



Report



Big Lottery Fund

Understanding More about Big Lottery
Fund's Moving Up Projects



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Contents

Introduction **1**

 Case Study # 1 – Positive Moves in the Workplace..... 3

 Case Study # 2 – Gender Equality Works 8

 Case Study # 3 – Equality Mentoring 13

 Case Study # 4 – Equality Academy 18

 Case Study # 5 – Step Up! 23

 Case Study # 6 – Nursing Career Opportunities Project..... 28

 Case Study # 7 – Challenging Hidden Barriers in the Workplace 33

Discussion on Research Questions and Hypotheses **38**

Appendix 1: Outcome Indicator Tables **48**

Introduction

In 2013, the Big Lottery Fund funded Moving Up: an intervention to tackle workplace inequalities experienced by women, disabled people and people from BME communities in Scotland.

The Moving Up funding programme is part of the Life Transitions investment area of the Investing in Communities portfolio. Life Transitions aims to support people through times of change, such as becoming an adult, getting a job, moving past challenging times, and preventing the transition into debt. Moving Up fits within the transition into getting a job, by tackling workplace inequality. Projects funded as part of Moving Up work towards the outcome;

More people who are disadvantaged in the workplace gain opportunities to advance their career

Moving Up invested a total of over £3 million in seven projects, funded in 2013 for between 2 and 5 years. Through Moving Up, the Big Lottery Fund aimed to support projects engaging with a specific sector or group of employers; this was in response to research showing that sector-specific approaches can be effective in addressing underrepresentation¹. The Fund had a particular interest in projects where employers played a key role in designing and delivering the project, The seven projects funded through Moving Up used a wide range of different approaches to break down barriers to progression and employment for different groups of people who are disadvantaged in the workplace.

This research has considered the approach taken by the seven Moving Up projects². These are:

Project Title	Lead Organisation	Target Group
Positive Moves in the Workplace	PATH (Scotland)	People from BME ³ Communities
Gender Equality Works	Scottish Trade Union Congress	Women in Renewable Energy
Equality Mentoring	Scottish Trade Union Congress	People from BME Communities in Higher Education
The Equality Academy	Glasgow Centre for Inclusive Living	Disabled people
Step up!	Edinburgh Napier University	Women in Engineering, Renewables and Manufacturing
Nursing Career Opportunities Project	NHS Lothian	People from BME Communities in Nursing
Challenging Hidden Barriers in the Workplace	Glasgow City Council	People from BME Communities/ Women/ Disabled people

Figure 1 – Moving Up projects supported by Big Lottery Fund

¹ Moving Up Guidance Notes

² <http://bigblogscotland.org.uk/2012/05/21/moving-on-up/>

³ Black and Minority Ethnic

Our research team conducted desk research of project documents (e.g., application forms, project monitoring forms, Big Lottery Fund assessment reports) and consulted with project representatives to understand the approach, rationale and impact to date of these projects, as well as to understand learning that can be taken from the projects. The case studies cover:

1. The approaches that Moving Up projects are taking to engaging and working with specific beneficiaries
2. The rationale for the approaches taken
3. The evaluation activity that Moving Up projects take to demonstrate progress and success in meeting outcomes and achieving impact
4. The key challenges when working to improve outcomes for the Moving Up beneficiary groups.

These seven case studies are presented below. Learning from the case studies is then drawn together to address the above research questions collectively before a discussion on what the projects tell us about the following four research hypotheses:

Hypothesis #1: Support designed specifically for discrete groups disadvantaged in the labour market is an effective way of achieving improved outcomes.

Hypothesis #2: Different beneficiary groups experience labour market disadvantage in different ways.

Hypothesis #3: The industry and /or sector that beneficiary groups are employed in influences the labour market disadvantage they experience.

Hypothesis #4: Asking employers to play a key role in the design and delivery of the Moving Up projects will result in improved outcomes.

Case Study # 1 – Positive Moves in the Workplace

Key Details			
Project Title:	Positive Moves in the Workplace		
Funded organisation:	PATH (Scotland)		
Target beneficiary group:	People from BME communities working in Housing and related sectors		
Partner delivery organisations:	York Consulting: Evaluation partner		
Funding awarded by Big Lottery Fund:	£436,462		
Start Date:	09/06/2013	Duration	5 years
Objectives:	To promote workplace equality and leadership for BME employees and candidates in Housing and related sectors.		

Project Profile

PATH was established in 1998, to address underrepresentation of BME people in the housing and employment workforce. PATH is a small organisation, with a national presence. PATH was established by Scottish Homes to run Positive Action traineeships in housing, until an external evaluation recommended that it be established as an independent organisation. PATH collaborates with a range of partners, including establishing a joint BME network with the Chartered Institute for Housing.

