

Inclusion and Monitoring in the Union – A members guide

Introduction

This document is designed to help members to deal effectively with areas of discrimination or oppression relating to issues such as race, gender, sexual orientation, disability or a combination of these or other improper grounds. These could include age, class, nationality, faith or religious belief, size, work role, ethnicity or culture.

Although Napo will not tolerate oppressive language, behaviour or structures, it needs an enabling mechanism to ensure learning and development as well as ensuring all members have the opportunity to participate fully and equally within the Union. To date that mechanism has been referred to as monitoring.

The 2001 AGM in Eastbourne passed the following motion

“This AGM is concerned that Napo’s monitoring process has become inconsistent and unaccountable. It calls upon Napo’s National Officers to undertake an evaluation of the monitoring process and to report back to the NEC within six months”

That review occurred and the “Report on AGM motion Review of monitoring “ (ERIM35-02) was approved by the NEC in September 2002. The document contained a number of recommendations, which included redrafting the Monitoring Guidelines (March 2000) to reflect current practice and to review the training pack on monitoring which was developed some years ago.

This document is the result of this process and was developed by members of Equal Rights Committee and one of Napo’s national officers. Members will note that some of the language may have changed slightly but Napo’s commitment to the monitoring of the Union’s business is enshrined in the Constitution, which states

“A formal monitoring process shall apply to all General Meetings, Committee meetings, Sub-Committee meetings and Branches and their committees” (Para 6b, Conduct of Meetings).

1. Why Monitor the business of the Union?

Discrimination and oppression, both personal and structural, continue to occur throughout society and are manifested in overt, covert, passive or active forms. Napo believes that the monitoring of its business is a mechanism which can engender a positive climate in which all members feel as safe as possible. It is a way of increasing awareness and learning for all members as well promoting change within the organisation. The fundamental purpose of monitoring is to make Napo a more inclusive union and to enable members to participate within their union as fully as they wish. It also provides a focus for dealing with issues relating to language, behaviour and structures when they can feel oppressive or threatening.

It is clear from reviewing the monitoring reports from NECs and other meetings that some learning points have not yet been fully absorbed given they are raised repeatedly in feedback. Specific examples of this are the need to keep background noise to a minimum and for speakers to introduce themselves before contributing. Members with a hearing impairment may be affected in the former situation and the latter may affect those with a visual impairment. This would lead to members being disadvantaged and not able to participate fully in their union. In these scenarios, it is the monitoring process which enables these learning points to be reiterated.

The Monitoring of union business is always the responsibility of all members and not just a nominated individual, it should be constructive and not destructive but can be a challenging process.

2. History and changing style

Napo began monitoring its AGM in 1987, and in its initial years the style of monitoring was felt to be very confrontational in nature, with members who had been monitored making public apologies before the whole of Conference. Over the years, the monitoring process, especially in formal meetings such as AGM and NEC has become more sophisticated with the aim of moving it from a reactive and sometimes critical mechanism to a more proactive, enabling and learning process, which is designed to promote good equal rights practice and inclusion.

3. The focus of monitoring the business of the Union (or Key Principles)

Napo is wholly committed to being a fully inclusive union and believes that there should be a mechanism to:

1. Ensure that as a organisation we should challenge discrimination, oppression and exclusion when it occurs within the union.
2. create an environment where all members feel able to participate in union to the extent that they so wish.
3. create a learning environment which is not afraid to challenge but does so in a manner which is not destructive in itself.
4. ensure that all its policies, as well as their implementation and impact, fully take into account equal rights issues and reflect the diversity of our membership.

