



COLLECTIVE EMPLOYEE VOICE

Recommendations for
working with employee
representatives for
mutual gain

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Case studies

Collective employee voice: recommendations for working with employee representatives for mutual gain

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1 NatWest Group plc

Business sector: NatWest Group is a UK banking and financial services company incorporating a range of brands, including NatWest, Royal Bank of Scotland, Ulster Bank, Coutts, Child & Co, Drummonds, Holts Military Banking, Isle of Man Bank, Lombard, RBS International and NatWest Markets.

Size: approximately 60,000 employees in more than 800 branches across the UK and Ireland.

Context

NatWest Group has longstanding official union recognition arrangements with Unite the Union (for employees in the UK) and the Financial Services Union (FSU) (for employees in the Republic of Ireland and in some brands in Northern Ireland). The unions have a remit to consult with NatWest Group on collective issues such as pay, employee terms and conditions, working practices and policy alongside supporting individual employees with disciplinarys, grievances and general advice.

Some parts of the business (i.e. NatWest Markets) and some levels of employees (i.e. senior management) are not included in the collective agreements with Unite or the FSU, so when the organisation wants to consult with these groups (i.e. for a restructuring or entity change), they elect an employee consultative body (ECB) for the purpose. ECBs will also be set up on an ad hoc basis for specific change projects or initiatives that affect particular parts of the business or employee groups.

In addition, NatWest Group has a European Workers' Council to represent the interests of colleagues in Europe, as well as staff delegations and work councils (depending on the countries) for more local consultation.

Representatives and ways of working

When temporary ECBs are established for a specific purpose, affected employees of all levels are invited to volunteer to sit on it. The organisation has clear guidance and documentation on any election process required, how to upskill employee representatives, what it means to be part of an ECB and how to run the process. It also has training modules and information/procedure packs for managers who work with employee representatives. Managers also learn consultation skills and procedures by attending meetings and watching others.

The unions run their own training events for their representatives. For Unite, these tend to focus on general work practices, legal issues and health and safety, although they are starting to incorporate modules to support effective relationship-building. They also buddy up new representatives with experienced colleagues for support and advice.

Building relationships

John Peake, Senior Workplace Representative, Unite, asserts that how you come across on a personal level is key: *'You might have all the technical knowledge in the world, but you won't be effective if you can't build relationships.'*

The NatWest team echoes this sentiment. As Kirsty Ballentyne, People Relations Consultant, explains: *'Part of our role is to prepare senior people who are meeting with employee representatives to explain changes. The key thing I tell them is to just be honest*

and direct – they [the employee representatives] want to understand your strategy, where you're coming from, what it means for your people and how you're going to treat them. Don't hide behind fancy words; just be direct.'

NatWest Group asserts that building trust through honesty has been key to developing positive relationships. This includes admitting when they don't have the answers and making sure employee representatives understand the reasons behind responses and decisions when it's not what they want to hear.

Approaching difficult conversations

Respect and trust between parties helps to make difficult conversations constructive. Having empathy for different positions helps, as does having an effective chair who sets the tone and understands both sides. *'It helps to remember to look at it as providing information that can help us get better as an organisation,'* explains Tracey Wilson, Industrial Relations Lead.

Maintaining a friendly and professional approach is essential. John Peake emphasises the importance of not going into meetings *'with a chip on your shoulder'* or *'jumping to conclusions'*:

'There have been times when we've looked at something and gone, "You've got to be kidding me!" But if that sort of attitude comes across in a meeting, you're not going to get to know the full picture – it's just going to be "backs against the wall". And actually, going in and talking to people, because they're being open and honest, you understand why they're taking that approach even if you don't like it. It's important to wait for that full explanation and frank exchange.'

John Peake, Senior Workplace Representative, Unite

Regular meetings involving senior management

The NatWest HR/People Relations representatives have regular 'check-in' meetings with the local union representatives. These are weekly, fortnightly or monthly meetings depending on the business division/area. As Tracey comments: *'We get updates, listen to what's on their radar, what's going on, what's concerning them...It's a way of bringing us all together and making sure we're on the same page.'*

In addition, employee representatives meet with members of the senior management team/ chief executive and business leaders quarterly or biannually. These meetings focus on key initiatives they've worked on since their last meeting, any issues arising and what's coming up:

'We use this as a mechanism to get business leaders in front of employee representatives pretty regularly and they use it as an opportunity to give more advance notice of other changes (i.e. technology changes, changes to ways of working) that are coming up.'