PATH's core work includes 3-year paid traineeships with a work placement and a qualification aspect. PATH provides support, and specialist training for trainees, and support for the work placement providers around recruitment, placement work plans, training plans, and progress monitoring. PATH also runs a wider leadership training programme for BME employees in all sectors, which is validated by the University of Glasgow, with 20-30 participants per year.

PATH's remit is helping BME people to *access work, progress in work and reach leadership positions*. Positive Moves in the Workplace works towards this remit by offering one-to-one support to people working in and aspiring to work in housing and related sectors, some of whom are from PATH's traineeship scheme, and by offering consultancy support to organisations to develop Positive Action action plans and policies.

What was the identified need for the project?

BME people are strongly underrepresented in the Housing sector workforce- only one local authority in Scotland has a representative workforce, and 70% of Social Housing providers have no BME staff at all. Underrepresentation in the workforce can lead to further problems including discrimination, harassment and isolation, particularly when employees are "the only BME person in the workforce". According to Positive Moves in the Workplace there is evidence that higher qualification and experience standards are required of BME employees for the same roles. Targeting BME employees with additional generic support and training constitutes legitimate Positive Action to address underrepresentation in the workforce.

Other specific issues BME people face in housing and related sectors include-

- Cultural barriers
- Unconscious bias in recruitment
- Discrimination in the workplace
- Religious and faith issues, such as recognition of religious dress requirements, fasting or religious festivals

- Language / accents, where English is not the person's first language
- Overseas qualifications not being recognised

The Coalition for Racial Equality and Rights (CRER) have done extensive research into BME employees' underrepresentation in Local Authority employment. For example, CRER sent out identical CVs with different names, and found that employers were less likely to respond to names associated with BME origins.

Why Housing and Related Sectors?

PATH works with housing and related sectors largely because of its extensive experience in the area; although PATH's organisational remit is now wider than the housing sector, it began within the housing sector and maintains strong links with housing employers and sectoral bodies.

Positive Action in Housing does some complementary work, working to reduce racial discrimination in housing on the side of the housing user⁵. Scottish Council for Voluntary Organisations and BEMIS run an Equality Internship Programme aimed at BME staff, but this does not involve Positive Action; PATH representatives said that the common reluctance to engage in Positive Action is because people are often unsure of the legal limits, and are frightened of "getting it wrong". PATH assert that they are the only national organisation providing Positive Action traineeships in Scotland.

What is the project's approach?

Positive Moves in the Workplace is made up of three strands:

- One-to-one mentoring and employability support- "*Aftercare / mentoring*"
- One-to-one *Leadership / coaching*
- Employment Consultancy.

The *Aftercare / mentoring* strand is a series of informal, highly personalised one to one sessions to provide advice guidance or support to BME people working in or aspiring to work in Housing or related sectors. The programme was originally designed to offer a series of six one-hour sessions to ten individuals per year: currently, the arrangement is flexible and personalised, so that individuals can access as much or as little support as they need. This has ranged from a single session to ongoing intense support. Mentoring sessions are delivered by a member of PATH staff, and support ranges from personal development- identifying transferrable skills, gaining confidence, and interview skills- to practical support with completing application forms, or arranging a mock interview. Support also ranges in intensity, from telephone advice to home visits.

The *Leadership / coaching* strand is a time-bound one to one coaching programme which helps participants with tools to develop a career plan; improve leadership knowledge and skills; and improve confidence. Participants sign up for six sessions of tailored, one-to-one coaching sessions with a consultant career coach, lasting 1.5 hours each and normally every five weeks. Participants reported in a promotional video that the programme had helped them with setting smart goals; how to carry themselves and how to interact with managers; how to be heard, and get views across; and self-awareness. The leadership/coaching programme builds on PATH's existing group work with the Leadership programme.

As part of the *Employment Consultancy* strand, a PATH employee provides bespoke support to housing organisations around race equality, including help developing or reviewing Equality Action Plans and delivering training.

⁵ The Director of PATH is also the Vice Chair of Positive Action in Housing.

What is the rationale for taking that approach?

The *Aftercare strand* emerged in response to a need identified for further support for PATH's traineeship graduates; once trainees finished the traineeships and entered employment, many found that they were the only BME person in the workplace, and that there were ongoing issues with isolation and even harassment as a result. The Aftercare strand was designed to support ex-trainees after they had moved into work. However, during the course of delivery, PATH found that there were a lot of applicants for Aftercare support who were not currently in employment, or who were not graduates of the PATH traineeship scheme. As a result, the one-to-one aftercare strand evolved into a more flexible arrangement offering personalised employability support and mentoring, for people who work or aspire to work in housing and related sectors.

PATH commissioned a full evaluation of all its services in 2011, which provided an evidence base for the need for Positive Action in housing; a main finding of this report was that the three factors which trainees and potential trainees agreed were the most important for "creating a bridge to employment" were job-related training, work experience and the support of a black-led organisation.