One of the mechanisms for this is the monitoring of all of Napo's business. The way this occurs can vary according to the size and type of meeting, for example the monitoring of AGM business is likely to occur in a very different manner to that of a small working group of three or four people. This document goes on to outline how some of the monitoring of the union's business should occur in the formalised environment of AGM and NECs, plus it also gives guidance to other meetings. However the key focus of the monitoring of Union business should be the same whatever the size, level of formality or nature of an event:

1. the monitoring of union business is a process of enabling, mediation, negotiation and, if required, constructive challenge, rather than confrontation and destructive processes.
2. It is an evolving process.
3. It provides a mechanism to raise issues in a de-personalised way and makes them the responsibility of the union as a whole.
4. It can engender a positive climate in which all members feel as safe and as welcome as possible and are encouraged to participate as fully as they wish in all union business.
5. It can provide contact points/people for those who feel discriminated against or oppressed.
6. It provides facilitators though not experts. It is a learning experience for all of those who become involved.
7. It should be accountable to both members and to the union as a whole. At a local/regional level this should be via the branch executive, CAF/CASS SEC, or branch/section officers. Nationally via national committees, Officers and Officials and the NEC.
8. The Chair of the meeting, if appropriate, can intervene in discussion if the language or behaviour of the meeting is oppressive or discriminatory.

The monitoring of union business is not about:

1. the “thought police”
2. stopping lively and controversial debate. People just need to consider the impact of their language and behaviour on others.
3. Acting as the conscience of the union. It is the responsibility of all of us to act in an inclusive and sensitive manner.
4. Basic logistical problems such as room temperature.

4. Monitoring of AGM Business

1. The formal monitoring is co-ordinated by two lead monitors, one of which should be the Chair of Equal Rights Implementation and Monitoring Committee (ERIMC) to ensure accountability via the NEC and is provided by Napo members.
2. Prior to the AGM, the Assistant General Secretary (Equal Rights) is responsible for ensuring that publicity goes to branches seeking volunteers in good time.
3. Those volunteers should be either members of ERIMC or members that have completed Napo’s equality training within the last five years (and undertaken monitoring training/briefings)
4. The Assistant General Secretary responsible for AGM organisation is responsible for ensuring that appropriate accommodation and facilities are made available.
5. Prior to the commencement of AGM a meeting between the lead monitors, Stewards, Officers and Officials will take place to clarify roles and responsibilities.
6. There will be monitors on duty during the whole of formal Conference business. Inexperienced monitors will always be paired with experienced monitors and will be supported by the lead monitors. The role of the monitors in the Conference hall is to identify any issues of discrimination or oppression.
7. Monitors in the discreet monitoring room are available to be approached by any member seeking advice, action or support on any equal rights issues arising out of conference business. In addition, monitors are willing to help ensure that prepared speeches are not only free from oppressive and discriminatory content but are also inclusive in nature.
8. A written record will be maintained of all the issues brought to the attention of the monitors.
9. The vast majority of issues raised are dealt with discreetly and quickly behind the scenes. For example with the monitors liaising with the people involved to try and resolve the issues by a mediation process. In addition they liaise with the Officer’s group, Officials, Stewards and Steering Committee to address structural issues.
10. At specific points during the day the monitors meet and review the issues raised during that day and a decision is made over what to feed back to AGM. Members need to be aware that the verbal report covers certain sessions of business, and issues raised after that may be

contained in later reports. The Chair of ERIMC should be involved in deciding what goes into the daily monitors report.

11. The matters fed back to AGM are those that it has not been possible to resolve to the satisfaction of the complainant or those that are particularly serious. One of the lead monitors will give the feedback.
12. There are occasions when members have not agreed with the views or the actions of the monitors. Their differing views should be reflected in a subsequent monitors' report having been raised with either the monitors themselves or the Officer's group/Assistant General Secretary (Equal Rights). It should be made clear in the monitors' report that feedback or queries are welcome. However, it is acknowledged that it is not always possible to resolve matters to everyone's satisfaction. Members could always use the post AGM Napo News to engage in debate
13. If the report either identifies an individual or it is obvious which speech it refers to, it is good practice to ensure that the person(s) involved are aware that the comment will be made.
14. There should be a written report prepared by the monitors in conjunction with the Chair Of Equal Rights Committee. The report should summarise the issues raised at AGM, any action required and by whom. It should be presented by the March NEC. It is important that the written report is kept so that Napo can review how the process is working on a regular basis.
15. The formal process of monitoring the union's business does not remove the right of the individual member to act in an independent capacity where it is felt to be necessary or more appropriate.