Lynne MacColl, People Relations Consultant

Additional consultations with regard to specific change activity take place on an ad hoc basis depending on the stage in the change cycle. These also include someone from the business, usually someone at a senior level.

Support

NatWest Group supports union representatives with paid time off to undertake the responsibilities of their role (up to 20% for most representatives rising to up to 40% for senior officials who are on the TU national committee). The company also has a commitment to provide information at least seven days in advance of any meeting

regarding any changes that will affect 20 or more employees and strive to inform in advance of changes that will affect fewer than 20 employees.

Reception and benefits

While there can be tension at times, relations between NatWest Group and the employee representatives are generally positive and constructive. *'There is a lot of respect there on both sides, so we can have those challenging conversations,'* says Kirsty. *'We have built up trust.'*

'We engage little and often so there's no surprises,' adds Tracey.

Regular communication with employee representatives means potential issues are addressed before they become entrenched and difficult to deal with. Improved understanding of employee issues on the ground has also helped to contribute to the success of change initiatives through adapting plans to reduce obstacles and address concerns. For example, following employee feedback, planned branch changes in Ireland were reviewed and the timeline elongated to help embed changes.

In addition, employee representatives are able to feed back on how desired policies, such as around decision-making and managing people, are playing out in practice at the local level. This has resulted in the organisation stepping up its dialogue in certain areas to ensure its message is reaching local managers.

During the pandemic, the frequency of engagement with employee representatives increased significantly, with several meetings each week:

'We ran most of our communications and FAQs past the reps before they went out more widely. That meant they could feed in what they were hearing on the ground and the concerns of their members, and we could modify the message accordingly. If people weren't wearing masks or following guidance, or if people had concerns, we knew to step up the messaging. For example, we found out that employees had concerns if there had been a case of COVID in a branch even though we were deep cleaning in all cases. So following that feedback, we stepped up our signage and communications to say what had been done and reassure people.'

Lynne MacColl, People Relations Consultant

Employee representatives are also able to feedback potential obstacles or threats to organisations' plans so that these can be addressed:

'When we were looking at the return to office, we knew there would be some local managers who would tell employees they had to go back to the office even if they could work from home. So together we created an escalation procedure so that if this couldn't be dealt with on the ground, it could quickly be escalated to a senior manager within that business.'

John Peake, Senior Workplace Representative, Unite

The existing strong relationships between the unions and the bank's health and safety team were extremely advantageous in ensuring the wellbeing of employees during COVID:

'We've got an amazing relationship with the bank on health and safety because we engaged with them very early, we work really cooperatively together, and we've revamped all the health and safety procedures. They support us and we support them and that's really benefited our members.'

John Peake, Senior Workplace Representative, Unite

The unions help convey and support the message

Keeping the unions so well informed during the pandemic meant they were able to respond effectively to members' enquiries and concerns. As Lynne MacColl comments: *'They were able to explain the bank's reasons and direct them to further sources of information and quash things that might otherwise bubble up.'* John Peake of Unite made a similar point regarding other changes and initiatives: *'Understanding the data and practices that the bank is trying to put in helps us support the message. We can help people [employees] understand from a different angle.'*

Regular engagement with business leaders improves decision-making and support for change

'You don't know what you don't know, so business leaders could be working on a project and not even think that the trade union should be involved until something goes wrong and they're fighting a losing battle.'

John Peake, Senior Workplace Representative, Unite

Over the last few years, union representatives have become more involved in strategic change decisions at an earlier stage in the process through greater contact and regular engagement with senior managers. John Peake believes that being prepared to come forward and ask questions has really helped with this: *'Our contact with senior people in the business has changed immeasurably over the last three or four years. Recently I was concerned about some practices because of COVID and I wrote to the MD of retail banking. Within ten minutes he got back to me and said, "let's meet up and have a chat about it".'*

The People and Transformation Team have also encouraged these relationships:

'Regular engagement with senior managers means that when we do ring in big change, [union representatives] have already been brought on the journey. They understand the strategy, what's changed and where the change is coming from so there's less resistance and the focus is on implementing the change fairly.'