Employers have supported the delivery of the aftercare / mentoring and leadership coaching programmes by releasing staff to attend coaching sessions and publicising information about Positive Moves to staff.

Outcomes, Monitoring and Evaluation

Positive Moves in the Workplace works towards three outcomes:

- *BME programme participants who work or aspire to work in housing or related sectors demonstrate improved leadership and management ability and improved career aspirations.*
- *RSL/Local Authority Housing Departments improve their knowledge and skills around Positive Action and equality in the workplace.*
- *The wider housing sector understands the employment challenges faced by BME communities.*

Project Monitoring and Evaluation

PATH have commissioned an annual formative evaluation from York Consulting, which includes a national survey of housing providers looking at perceptions of Positive Action and BME barriers to work, and interviews with participating housing associations and participating individuals. PATH has also made two DVDs as part of the evaluation process.

The end of first year evaluation in March 2014 by York Consulting contains the results of a survey of 27 housing associations, addressing outcome 3 by looking at wider cultural perceptions of Positive Action and BME barriers to progression.

Participants in the leadership/coaching strand are asked to rate themselves from 1-10 on 12 self-assessment questions to separately understand participant's confidence, leadership and career aspirations at the first and last session. This "before and after" survey was introduced on the recommendation of the external evaluators, in the first year evaluation report. Since this assessment questionnaire was not in place for the beginning of year one, it is not yet possible to use this before and after data to assess participants' outcomes.

Participants in the aftercare / mentoring strand complete a short survey at every session, asking what the participant wants to get out of a session, whether this was achieved, and drawing up an action plan. In theory participants on the mentoring/aftercare strand also have an exit interview which would relate achievements to a baseline, but as this strand is open-ended, no participants have so far formally ended the support with an exit interview.

On advice resulting from the first year evaluation report, organisations supported through the Employment Consultancy will be surveyed each subsequent year to monitor ongoing impact.

Progress

Aftercare / Mentoring

So far, the mentoring/aftercare strand has supported 28 individuals, with a variety of intensity- "*some people we see 20 times, some people twice*". The total number of sessions delivered so far has been 105, meaning that individuals have attended 3.75 sessions on average. So far, three participants have moved into employment and six into volunteering positions. Anecdotally, the project representatives report that 100% of participants have increased their leadership skills and confidence.

Leadership / coaching

So far, the leadership / coaching strand has supported 19 individuals, ten during year one and nine during year two. One of the participants from year two had completed the programme by of March 2015. As the self-assessment questionnaire was not in place until mid-way through year one, no data is available to assess outcomes for the ten people who completed six sessions during year one. In subsequent years, the self-assessment form applied at the beginning and end of the programme will produce useful information about the distance travelled by participants. The project representatives report that 100% of participants have increased their leadership skills and confidence and progressed their career plans, and 98% have overcome barriers to career progression⁶. Anecdotally, a handful of participants have seen positive outcomes as a result of participation on the leadership/coaching programme; this has included making the decision to retrain in a different field, transferring into a more challenging role within the organisation, and deciding to stay in a current role and seek further qualifications.

Employment Consultancy

In the first two years, ten organisations have been supported to work on their equality action plans and policies. Of the five organisations supported during the first year, two received race equality training for staff; three developed action plans, one reviewed an existing action plan, and two also reviewed their equality and diversity policies. In one case developing an Equality Action Plan resulted in changes to the strategic business plan; in another case implementing an action plan assisted the organisation in a merger with another housing organisation. Of the five organisations supported in year two, one organisation now has a live action plan, and another organisation has reviewed their recruitment schemes, and are in the process of creating a BME staff network.

Key successes

The project representative felt that the main value of the mentoring / aftercare strand was that "*people really appreciate the one-to-one support because they can work at their own pace.*" The flexible formula and ability to visit participants in the community / their own home / libraries means that the mentor can offer support to participants with a range of barriers to accessing support, on their own terms- for example, people who have had a bad experience with group work in the past, or people who find it difficult to use public transport. The aftercare/mentoring project worker said- "*For me it's the smaller steps: you see their confidence lift, and when they get an interview because of your help it's very satisfying. That's the biggest step for both of them.*"

The leadership/coaching project worker reflected that a key strength of the leadership/coaching programme was its flexibility and ability to respond to individuals' needs, and also that participants

⁶ Leadership / coaching first year progress report

appreciated the opportunity to have objective support from someone outside their work environment and field.

Key challenges

Positive Moves in the workplace has adapted to challenges by modifying the delivery model- for example by widening the remit of the mentoring / aftercare strand to encompass unemployed workers and people who did not complete a traineeship, and by shifting the focus from mentoring to general employability support.