5. Monitoring of NEC Business

1. The monitoring of NEC business will include all debates and documents presented to the NEC, the process of undertaking business and the conduct of the meeting.
2. Members of ERIMC will undertake it. Given the consistent absence of any issues being raised on the occasion where there was no-one identified to monitor the business of the NEC, there should always be monitors identified (with back ups if required) in advance of each meeting.
3. Individuals new to the role should be briefed on the function and style of the NEC, and if at all possible have an opportunity to "shadow" or work with experienced monitors. Care should be taken in framing the report especially if commenting on a particularly contentious debate.
4. The monitors should not have a dual role as NEC rep.
5. When Equal Rights committee is reporting to the NEC some-one else should be monitoring business.
6. The monitors shall be available to members of the NEC for advice, information or to raise concerns.
7. Monitors try and resolve issues discreetly and in an enabling manner
8. The monitors may draw the attention of the meeting to behaviour, language or process which is discriminatory if the matter is of such gravity that it requires immediate attention.

9. The monitors shall present a verbal report towards the end of the day. This report shall not include the business of the employer's session of the NEC. Any issues arising after this juncture are passed to the Officers group, who will report in writing at the subsequent NEC meeting.
10. **Employer's Session of the NEC**

In the employer's session matters relating to employees of Napo may be discussed. These matters are confidential to members of the NEC unless designated otherwise by the Chair. These sessions shall be monitored in accordance with the following process:

 - a) The monitors, or members of the NEC may bring a matter of gravity to the immediate attention of the NEC during the employer's session.
 - b) The Officers shall report verbally to the next NEC employer's session any matters that have been brought to their attention in any written report from the monitors and shall also report any action, which the Officers have taken arising from the monitors report.
 - c) The monitors shall not discuss the specific content of the employer's session of the NEC with anyone who is not a member of the NEC. Members of the Officers group shall be available to discuss issues with the monitors in between meetings of the NEC as necessary.
 - d) The Officers may discuss matters raised by the monitors, which affect the employment of staff through the Napo ACTS JNC meetings as appropriate.

6. Other Napo Conferences and Events

The organisers of conferences, events etc have a responsibility to ensure that business is monitored in line with Napo policy. It is good practice to have an identified link person.

7. Guests

It is important that when guests are invited to address Napo events and meetings that normally every effort is made to ensure that they are briefed about the expected standards of language and behaviour as well as the union's commitment to anti discriminatory practice.

8. Monitoring the Business of Branches and the CAF/CASS Section

As with all other Napo events, Branches, the CAF/CASS Section and executive committee meetings need to have a process of effectively monitoring their business. The monitoring guidelines dated March 2000

identified two possible styles – self monitoring and the nominated monitor(s) method.

During the course of the work which lead to the completion of ERIM35-02 “Report on the AGM motion Review of Monitoring” a questionnaire was sent out to branches in an attempt to establish the style and method of monitoring currently being used. This survey occurred prior to the establishment of the CAFCASS section. A total of 20 branches responded, of those which did, only 35% appointed specific individual(s) and generally the same individual/group of individuals undertook the role. Concerns were expressed that those individuals did not reflect the wide diversity in branch membership. Of those branches who did not appoint a specific monitor most had contact points, often the Chair or other branch officers. Some branches also made statements at the commencement of business about the expected standards of behaviour.

It is clear that what works in one meeting may not work in another, therefore branches/CAFCASS Section need to find a mechanism within Napo guidelines which ensures all members are able to participate and feel included as well as provide a mechanism for learning and if necessary redress.

