. Once they enter a phase of concerted internal discussion, or consultancy with an outside trainer, training aims and objectives tend to become clearer, although this is not always the case.

Our research indicates that, in simple terms, organisations are seeking one or more of the following results from race relations training:

- to get things moving;
- to give a signal that things are moving, particularly to those who are able to put pressure on decision-makers;
- to develop an equality strategy;
- to win over key staff from indifference or opposition to the policy and then persuade and enable them push it forward themselves;
- to deliver technical advice, information and skills that in themselves help the equal opportunities effort of the organisation.

Training to get things moving

For managers, discussions about equal opportunities can seem to lack practical substance, and they have difficulty finding a point at which to initiate action. Training is tangible, and is something of which they have some experience. In some organisations, despite their paper policies, absolutely nothing happens until they begin to think about training. The same effect can be sought in specific parts of an organisation – we heard about training being directed to areas where particular local managers were dragging their feet.

When the organisation was started in 1980 it was required by its funders to have an EO statement. This was short and vague and nobody thought about EO as a priority in their work. In 1985-6 members of the collective and management committee members went on a racism awareness course... In 1986-7 the EO sub-group was formed and this met every month to work on a collection of policies.
(Small Voluntary Organisation)

Training to give a signal that things are moving

Training is something visible to staff, executives, board members, council members, and customers. So in terms of employee and public relations, training can be seen as an important symbolic first step.

Training was not strictly mandatory, but you would not be allowed to interview without training. The members wanted to demonstrate that they were serious about the policy.
(Local authority)

Training to develop an equality strategy

This is a specific objective that some organisations use trainers to help them pursue. A typical format would be one or a series of information sessions and workshops for senior staff or policy makers during which the race relations or equal opportunities policy and programme is planned, examined or built up.

We felt the course should be seen as part of organisation development... The course was also concerned with clarifying the organisation's position with regard to the racial dimension of the service we provide.
(Voluntary organisation)

Training to win over key staff

The idea behind this kind of training is that spreading responsibility for the policy down through the organisation should make it self-sustaining. 'Key staff' here means different things in different organisations: in some cases it extends only as far as senior personnel managers, while in others line-managers throughout the organisation are included.

All managers involved with recruitment were trained nationwide, and all people involved in personnel... The aim is to get everyone conversant with their responsibilities and to get branch managers to see equal opportunities as part of their business objectives.
(Large financial company)

Training to deliver technical advice, information and skills

Examples are an understanding of the race relations legislation and standardised fair interviewing techniques for recruitment and selection.

The people being trained are those who interview on the milk-round and others... The whole thrust of recruitment and selection programmes is that they should be free from recruiter bias and interviewee reaction...
(Minerals company)

Who takes the decisions?

In most organisations, irrespective of sector, the decision to adopt training as part of the equal opportunities effort is taken along with the decisions on overall moves on equality – in other words, equal opportunities training usually owes its existence to its inclusion in the original package of measures. Usually the overall equal opportunities policy is established at a high level of an organisation; it could be said, therefore, that the decisions over equal opportunities training are taken at the level of senior management, board or council. However, the real practical choices about training are mostly taken at lower levels, for two reasons. First, the high-level decisions tend to be based on plans proposed by others, such as personnel and human resources managers, departmental management, special working parties or outside consultants; and, secondly, the high-level sanctioning of equal opportunities training tends to be a simple agreement in principle, leaving the more detailed decisions about the type of training and the trainers to more junior managers.

In the private sector, the equal opportunities training is usually organised by a manager in the training or personnel department. Some firms, however, have appointed an equal opportunities manager, who is often then given responsibility for training in this area. Because of the tie-up between equal opportunities issues and personnel management, there is a need for close collaboration between managers on the training side and those working in personnel; in the organisations we visited, there seem to be good working relationships between the different areas of responsibility, at least as far as equal opportunities training is concerned. The arrangements are simpler in companies where general training is centralised; in companies where the training responsibilities are partly devolved to departments, to geographical regions or to profit centres, the equal opportunities training tends to be centrally encouraged and organised, but the progress can be uneven and in some cases the component organisations make their own arrangements. Some very large firms have a training section that effectively sells training to other divisions (or other companies within a group), and the spread of equal opportunities training relies heavily on encouragement at board level.

General managerial and personnel arrangements also vary between companies with different levels of centralisation and corporate control, although the implications for equal opportunities efforts in each case are difficult to predict. In some companies the unchallengeable, centrally-issued instruction to subsidiaries or branches is a powerful tool, and once a particular practical component of the equal opportunities programme is agreed at the centre it can be implemented rapidly. In our discussions with employers we found large companies where progress on equality relied partly on this procedure, to great effect. But bureaucratic control of managerial and personnel practice can also slow things down, and in other centralised firms we found frustration resulting from the inertia of an organisation that seemed too big to change at any speed. Similarly, in the large groups with decision-making power devolved to individual businesses there is no straightforward implication for equal opportunities: within each component businesses a good equality programme has more scope to influence mainstream managerial practices and structure, but those businesses are also free to ignore the issue altogether. We found uneven progress within these decentralised groups, both on equal opportunities generally and on race-related training in particular, with

good headway made in some organisations but none in others in the same group. Some groups make an effort to give central guidance on equal opportunities as part of corporate culture, producing training materials and employing equality officers at head office, but there does seem to be a real difference of style and impact between the issuing of instructions to component businesses and simply making facilities available to use they want them. Unless equality of opportunity is made a corporate objective, it is easily overshadowed at a local level in the struggle to meet the main business objectives, because it is seen as something that has a local cost but no short-term local benefit. If its benefit is felt largely in the long-term, then it needs to be promoted as part of group strategy, and is therefore best encouraged from the centre as a business objective in its own right.