Case Study # 2 – Gender Equality Works

Key Details			
Project Title:	Gender Equality Works		
Funded organisation:	Scottish Trades Union Congress		
Target beneficiary group:	Women working in the renewable energy sector, and women working for SME ⁷ s in the private sector		
Partner delivery organisations:	“Close the Gap” partnership project Women’s Enterprise Scotland- mentoring training partner Engender- evaluation partner for final evaluation		
Funding awarded by Big Lottery Fund:	£335,334	Scottish Government funding:	£57,415
Start Date:	Sept 2013	End Date:	March 2015
Objectives:	Support women working in, or who would like to work in the renewables sector in Scotland to plan and progress their careers; and support SMEs in the private sector to improve their gender equalities practice.		

Project Profile

Close the Gap is a partnership project founded in 2001 which works on women’s participation in the labour market in Scotland. It works with policymakers, sectoral bodies, employers, and trades unions to encourage and enable action to address the causes of the gender pay gap.

Gender Equality Works has two separate workstreams: the Women in Renewable Energy Scotland (WiRES) workstream supports women to progress in the renewable energy sector through networking events and mentoring as part of the WiRES network, and “Think Business, Think Equality” (TBTE) works with SMEs to improve gender equality practices.

What was the identified need for the project?

The gender pay gap

Close the Gap’s main motivation is Scotland’s persistent gender pay gap- men currently earn 11.5% more than women on average per hour working full time. This is the result of occupational segregation, lack of flexible working and low part-time pay where women are more likely to have additional caring responsibilities, and discrimination. Women are also paid less on average for work of equal value.

Renewable energy

Renewable energy is a male-dominated industry, in part because of its roots in male-dominated engineering and technical occupations. Lack of access to informal networking opportunities, inflexible working practices, and cultural practices all exacerbate the barriers for women in an already male-dominated field. Around a quarter of employees in renewable energy are women, and the majority of these work in non-technical roles. Of the 500+ WiRES members, only 13 describe themselves as engineers while around 100 are lawyers⁸. The renewables industry has been identified as a growth sector for Scotland, so if the gender disparity in the sector is not addressed it will widen the overall gender pay gap in Scotland. Meanwhile, skills shortages are currently a constraint on growth, making an economic argument for widening women’s access to careers in renewable energy.

⁷ Small and medium-sized enterprises

⁸ Approximate values, as of September 2014

SMEs

Evidence shows a need for gender inequality work targeted at SMEs; SMEs are less likely to have strong equalities practice in place, and are less likely to feel able to invest human resources time to addressing this issue because of competing demands and limitations of scale. Private sector businesses in general are also less willing to talk about addressing gender equality for fear of litigation or competition.

A benchmarking report produced during this project found that while there are other online resources supporting employers to think about gender equality, none fulfil the same need while also being free at point of access. Evaluation of other projects shows that SMEs want flexible support, and resources which they can use on their own terms rather than engaging directly with an equalities organisation. Experience from this project supports this, as companies were offered bespoke equality support, but none opted in.

Approach: WiRES

The WiRES network was formed in 2010 by a collection of women working in the sector. This workstream has developed the network, and Close the Gap has delivered networking events, skills sessions and site visits, a mentoring programme, and developed and hosted the WiRES website.

Mentoring programme

Mentors and mentees recruited from the WiRES membership were trained together in sessions run by the Women's Enterprise Scotland. Once all mentors and mentees were trained, participants were matched using a scoring matrix, including criteria around location, field of work, aspirations and expertise. Pairs were advised to meet four times for an optimum of one to two hours.

Networking events and Site Visits

Close the Gap delivered six networking events for women in the renewable energy sector, helping women to develop their professional networks, share technical skills and information about opportunities. Close the Gap also arranged site visits to renewable energy sites in Scotland.

Corporate membership scheme

Close the Gap offers a WiRES corporate membership scheme. Participating companies can access sponsorship opportunities, raise their profile, demonstrate a commitment to gender equality, and access consultancy services from Close the Gap.

Approach: Think Business, Think Equality

The TBTE workstream has developed and piloted an online self-assessment equalities tool for SMEs in any industry to use. Research based on information collected by this self-assessment tool will be used to influence policymakers and sectoral representative bodies. The intention is that the TBTE tool and resources will remain available for future use on the Close the Gap website.

TBTE employed a light touch approach to engaging with SMEs, based on evidence suggesting that small business owners are reluctant to address equality issues because of both risk to reputation and potential cost. Employers did not have to directly engage with the project team to use the free self-assessment tool.

The tool consists of a series of questions, a checklist, and accompanying guidance available for download. Users register for the tool by giving minimal information about the company including sector and number of employees, and then five modules are made available: Workplace Culture; Flexible working; Women's jobs, men's jobs; Progression and promotion and Pay and reward.