Kirsty Ballentyne, People Relations Consultant

For John Peake the benefits of effective forums for employee voice are obvious: *'What creates the benefits is a willingness to engage and a willingness to act on the information we give and change things when necessary. And why would you want to cut off that information and that support?'*

Lessons for employers

- Regular dialogue means no surprises for the organisation or employees.
- Be honest and direct in communications. Take people on the journey.
- Maintain a professional approach and make efforts to understand different views.
- Buddies/mentors can help employee representatives and managers develop effective relationships and communication techniques.
- Involving senior managers improves decision-making and implementation.

2 B&Q

Business sector: a DIY and home improvement retailer (a subsidiary of Kingfisher Plc).

Size: around 314 stores and 26,000 employees across the UK.

Context

B&Q operates a multi-tiered People's Forum with store-level, region-level and national forums, plus a wider Kingfisher Colleague Forum. Colleagues at each level elect members to send as representatives to the higher-level forum, with elected store reps from every store attending regional forum meetings. The National People's Forum elects three of its own reps to attend the Kingfisher Colleague Forum. To ensure buy-in from all levels of the organisation, including frontline workers and line managers, the National People's Forum includes two store reps from every region – a manager rep and a frontline workforce rep, plus a smaller group of reps from other support functions.

Representatives and ways of working

Store reps have a monthly in-store meeting with colleagues following a structured agenda and also represent their stores in a regional meeting with the region managers every four months, while the National People's Forum comes together three times a year for a two-day session at Head Office, where they have a series of meetings with various senior management representatives, including two hours with the CEO and HR Director, so they can ask questions, put forward views from the grassroots and be consulted on a range of strategic issues.

Eight weeks before national meetings, reps hold a digital YamJam session to review their hot topics and set the agenda, while between meetings reps keep in regular contact via Yammer and other digital tools, which they also use to keep an ear to the ground and gather hot topics from the store-level reps. For urgent issues, management organises a conference call to seek the feedback of the People's Forum, rather than wait for the next scheduled meeting or risk not consulting the workforce. To help feed back to their regional and store-level forums on what was discussed at the national level, the National People's Forum devises a single slide deck that reps can take back to their regions and help disseminate a consistent message across the organisation.

The forum has undergone a major transformation over the years since it was founded to reach its current form – under the previous system a new set of reps was appointed to advise on each major change programme as and when it happened, but there was no institutional memory or permanent forum to consult with. Since the changes, the board has taken a much more active interest in the forum and the CEO now attends the national forum meetings each time, bringing considerably increased credibility to the body. Whereas for the first two years they had minimal participation in some stores and colleagues were appointed uncontested, limiting the quality of reps, there is now much more interest in the body and elections are generally well contested because *'people realize what impact they can have'*. Elections are run professionally, and new reps are given training in how to carry out their roles and to make sure they know how to ask strategic questions, represent the whole business and *'present a collected view'*. The term of office for the latest round of reps has been extended from two to three years to provide more stability and opportunities to gain experience.

Reception

The aim of the People's Forum is *'to engage colleagues in B&Q's strategy and represent them in sharing ideas, influencing decision-making and working to build solutions to make B&Q the best place to work and a more successful business'*. In recent years the People's Forum has made its mark in helping involve workers in decisions around the fair allocation of bonus pay and the removal of night shifts, while raising frontline workforce concerns about the design of safety shoes available to wear and helping to prevent the introduction of a new marketing campaign that was felt to be patronising and unpopular by frontline workers.

The work of the People's Forum has led to staff reps being much better informed about strategic issues facing the business, with reps saying, *'I didn't expect to be sat grilling the CEO on organisational performance – I've learned a lot more about how the business operates.'* This knowledge and understanding is then passed on to their colleagues and helps to foster greater trust with management, as reps come to *'see the board are human, just like they are'*.

From a board-level perspective, the People's Forum is now seen as a vital strategic partner and an important priority in any decision-making, as board members now routinely ask, *'What does the People's Forum think, have they been consulted?'* The forum is a key tool in helping provide a sense-check on management decision-making and in helping to act as an official channel of internal corporate communications, explaining strategic issues the business is facing to their colleagues on the shop floor.