Issues of good practice – whatever format or mechanism is used to monitor the business of the union consider including the following:

1. Meetings should be welcoming and inclusive. Thought should be given to welcoming members especially if they are new or infrequent attendees.
2. Explanations should be given to what is happening, the background to matters, do not assume everyone has as much knowledge and information as for example Branch or Section officers. Avoid jargon.
3. Ensure information is available in accessible forms, preferably in advance. Be aware if members need information in a specific form e.g. use assistive technology.
4. Avoid acting as a clique, thereby inadvertently excluding members.
5. Find a way of balancing the needs to run a meeting/adhering to standing orders and having a friendly and inclusive meeting.
6. Consider a statement at the beginning of the meeting about the need for inclusion and an expected standard of behaviour and language.
7. The Branch Executive/CAFCASS SEC to actively work with members from disadvantage groups to feel they are able to participate.

8. If identified monitors are not being used, identify a contact point for members to raise issues and concerns and ensure people know who they are.
9. Ensure there is time within the meeting for feedback of any issues raised, and that they are noted.
10. Branch Executives/CAFCASS SEC has a responsibility to ensure issues are dealt with, both individually and structurally .
11. All Branch Officers/CAFCASS SEC members should have undertaken equal rights/ diversity training.
12. Meeting agendas should cover Anti racism and Equal Rights issues.

9. An Aide Memoir to broadening inclusion

It is important that equality and diversity issues are firmly kept on the agenda both figuratively and literally. Napo nationally provides a range of training events focusing on bargaining, representation and equal rights which are contained in the Annual Training Strategy. There have also been Branch and Regional training events on a range of issues including anti racism training, representation training for black members and, some years ago, specific training events to assist people become involved in the monitoring process which were run both in some branches and as a national event. A training pack was developed to facilitate that training and assist branches to monitor their business.

The aim of that pack, part of which is now included in this Guide is to familiarise members with the principles of union business and to apply them in practice. The training is based upon small group exercises and role-plays. The only equipment needed, beside room space, is flipcharts, pens and copies of Napo's equal rights policies which are listed in Appendix One. This practical set of exercises assumes people know each other, if they do not a basic ice breaking exercise is required.

Training Exercise One

Positive reasons for monitoring business/ identifying where help is needed

Aims: This session should prepare the group for a role-play by identifying the aspects of the monitoring of union business where some assistance may be needed and to establish how issues can be progressed.

To help members feel that there is a way forward for most of the issues raised and to create a sense of empowerment.

- Method:**
- a) Small group exercise, using a flipchart in each group, make two lists:
 - i) The positives of monitoring (for members and for Napo as an organisation.
 - ii) What areas of monitoring would members of the group like to discuss further to obtain help and experience with.
 - b) Plenary group, using one flipchart:
 - i) Make a complete list of the positives, taking feedback from each group.
 - ii) Make a list of the areas which members want help – ask members if they can define the nature of the issue. Is it about:
 - a) the organisation of the event/chairing of a meeting.
 - b) Difficulties experienced in participation by members
 - c) The structure of Napo as a whole
 - d) What do I say? How do I respond to this?
 - e) Other.

Finally ask the group to think about where/how each type of Issue should be progressed; on the understanding that the monitoring of union business should be a learning experience, managed as positively as possible from everyone's point of view, and that the aim is to avoid a repetition of events.

A broad guide to locating issues would be:

Organisational	To the Chair of the meeting or to the Branch/Section Executive Committee
Participation issues	To the Chair To the Branch/Section Executive and through them to the full meeting
Structural Issues	Through the executive to the NEC or AGM
What do I say/do?	Confidence building opportunities, e.g. role play/training etc.

Training Exercise Two

The Role Play

Aim: To provide an opportunity to test out the possible responses of Identified monitors or nominated contact points, branch/section Officers and other members to issues and comments arising in A simulated branch/sub-section discussion.

Method:

- a) Whole group role play - duration approx 20 minutes
- guidance notes outlined below.
- b) Debrief for a maximum of 10 minutes to discuss:
 - i) what happened?
 - ii) What else could have happened?