Dissemination

Close the Gap planned to disseminate learning from the two Gender Equality Works projects in a series of events at the end of March, with publications alongside.

What is the rationale for taking that approach?

A survey of women at the WiRES Scottish Parliament reception in 2012 asked women about the types of services they would like to see delivered, and respondents were positive about mentoring and technical coaching; 60% expressed an interest in receiving one or both of these options. There is a strong evidence base for mentoring and women-only networking creating opportunities for women in male-dominated fields.

Close the Gap considered several different models for a self-assessment toolkit; while similar such resources exist already, they are often not free at point of access, and are either over-specific to a particular sector or overly generic, so as not to combat specific issues experienced by women in male-dominated fields. TBTE was designed to fit the space in between these.

Outcomes, Monitoring and Evaluation

Outcomes and Indicators

Gender Equality Works is working towards four outcomes:

- *250 women in the renewables sector or who are qualified to work in the sector and wish to do so, have increased capacity to progress within the renewables sector*
- *Private sector SMEs have a self-assessment tool that enables them to identify ways of equality-proofing their employment practice*
- *Women working for private sector companies who engage with the “Think business, think equality” pilot benefit from gender-sensitive employment practices*
- *Stakeholders providing business support and making policy have better information, tools, and evidence for interventions on equalities*

Outcomes relating to participants in the WiRES project are compared against the results of a baseline survey of WiRES members before the start of the project. This provides a useful “before and after” comparison, although it does not take into account any “baseline” personal development which might happen in the absence of an intervention, or differences in WiRES membership over the course of the project. As all surveys taken as part of the WiRES project were anonymous, it is not possible to compare individuals’ journeys.

Project Monitoring and Evaluation

A baseline online survey at the beginning of the project asked WiRES members about their career confidence, aspirations, and barriers. Every WiRES event was followed up by an anonymous online survey. Small changes to the event format were made as a result of early feedback, for example around event timing.

In the mentoring programme, both mentors and mentees completed a survey at the start, interim and end points of the project to identify their career goals, progression routes and networks. Eight mentoring pairs agreed to be interviewed as part of the evaluation.

Two focus groups were held, engaging eleven WiRES members to further explore the barriers facing women in renewables and to inform future work. Close the Gap completed an in-house interim evaluation of WiRES and is in the process of evaluating the TBTE tool; an external evaluation of the WiRES project is currently being prepared by Engender.

Progress- WiRES

Membership

The WiRES network currently has 553 members, up from 80 at the start of the project; members can attend meetings and events and take advantage of a LinkedIn group.

Networking events and Site Visits

From Nov 2013 to Dec 2014, Close the Gap held six networking events for WiRES members, in Glasgow, Edinburgh and Aberdeen. Between 24 and 48 people attended each of these events. We estimate⁹ that between 101¹⁰ and 204¹¹ women attended at least one event. Close the Gap arranged four site visits in 2014, which were attended by between 8 and 40 WiRES members each. Assuming no overlap between attendees, 87 people attended a site visit.

Mentoring

The mentoring programme has 34 mentor/mentee pairs. The steering group intends to continue the mentoring programme with alternative funding, as there is a clear demand for a next round. During the evaluation process, eight mentor/mentee pairs agreed to be interviewed by the external evaluators; two of the mentees had progressed in work since having a mentor.

Corporate members

Four companies have joined WiRES as corporate members, providing a small income stream for the sustainability of the network.

Progress- Think Business, Think Equality

21 users registered to use the Think Business, Think Equality tool, and nine of these completed at least one section; five of these completed more than one. Three of these users completed an evaluation survey. The TBTE guidance publications have been downloaded anonymously around 300 times from elsewhere on the website.

Key successes

Momentum

Project representatives reported that the biggest achievement has been the momentum generated by engaging women working in the renewable sector. In keeping with WiRES' origins as a grassroots network, members engaged through this project have gone on to initiate local, informal meetups. Project representatives reflected that a key success for WiRES was making the transition from an informal online grouping to an official membership system; this was achieved by word of mouth, including social media.

Evidence base

Close the Gap project representatives described the key strength of the WiRES project and TBTE as their policy of basing delivery model on a strong evidence basis, with respect to both the basis for doing the work, the types of barriers affecting women in a) the renewable energy sector and b) SMEs, and on the effectiveness of different types of intervention.

Key challenges

Engaging SMEs

Engaging SMEs and monitoring how employers were using the TBTE tool to change their practice was a major challenge for the project. Use of the tool itself was lower than hoped, although the guidance documents were widely downloaded, bypassing the tool. In addition, although users were invited to contact the team for bespoke one-to-one support, whether in person or at a distance, no users took up this offer.