Benefits of the forum

At B&Q the National People's Forum and its regional and store-level divisions have played a key role throughout the pandemic in shaping the company's response. Communications between the forum and senior leaders was stepped up markedly from the beginning of the pandemic, with regular phone calls and Teams meetings between the forum and the Board, sometimes on a daily basis during the first few weeks of the pandemic.

The forum was consulted by senior leaders and influenced decision-making on key issues, including around self-isolation, sick pay, furlough, PPE and the opening and closing of stores. Reflecting on the initial decision to close B&Q stores in March 2020, CEO Graham Bell described how *'this decision was taken with the clarity of grassroots feel from the People's Forum that the hierarchy of a business does not always get'*.

When discussions were had several weeks later about re-opening stores, the forum again played a key role and workforce representatives were pleased with how seriously their input was taken, with one commenting how *'the business really engaged with our feedback around what would make our colleagues feel safe at work. This allowed us to re-open all our stores and bring most of our retail colleagues back off furlough whilst respecting and supporting those who did not feel comfortable to return at that time.'*

The forum structure also acted as a key conduit of information between senior leaders and workers on the front line, complementing other channels of internal communications. On some occasions the Board or senior management sought updates on specific questions, which the forum was able to provide thanks to its collection of feedback from colleagues in stores, for example about how people were feeling and any issues arising from store re-opening. This rapid and honest line of communication with the grassroots was greatly appreciated by senior leaders. As Andy Moat, People Director at B&Q, describes: *'to have a group of colleagues who represented everyone and could help us to understand how everyone, particularly on the front line, was feeling, was I would say one of the key factors why we were able to come through the pandemic as well as we did.'*

From the workforce perspective, meanwhile, one of the forum members said: *'I believe the regular updates and meetings made everyone feel more included and [like] one team throughout the pandemic, and having the forum be able to go back, as regular colleagues on the front line, giving direct updates from the board filled everyone with confidence in the company.'*

Adaptations

The forum structure has had to adapt to deal with the circumstances of the pandemic, becoming more agile and innovative in the process. With face-to-face meetings not possible, the organisation shifted first to conference calls and then to use of Teams meetings. This has posed challenges, and there was some debate as to whether it had impacted on the quality of discussion compared with meeting in person.

On the plus side, this shift also enabled a far greater frequency of meetings, with members from different regions of the country able to speak regularly and at short notice rather than having to plan travel across the UK to meet in person. To facilitate this transition, all National People's Forum members were issued with an iPad to allow regular communication.

Moving forward, there's a desire to move back to in-person meetings at least a few times a year, but also a recognition that the online meetings have opened up the forum to allow far more regular and short-notice discussions, a recognised benefit that the company wants to maintain. One forum member expressed the view that *'I hope the future will take a blend of the way we worked pre-pandemic and some lessons learned over the past two years rather than a return to life as it was in February 2020.'*

People Director Andy Moat similarly comments that: *'I hope we'll keep the technology which reduces travel time and allows more people to more easily get involved, and especially where we might need to convene a meeting quickly, this is a great, agile option to have. I think we need to keep a blend of in-person meetings, especially, for example, around periods of re-election when the forum colleagues themselves might be getting to know each other.'*

CEO Graham Bell adds that the lasting lesson he would take away from the pandemic is: *'getting closer to your colleagues and using the People's Forum as a trusted and reliable source of reality is something that you can never do too much of in running a business.'*

Lessons for employers

- A multi-tiered People's Forum allows representation for all levels.
- Elections are run professionally and reps are given training, meaning they know how to ask strategic questions, represent the whole business and 'present a collected view'.
- The CEO attends the national forum meetings each time, bringing considerably increased credibility.
- The People's Forum is now seen as a vital strategic partner and a key tool in helping provide a sense-check on management decision-making and in helping to act as an official channel of internal corporate communications.

3 WorldSkills UK

Business sector: education charity – partnership organisation between businesses, education and governments using international best practice in skills development to boost training standards for young people, teachers and employers.

Size: small employer with around 50 employees.

Context

With around 50 employees, WorldSkills UK is close to the bottom end of the scale of companies covered by the ICE Regulations, but they chose to establish robust information and consultation arrangements anyway as a matter of good practice. They set up their consultation body, which they call the Innovation Forum, in 2017, after the results of a staff survey suggested they could improve on their internal communications and that workforce trust in senior leadership was low. The organisation was going through a period of significant change at the time and it was felt that better workforce engagement was essential to help the organisation survive.