Scenario:

The setting for the role play is a branch meeting/ section or subsection meeting. The group will need to identify:

- A Chair
- A secretary (as a note taker)
- Monitors or a contact point.

The meeting scheduled for two hours, has become quorate quite late and after completing formal business (minutes, elections, JNC business, etc) the meeting only has time to discuss one of the two (draft) policy documents tabled for branch/section response:

- The draft Disability policy
- The draft redundancy policy

[Branches/CAFCASS SEC could choose policies more pertinent to them. There should be one codes and conditions policy and one equal rights policy]

The Chair asks the meeting to give her/him some guidance on which draft policy document they should discuss. After a few comments it becomes clear there are those who wish to discuss the equal rights policy and those who wish to discuss the other one. Suddenly the meeting begins to have a problem.

Take 20 minutes in all to discuss the initial question and to try and resolve the issue.

Role play - Notes for Monitors or contact point

You may not necessarily need to be the ones who respond to any discriminatory or oppressive remarks. If no-one else responds you may wish to.

You may not feel that the meeting is managing ok and that you can respond at the end – in terms of organisational or structural issues.

If you feel that you should say something in the meeting you are probably right – take a risk!

Remember that if some one else in the meeting tries to intercede to prevent a situation or to redress matters, that person may feel very anxious. Give positive reinforcement if you can.

Remember that if a meeting can be prevented from making an oppressive decision, a great deal of distress is spared.

Role Play - Briefing for one or two members (codes and conditions)

You believe that the codes and condition policy must take priority over everything else, particularly as the Service/CAFCASS is facing a difficult time which will impact on members.

You believe that this is a “bread and butter” trade union issue and the equal rights policy can wait a little longer.....

Role Play - Briefing for one or two members (equal rights)

You believe the meeting must set aside the draft disability policy, given the union’s record on this area needs improving and that a union which can not prioritise support for all of its members is at risk of becoming a divided and oppressive union. You believe that the choice is about fighting for the rights and freedom of oppressed groups and that although you understand the need to discuss the codes and conditions policy you suspect this is attractive to some members as a macho trade union issue which is easier to deal with than equal rights and diversity issues.

Training Exercise Three

Positive Outcomes

Aims: To find ways in which the monitoring of union business can be Progressed to positive ends.

Method: Plenary group.
As a group, out of role, discuss the ways in which you would feedback to your branch/CAFCASS sub-branch positive responses and learning outcomes from the issues raised in the role play.

Assume that the monitoring contact person will be producing a report which will be fed back at the start of the next meeting.

Include:

- i) what were the details
- ii) were they organisational, participation, individual
- iii) what is the desired learning outcome or change
- iv) Should some of them be raised with the individuals concerned and by whom?
- v) Should some of the issues be passed to the Chair, executive, the NEC?
- vi) As well as the substantive issues from the role play, what other issues may need raising i.e. what was absent?
- vii) What positive feedback can the report include?

And finally allow members to reflect on the training and issues for development.

Abbreviations

ACTS	Napo Staff Union (Transport and General Workers Union ACTS Trade Group)
AGM	Annual General Meeting
ARO	Anti Racism Officer
CAFCASS	Children and Family Court Advisory and Support Service
ERIMC	Equal Rights Implementation and Monitoring Committee
ERO	Equal Rights Officer
JNC	Joint Negotiating Committee
NEC	National Executive Committee
SEC	Section Executive Committee (of CAFCASS Section)

Appendix One

Napo's Equal Rights Policies

Over the years Napo has developed a number of policies on Equal Rights issues:

Anti Racism Policy and Strategy (2003)

Anti Sexism

Lesbian and Gay Rights – supported by the Lesbian, Gay, Bisexual and Transgender Action Plan

HIV

Anti Harassment and Anti Bullying

Disability Rights (in process of development)

Branches should have copies of all of these documents, if they are not available, please contact Napo Office.