⁹ As the feedback forms were anonymous it is not known how much overlap there was between the attendees of the events

¹⁰ Minimum total number of attendees, assuming every event within each city was attended by the same people and nobody attended events in more than one city

¹¹ Maximum total number of attendees, assuming nobody attended more than one event

Endorsement

The project team reflected that to succeed, the TBTE toolkit would need further development and investment in awareness-raising as well as endorsement from organisations with a strong and trusted presence in the SME community, such as the Federation of Small Businesses. A representative noted that partnerships with the Scottish Government and the Equality and Human Rights Commission may contribute to SMEs' perceptions of the tool as regulatory or critical rather than helpful.

Anonymity

The project team felt that they were treading a difficult balance between keeping a light touch and collecting impact data. While it was not mandatory for users to enter the company name or job title, the minimum contact details required for registration were the user's name and email address, allowing the project team to contact users for follow-up evaluation. This level of identification may have put some potential users off engaging with the tool.

Administrative burden

Although the tool was designed to be "light touch", the introduction describes the five modules as each taking "no longer than 30 minutes" to complete. This time investment may have put off some potential users. Web analytics suggest that some users stopped after introductory text between modules; in the next version of the tool, these may be removed.

WiRES challenges: Coordinating mentoring

Although the WiRES mentoring programme was seen as a major success, there was some poor feedback about the mentoring training; in addition, a minority of participants reported a poor match between mentor and mentee. In a future round, the project team would review the matching factors used to match mentors with mentees. Difficulties agreeing on dates for training also created delays to the start of the programme, as mentoring pairs could not be matched until all participants had completed their training.

Case Study # 3 – Equality Mentoring

Key Details			
Project Title:	Equality Mentoring		
Funded organisation:	One Workplace Equal Rights (OWER) Scottish Trades Union Congress		
Specific target beneficiary group:	BME workers in the further and higher education sector		
Partner delivery organisations:	Six partner institutions (universities and colleges) – roles including advertising for mentors and mentees Cymbiosis – training partner, including evaluation of training Centrifuge – formative evaluation partner		
Funding awarded by Big Lottery Fund:	£247,336		
Start Date:	August 2013	End Date:	June 2015
Objectives:	To remove barriers to progression for black and minority ethnic workers in the further and higher education sector in Scotland		

Project Profile

One Workplace Equal Rights (OWER) is a broad project which has been run by the Scottish Trades Union Congress (STUC) for 11 years to help STUC address inequality issues, particularly but not exclusively around racial inequality. One Workplace Equal Rights also works with the equality committees of different unions.

The Moving Up project “Equality Mentoring”, delivered by OWER, provides mentoring opportunities for BME staff in the further education or higher education sector, in order to help these individuals progress in the workplace. In practice, the project has delivered wider impact through additional activities and outputs, such as awareness raising activities and toolkits to help institutions address inequality issues beyond the life of the project.

What was the identified need for the project?

In the design phase of the project, the team had identified a number of issues from their research that identified the need for the project, such as:

- Lower proportions of BME staff in academic positions than white staff
- A gap in the provision of Positive Action projects for BME employees in Scotland
- A growing BME population in the workplace, particularly younger employees
- A strong link between tackling racial inequality and Scottish Government National Outcomes
- Support from the Scottish Funding Council for projects that go beyond legal compliance on racism
- Little evidence of BME staff in promoted posts in FE

Project representatives noted that barriers to progression for BME workers are often internalised; some participants in the equality mentoring programme did not feel that they had experienced racial discrimination even though they had not progressed as much as equally qualified white peers.

Project representatives also stated that there is need for this project due to concerns that race has “dropped off the agenda” in Higher Education because of a focus on the Athena SWAN Charter, which promotes gender equality in Higher Education¹². While the founders of the Athena SWAN Charter¹³

¹² <http://www.ecu.ac.uk/equality-charter-marks/athena-swan/>

are currently trialling a “*race equality charter mark*” in UK universities, project representatives felt this is unlikely to be impactful in Scotland as it goes no further than current Scottish statutory equality duties.

Other similar work

The project had identified that while there has been significant work on improving progression for BME academics in London, this was the first Scottish BME higher education programme; and that there is need for a Scotland-specific programme because UK-wide programmes are not sufficiently tailored for Scottish demographics and Higher Education structures. This was supported by the argument that a previous UK-wide programme tried to engage Scottish institutions but only one Scottish university took up the opportunity.

What is the project’s approach?

The project is taking an approach based on engaging Higher Education/Further Education (HE/FE) institutions and facilitating mentoring of BME staff in universities and colleges. In the design phase of the project, OWER spoke to college and university staff, including principals, to gauge levels of interest in the mentoring project. Initially 11 or 12 organisations expressed an interest, but the project has in practice worked with six institutions, after some institutions dropped out and some merged. The project has taken a two-strand approach of working towards outcomes for organisations and outcomes for individuals.