The purpose of the forum as originally designed was threefold:

- to improve downward communication and engagement with the workforce around the strategic change programmes the organisation was going through
- to provide a venue for the CEO to hear workforce issues *‘that might not be getting to me as CEO’*
- to allow the workforce to put forward ideas that could then be taken up by management and lead to innovation.

Representatives and ways of working

The forum has between five and seven reps at any time, elected from different teams across the business and re-elected annually – each rep is representing about ten staff. Meetings occur bi-monthly but can be scheduled sooner if particular issues arise. The meetings tend to last from one to two hours. Reps all received training from an external provider when first elected.

The forum itself is co-chaired by the CEO and an elected employee chair; both liaise regularly and have joint input into agenda-setting. Each meeting will have a presentation of key issues from the CEO, time to discuss hot topics that the workforce is keen to raise – such as problems with the hot-desking system or mental health support – and then time to go through an assessment of all ideas put forward for innovation. The Innovation Forum then either approves ideas directly or submits them to the Operational Management Team for review. Currently, about three-quarters of the time is spent discussing staff ideas and one-quarter discussing management’s priorities around strategic change.

After meetings, the CEO feeds back from the meetings to the rest of the Senior Leadership Team and the workforce reps do the same with the workforce. During the Monday morning all-staff briefings, the CEO will also address the whole workforce directly, but Innovation Forum reps also will often present updates at these meetings. There are also drop-in sessions held for people keen to talk about HR, well-being or other issues.

Reception

Views of the forum from both management and workforce perspectives have been extremely positive, saying *'people have got really engaged in it – it's been great'*. Trust levels in leaders are *'now at the highest people can remember'*, increasing from 30% in the 2017 staff survey to 86% in the 2019 survey, and there is a lot more positivity around the integration of the Senior Leadership Team with the rest of the workforce – *'it felt like a them and us for some people; it doesn't feel like that anymore.'* Meanwhile, the proportion of staff with a highly positive view about senior management's communication of the organisation's ambition increased from 30% in 2017 to 83% in 2019 after the work of the Innovation Forum to improve communication with the workforce. There was a clear view that *'staff value having a voice where they may have felt they had no voice before'* and a sense that the majority of staff ideas put forward were being actively taken up by management.

The CEO is particularly keen to stress that he saw the forum as a valuable *'strategic tool for the organisation'* – deserving of proper investment of time and energy and not just *'an HR or regulatory compliance tick-box issue where you're going through the motions'*.

Evolution to Staff Council

As WorldSkills reacted to the pandemic, the Innovation Forum that had been set up in 2017 was seen as an important tool to help the organisation engage with staff and carry out rapid adaptations necessary for COVID response.

At the same time, however, it quickly became apparent that the previous format, of a focus on developing long-term innovations through staff ideas, was insufficient to deal with the fast-evolving nature of the crisis, where change management was much more rapid, comprehensive and driven by changing circumstances. As a result, over the early months of the pandemic response, the Innovation Forum was reworked into a more wide-ranging Staff Council.

This transformation was aided by a new Chair of the Staff Council, who was much more proactive in driving this change. In the words of Chief Executive Neil Bentley-Gockmann, the effects of the crisis meant that the new Chair *'was getting much more traction in the organisation as a whole, raising their profile. She did a lot to engage the staff reps and get them to understand their responsibilities.'*

While the organisation did not need to use the furlough scheme, it did have to make redundancies due to organisation restructures required to meet the evolving nature of delivery, and there was a large-scale shift to remote working that had to be managed. As Bentley-Gockmann describes, *'sensitivities were heightened but we were able to use the council as a touchstone, and get information we weren't necessarily getting through management'*.

As part of the organisation's assessment as to how long term this remote working shift should be, they carried out a special survey of the workforce, working with the Staff Council to devise the right questions.

The Staff Council in its new format was felt to be an excellent method of both upward and downward communications, including acting as a platform for Neil to speak at when delivering strategic messages to the workforce about the ongoing changes, clarifying things and helping prevent unfounded rumours from spreading amid the crisis.

Increasingly, as the revamped forum became more prominent in the organisation's COVID response, senior managers felt the need to check in with the Staff Council when making key decisions, both to hear feedback as well as to deliver messages to the staff reps.