In local authorities the situation is parallel to that in the private sector, in that the responsibility is spread between managers in personnel, general training and equal opportunities, although managers and units with special responsibility for equal opportunities are more common in this sector. High-level decisions about equal opportunities tend to have a more detailed content than in the private sector – race relations is the subject of manifesto commitments and local politics, and members sitting on council committees exercise a considerable degree of direct control over the substance of policy. Also, the implementation of policy in this area is a much more public affair than it is in the private sector; decisions to adopt one programme of training or another can come under the scrutiny of electors, pressure groups and the media.

In the charitable and voluntary sector the decisions over equal opportunities matters, including training, tend to be taken at directorial or management council level, but also involve consultation and negotiation with other staff members and staff groups. There is a size effect here, because smaller organisations do not have so many layers of decision-making as larger ones, but there is also a difference in style of operation: charitable and voluntary bodies often aspire to a democratic and participative management style, hence the apparently greater degree of staff and member consultation. Nevertheless, in some large charitable organisations the practical decisions about training are mainly in the hands of personnel and training managers.

The importance of general training arrangements

Nearly all of the organisations with equal opportunities training had substantial programmes of general training for their staff. Most of the organisations are large and have their own central or departmental training sections; in the smaller organisations there are less elaborate training structures, but they do tend to have explicit staff training strategies with ear-marked budgets.

Organisations utilise their existing training arrangements to introduce race relations and equal opportunities training to varying degrees. Some integrate the new training into courses already running, by adding equal opportunities sessions. Others set up new courses within the existing training framework, or replace old courses. In all cases, however, it appears that the existence of a ready-made structure plays an important part in facilitating the introduction of equality work. We have to conclude that organisations with little or no training in management and personnel matters are unlikely to develop any equal opportunities training; in support of this, the results of the telephone survey show that none of the firms without training arrangements for personnel matters claimed to have arranged any equal opportunities training. This is related to the tendency of training to be the first concrete measure in an equal opportunities programme: if an organisation has a training infrastructure, and staff are accustomed to the idea of innovation and career development through training, then training is likely to be seen as a powerful tool, ready to hand, for implementing equality policies. Other measures, such as changes of mainstream employment or customer relations policies, ethnic record keeping and monitoring, targeting or positive action, require new structures and new thinking.

Organisational change and individual duties

One of the more sterile debates about training has concerned the relative merits of pursuing equality through changes in individual attitudes, through changes in individual behaviour, and through shifts in organisational policy and practice. Our visits to employers showed that under the banner of race relations and equal opportunities training people seek in different circumstances to do one or both of the following: to facilitate policy change for overall improvement in an organisation's equality performance or to equip individual staff to do their jobs better, to the same end. The best choice seems to depend on

the type of organisation and the stage of development of its equality effort, and not on an across-the-board judgement of the 'correct' way to do race training. The formal aspects of the organisation's functioning needs to be considered – for example, a public service and a manufacturing plant require different approaches to equal opportunities – and there is a need for a sensitive appreciation of the organisational culture, which can at one and the same time be an impediment to progress and a necessary starting point for change.

As described earlier, training as an input to organisational change often involves courses and workshops for decision makers at a fairly high level – sometimes senior staff, and sometimes members of boards or councils. The overall functioning of the organisation and the equality implications of policy are on the agenda in these sessions. It is notable that among the organisations we visited, the voluntary and charitable bodies have more commonly than others started with training aimed at substantial organisational overhaul, possibly because they are usually relatively small, and possibly because their moves towards equal opportunity programmes are often based on political pressure or moral questioning and therefore tend to be more searching from their inception.

The natural history of equal opportunities training within an organisation tends to run from the general to the specific, and from the top downwards: that is to say initial training efforts concern awareness or general concepts of equal opportunity, and concentrate on senior staff or middle-grade staff, while later on training concerns more practical issues such as recruitment and selection, provided for staff at lower levels. This is only a general trend, with notable exceptions, and it is true of large organisations more often than of small ones; it is also mixed up with the wider history of race training in this country, which has over the last ten years moved into and out of a phase of emphasis on 'awareness', and towards an emphasis on the functioning of the organisation. In the local authority sector this has been characterised by the change in course titles from 'racism awareness training' to 'anti-racism training'.

In all sectors the training arranged for individual staff members comprises a mixture of duty-oriented and discretion-oriented content, the balance between the two often depending on the nature of the organisation and the nature of the job in question. Duty-oriented elements involve explanations of rules, legal obligations and formal

Training for equality

duties. Discretion-oriented elements involve attempts to dispel misinformed beliefs and encourage a better understanding of the ways in which racism and discrimination seep into the performance of a job. Jobs differ in the extent to which they are governed by formal rules and by personal judgement, and it is unrealistic to expect improvements in their equality performance to be accessible with a uniform approach.