Key activities in the delivery of the core part of the project were:

- engaging six institutions to raise awareness of the programme and advertise the opportunity to take part in mentoring activities, both as a mentor and mentee.
- running training days for mentors (delivered by Cymbiosis)
- mentors and mentees were expected to meet monthly
- running mentee support network meetings, which took place once every 2-3 months during the project.

The nature of engagement between mentors and mentees appears to have varied, with one mentee describing the mentor as a “friend” and another describing the mentor as “*very structured...high value and highly trained*”¹⁴.

Changes to the programme

While the original intention was to run two separate mentoring programmes, one for research staff and one for support staff, in practice mentoring was combined, as it was felt that this split was impractical and undesirable due to the low number of participants involved. Training sessions and materials were structured to include separate examples of relevance to research and support staff.

The mentoring programme had planned to offer mentoring arrangements between institutions; this was found to be both impractical and counterproductive. Since barriers and cultures were found to vary between institutions, pairing mentors and mentees within the same institution was thought to offer greater impact on both individuals and institutions; this was also important for securing buy-in from institutions.

Work shadowing was originally included as a major strand of this project. In this strand, institutions participating in the mentoring programme would commit to providing a work shadowing opportunity

¹³ The Equality Challenge Unit, <http://www.ecu.ac.uk>

¹⁴ STUC OWER Mentoring Project Interim Report, December 2014, Centrifuge Consulting

for mentees. This was found to be too great a commitment for many institutions. To secure buy-in from institutions, the work shadowing aspect was reprogrammed as an optional extra as part of a more flexible mentoring programme.

Later, outputs were added to the project to build on lessons learned during the project, i.e., the need to disseminate learning from the project more widely, raise awareness of issues highlighted during the project and provide toolkits for employers to understand how to deliver mentoring programmes and how to address unconscious bias in the workplace. These additional outputs, and associated spend, were formally agreed with the Fund during the project¹⁵.

It was decided to run the mentoring programme to March 2015 instead of Nov 2014 to better tie in with the academic year and also account for the late project start. The project has been extended to the end of June to allow time to finish the mentoring and disseminate learning from the project- including to organisations who didn't take part.

What is the rationale for taking that approach?

The project team identified research from Sheffield University which demonstrated the success of mentoring, and noted other examples of success at Imperial College and University of Cambridge. Key features for the design of the project from evidence cited were that the project should ensure that it is well-advertised, should ensure commitment from senior management, should ensure mentors are well trained, should ensure mentees are well supported and should ensure mentoring schemes are supplemented by work shadowing. We note that, in practice, the work shadowing element was not delivered. Project representatives also cited awareness of NHS Lothian's prior work on mentoring for BME staff. In the design phase of the project, OWER also considered their past consultation with Scottish BME workers and trade unionists, which highlighted the importance of mentoring for BME workers for progression in the workplace.

OWER representatives reported that, from the employer's perspective, a major barrier to progression for BME employees is unconscious bias, which particularly affects recruitment, informal mentoring opportunities and networking, but also affects general workplace culture. The main justification for greater involvement of trade unions was based on Joseph Rowntree Foundation research on the links between ethnicity and workplace culture / in-work poverty, which heard from BME interviewees that trade unions were ineffective and lacking in influence. This research again cited the appetite for mentoring.

Outcomes, Monitoring and Evaluation

Outcomes and Indicators

The outcomes for the project are:

- *BME workers in the further and higher education sector in Scotland improve their job prospects by becoming more confident in accessing opportunities in the workplace.*
- *Further and higher education sector institutions participating in the project are better equipped to address the challenges faced by BME workers and offer better support to them.*
- *The further and higher education sector in Scotland has an improved understanding of the issues of BME workers within their organisations*

Project Monitoring and Evaluation

The project has benefitted from support from Centrifuge Consulting who have acted as a formative evaluation partner. Centrifuge set out a logic model against which progress could be measured and then collected and reported on baseline data (for example on mentees' perceptions around

¹⁵ STUC Equality Mentoring Project – Changes to your project form – outcomes, beneficiaries, budget, location, duration

managerial issues, discrimination, institutional issues and mentors' perceptions of equality issues) and followed these up at the interim and final evaluations.

This activity has been used by the project to check that the project is broadly meeting objectives, and identify emerging findings and conclusions which could be built on in later projects, such as considerations of overlaps between racial inequality and gender inequality, which was often cited by project partners as being a key issue as related to the Athena SWAN principles; and the opportunity for *"cross-institutional joint working over broader issues of quality as they impact on BME workers, going beyond mentoring"*¹⁶

Evaluation activity was also used to design new ways to reallocate funding from year one underspend, including designing new activities to raise awareness about and investigate unconscious bias in the workplace¹⁷ and the development of toolkits.