Despite the small size of the organisation, the Staff Council had a vital intermediary role to play. There were fears that in meetings with their line managers, some staff felt uncomfortable raising all the issues and concerns they might have with hybrid working arrangements. It was realised that staff felt more comfortable delivering this feedback to their representatives on the Staff Council – by anonymising feedback in this way, senior leaders were able to get a more honest assessment of the situation colleagues were experiencing.

New ways of working

As with the rest of the organisation, the Staff Council had to move to fully virtual meetings during the pandemic. While formal meetings remained bi-monthly as previously with the Innovation Forum, the new Chair also began to have more frequent, informal consultations and conversations with senior leaders between these meetings. This greatly helped to improve communications and the ability of senior leaders to get regular feedback on how changes were affecting the workforce.

At the same time, the internal communications strategy of the organisation was changed to more fully incorporate the Staff Council as a key communications channel for the organisation – as well as informing decision-making, the forum now also sits more clearly within the structured communications matrix.

The content of Staff Council meetings has also evolved from what used to be seen under the old Innovation Forum. Whereas previously around three-quarters of meetings' agendas was spent on discussing staff ideas for change, during the pandemic the agenda moved much more to management-led discussions of crisis response.

Staff suggestions for other innovations dropped off somewhat – *'with COVID there were so many innovations going on, we were changing so much, that nobody had time for any more ideas'*.

Moving forward it was hoped to achieve more of a balance, reintroducing more staff ideas for change while also keeping the Staff Council as a change management tool for senior leaders.

One lesson from the pandemic was that the Staff Council actually functioned better when focused on driving change in a single co-ordinated area, rather than dividing its attention between lots of smaller, unrelated ideas. As part of this, the Staff Council will be focused on the topic of inclusion for the next few months – a change in approach that is felt to be starting to pay dividends.

A challenge that the Council did experience following the shift to remote working was how to provide support for reps in actually talking to and gathering the views of colleagues. The in-person drop-in sessions that had previously been held were no longer possible. The Staff Council Chair started to make greater use of the organisation's internal communications channels to get messages out to the workforce. More recently there have also been more structured staff-led virtual discussions around the inclusion programme.

While some reps were good at reminding colleagues during team meetings of the Staff Council's activities, others struggled to deal with this on top of everything else going on. A key lesson from the organisation was not to overburden staff representatives – in a small organisation with little spare capacity, most staff reps already had a heavy existing workload responding to the pandemic, on top of which they were carrying out their representative duties.

Summing up the changes, the Chief Executive described how the Council *'had purpose before but now has a really clear role in our internal comms structures and management structures... it's easy for everyone to see where it sits, what it's doing.'* In many ways the pandemic had helped to *'make clear its role and importance during a very difficult time. It has reconvened itself in a different way and become more meaningful to staff as a result of that experience.'*

One criticism of the old Innovation Forum had been that people used to put in ideas ahead of forum meetings, not really expecting that anything would come of it. In contrast, the Staff Council is *'now more central to decision-making'* across a lot of strategic areas, particularly around change management, *'and teams recognise that'*.

Lessons for employers

The forum's success has been attributed to several key factors:

- fair and contested elections
- clear terms of reference
- allowing people to meet and talk regularly and informally around and outside of the formal structures (this was regarded as key in building this level of trust)
- having the personal commitment from the CEO to the body.

4 Translink

Business sector: Translink is Northern Ireland's main transport provider and also provides bus and rail services to Dublin. Its mission is to 'lead the a transformation of transport in Northern Ireland: we will create the advanced public transport services and integrated networks which connect people and communities, enhance the economy and improve health and the environment'. Before COVID-19 over 80 million passenger journeys were made on Translink services each year.

Size: Translink employs approximately 4,000 employees across all parts of Northern Ireland.

Context

Translink has long-standing union recognition agreements with four unions: Unite; GMB; Transport and Salaried Staffs' Association (TSSA); and Services Industrial Professional and Technical Union (SIPTU). Collective bargaining at the company covers 15 different bargaining units. Overall, Translink estimates that 50–60% of its workforce are a member of one of these four unions.

Translink views the unions as a key strategic partner in the business. As Gordon Milligan, Deputy CEO at Translink, says: *'We want the unions and their members – our employees – to feel part of what we're doing in the company, so we take a partnership approach. We engage with them in conversations around strategy, the future of the business, the funding of the business and performance within the business.'*

Setting up a management forum

In addition, Translink established a management forum a few years ago in response to a request from professional and managerial colleagues. They wanted to hear communications directly from the organisation's leaders and managers, particularly as many of them were not union members.

Members of the management forum represent the various functions and departments across the company. Gordon explains: *'Anyone can put themselves forward with the support of their department, whether they are a union member or not. This was set up to respond to a need for sharing information. We don't want to draw people away from the unions, and we don't think the unions perceive it as a threat because we have built up trust and are open and transparent. The forum meets on a regular basis and discusses the same business and employee-related issues that we discuss with the unions, and they then share the information with their colleagues and teams.'*

Working with the unions

Translink has structures and committees in place to communicate with union representatives at all levels. The CEO meets with the external, full-time trade union officials and the senior internal representatives twice a year to discuss the organisation's strategy and performance as well as existing and anticipated challenges. The general manager of each of the business units within Translink (rail, bus and engineering) and members of their team also meet local union representatives on a regular basis, and this filters down to line managers. As Gordon explains: *'We put a lot of time and effort into communications through these committees and also through workshops to explain our strategy and plans and consult on, and negotiate, changes and terms and conditions. That's the ethos of the organisation's leadership: engage, and build trust and respect.'*

Translink strives to develop this ethos throughout the organisation so that managers have the values and skills required to consult and communicate effectively with employees and through their representatives. This starts at recruitment, through efforts to hire people who are aligned with the values of the organisation, and continues through ongoing investment in developing managers, including through graduate and manager training schemes and formal development programmes.

Translink focuses on building positive relationships with all four unions at all levels of the company, not just with internal representatives but also with external regional trade union officials. As Gordon says: *'At a senior level, we know them personally and have built up trust and respect as we've worked with each other for a long time. Line managers have also developed good relationships with local representatives as we drive an ethos of engagement throughout the organisation. We want to be proactive, engage regularly, share information and be transparent so we understand each other, and the unions can help us achieve our ambition. Of course we have our differences, but from our perspective the norm has been nothing but positivity.'*

Support in driving change

Translink's mission, to deliver a transformation in public transport in Northern Ireland, means the organisation is strongly focused on an extensive change agenda, whilst also striving for more efficient working practices (the company being funded by the Government as well as through passenger fares). The company is currently working towards an ambitious climate change agenda, which includes moving away from diesel to hydrogen- or battery-powered vehicles, as well as investment in significant capital infrastructure projects. These include the new Belfast transport hub, and investing in technology, including a new ticketing system in a move towards cashless services.

Gordon reports: *'There's a lot of change taking place – investments in our facilities, in our products, in technology. All this is bringing massive change for our employees – in their jobs and working practices. Some people can find that really difficult, so our challenge is to get them on board. We have engaged extensively with senior union colleagues at a strategic level to help them feel part of our journey. It would be much harder to achieve the substantial change we've been driving without union support.'*

Operating through the pandemic

Gordon believes that the support of the unions has been critical during the COVID-19 pandemic in helping the organisation keep public transport running, while ensuring the safety of employees and customers. Senior management engaged with the unions at a very early stage, and they in turn were very proactive, working closely with Translink managers to keep people safe. This included carrying out risk assessments for all roles, providing PPE, Perspex screens in buses, social distancing measures (including contactless payments and a 'no change' policy), as well as building up employees' confidence and pride in the role they were taking by transporting other essential workers. *'Our workforce also had to flex a lot as we adapted schedules several times through the various lockdowns to provide a reliable service whilst adapting to reduced passenger numbers and managing absenteeism,'* adds Gordon. *'Usually it takes time to work through timetable changes, but the unions were key in making sure that services continued through the pandemic.'*

The unions were also proactive in assisting Translink to launch an employee app during the pandemic to aid communications with employees. The app provides easy access to daily communications, wellbeing initiatives and information around work-related activities, including employees' schedules.

'We wanted employees to use the app and see its benefits. We engaged with the unions, so they were behind it and they helped us to roll it out. If we'd just tried to do it ourselves, we wouldn't have had the same level of interest. Through the unions' support the interest in the app has been incredible. Over 70% of our workforce use it.'

Gordon Milligan, Deputy Chief Executive

Key lessons from Translink

- Take a partnership approach with unions so they understand and feel part of the strategy.
- Establish structures and processes for communicating with union reps and employees at all levels of the organisation.
- Cultivate a company culture that values employee engagement.

5 The union view at Translink

SIPTU

Terry Donaghy has worked for Translink for around 33 years, and for 31 years has been a trade union representative for the Services Industrial Professional and Technical Union (SIPTU), which represents around 260 rail employees in Translink, Northern Ireland. The key to being an effective trade union rep in Terry's view is the ability to listen to members and have empathy with their individual issues. It's also important to listen to management. He believes strongly in a partnership approach and building trust and respect between management and the unions. During the past two years of COVID-19, the partnership working has become even stronger, with senior management and trade unions coming together with the mutual aims of keeping employees safe and protecting jobs.

Another example of the unions and management working together to the benefit of employees and the business is to resolve staffing issues during the pandemic. A staffing shortage on the railways prompted management to consider using agency staff to fill vacancies, but after representations from the unions, the decision was made to backfill posts to allow progression for existing employees. *'Management listened to us and the issue was resolved,'* says Terry. He's realistic about the ongoing challenges facing the company and therefore employment relations: *'It isn't always easy, but the ethos of partnership at the top of Translink, with very few exceptions, extends to other levels of management. But after the pandemic there can be no going back, and we aim to keep that close contact.'*

Unite

Hugh Ferrin is the Unite Branch Secretary of Metro, the Translink Belfast bus service. He says the employment relations climate is quite different now at Translink compared with the late 1980s/early 1990s when he first worked there: *'The company's much more supportive of new drivers and there's more concern for employee welfare, including mental health – it was more "them and us" back then, but the ethos is more collaborative now.'* Hugh says there will always be tensions between management and trade unions if there are cutbacks, but ultimately both parties want the company to be successful. Trade union reps themselves can also sometimes find themselves caught in the middle between the membership and management – for example, if there are high expectations for wage growth at a time of pressure on funding (Translink is a publicly funded company) and members have mandated the reps to negotiate a substantial wage rise.

In his view, trust and honesty are key qualities for a trade union representative, both in relation to representing members and developing working relations with management. *'It's important not to inflate expectations,'* Hugh says. *'I will tell my members what they need to hear, even if they don't want to hear it – and the same goes for management.'* An important aim for Unite is to try and resolve individual disputes such as grievances at an early stage, before they become part of a formal process. In Hugh's view, early and informal resolution, where appropriate and possible, is in the interests of all concerned, including the individual and the company.

GMB

The GMB has members in Metro, the bus service for Belfast, as well as in Ulsterbus, operating outside Belfast. Eamon McCullough has been a trade unionist for over 30 years and has been employed at Translink for 18 years. As a senior GMB trade union rep, Eamon spends a lot of his time on both individual and collective employment relations issues, including grievances. He believes the most important approach he brings to his role as a representative is being honest with people – both union members and management. In terms of the future, Eamon thinks it's important to learn the positive lessons from the challenges of the past couple of years. Key priorities should be even more communication with the workforce: *'We need more talk, and more inclusion; we are all part of a team and everyone needs to feel valued.'*

TSSA

Gary Kelly is Organiser for the TSSA (Transport Salaried Staffs' Association). The TSSA has Translink members across four different bargaining units in Ulster Bus and Northern Ireland Railways, including clerical, management, professional and technical staff as well as railway supervisors and bus inspectors. As Translink is a publicly owned company, Gary believes the public sector ethos translates into employment relations at the company, with *'a degree of openness and transparency'*. There's also a real willingness to talk on the part of management: *'It's positive that Translink has the role of ER manager – there could be more structure for dispute resolution and negotiating but the company is very open to discussion and resolving issues informally where possible; the company's intent is very much to work with the unions,'* says Gary. TSSA's ethos of partnership extends to working with the other recognised trade unions at Translink, where an issue affects all union members, such as lobbying government ministers to secure adequate funding for public transport operations.



CIPD

Chartered Institute of Personnel and Development
151 The Broadway London SW19 1JQ United Kingdom
T +44 (0)20 8612 6200 **F** +44 (0)20 8612 6201
E cipd@cipd.co.uk **W** cipd.co.uk

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