Initial evaluation activity was also used to improve the evaluation framework, ensuring that impact is evidenced as best as possible. For example, in the interim evaluation there were difficulties forming statistically significant conclusions based on the small sample size, and also with tracking longitudinal changes, due to mentees failing to recall their anonymous identification number. These issues have been addressed for the final evaluation process, which also considers the need to consult a control group of mentors and mentees who have not taken part in the project, and for clear reporting of sample sizes.

Additional evaluation was conducted by Cymbiosis, the project's mentor-training partner, who evaluated training sessions. This activity highlighted issues commonly experienced by participants, with unconscious bias being a key theme to emerge. This led to the project developing tools to address unconscious bias.

Apart from the evaluation which is being conducted by partners, the project has not collected data on the number and profile of participants (e.g., staff grade level). It is therefore not possible for our research team to evaluate project activity, e.g. whether mentees indeed met up with mentors monthly and what key successes were achieved in these sessions. It is also difficult to conclude with confidence the number of participants who have been involved in the programme at each stage and in what role.

Progress

The project is close to completion, with final evaluation reporting from Centrifuge Consulting expected March 2015. Until that time, the latest information on project progress in terms of quantitative outcomes held by OWER is contained in Appendix 1.

To the end of December 2014, the project has engaged with six institutions (four universities and two FE colleges) and recruited 17 mentors and 19 mentees. The target number of BME participants was 50, although there is a lack of clarity over whether this includes mentees and BME mentors. It is estimated that about half of the mentors are BME, which means that the total number of BME mentees and mentors is around 27, i.e., below the level of engagement expected. However, a project representative stated that a number of individuals were involved in early activities who have not gone on to receive mentoring.

Key successes

Project representatives report that mentoring has been well-received by participants on both sides, with mentees impressed by the BME-specific support. This is supported by the responses from a

¹⁶ STUC OWER Mentoring Project Interim Report, December 2014, Centrifuge Consulting

¹⁷ STUC Equality Mentoring Project – Changes to your project form – outcomes, beneficiaries, budget, location, duration

small sample of mentees in the December 2014 interim evaluation. Although limited by the small sample size, there is some evidence of a small positive impact on mentees around their management environment. The project team report that mentees have gained confidence and felt increasingly empowered to put themselves forward for promotion– it will be important to investigate the extent to which this is borne out in the final evaluation.

Another key success reported by project representatives is the high standard of training for mentors, given that many other academic mentoring programmes don't offer any training for mentors. Project representatives also report that having a mix of BME and white mentors has increased the opportunity for mentors learning from the process. An example provided was that some white mentors at a senior level have improved their understanding of barriers facing BME people, which has helped raise awareness, promote cultural change and ensure senior institutional buy-in for further equality work.

Key challenges

Project representatives report that arranging regular meetings with managers and unions was a challenge, because of relationship difficulties, associated with fear of industrial action. It took time to get buy-in from organisations with "*nobody wanting to be the guinea pig*". Because of the struggle to get organisational buy-in from principals, there was a degree of self-selection to those institutions that engaged with the programme. It is thought that engaging institutions through HR development programmes might help in future to engage organisations where senior management is not enthusiastic about Positive Action, and where additional cultural barriers to BME progression may exist as a result. The timing of the programme in relation to the academic year was also a logistical problem for the project team, as the funding started in August 2013, too soon to have a mentoring scheme in place for the beginning of the academic year.

Case Study # 4 – Equality Academy

Key Details:			
Project Title:	Glasgow Centre for Inclusive Living Equality Academy		
Funded organisation:	Glasgow Centre for Inclusive Living (GCIL)		
Specific target beneficiary group:	Disabled people, primarily in the housing sector		
Partner delivery organisations:	DWP- referral partner Housing Associations and public bodies- work placements Chartered Institute of Housing- marketing SHARE - Housing training Welfare Rights Officers Forum- advice		
Funding awarded by Big Lottery Fund:	£610,890		
Other funding and source:	£216,000	People and Communities (Scottish Government)	
	£30,000	Glasgow City Council Commonwealth Graduate Fund	
	£75,000	Glasgow City Council Internship Fund	
	£75,000	Third Sector Internship Scotland	
	£49,000	Income generation from services	
Start Date:	30/05/2013	Duration:	3 years
Objectives:	To open up work opportunities for disabled people to advance their career in sectors in which they are under-represented and support private, public and voluntary sector organisations to improve their equality policies and practices.		

Project Profile

Glasgow Centre for Inclusive Living (GCIL) has been operating for 20 years, “*by disabled people, for disabled people*”, offering support, training, housing and employment. GCIL identified a need for a work placement programme aimed at more highly qualified people, as 10% of the applicants to its first entry-level work placement scheme were graduates. The Professional Careers Programme (PCP) ran from 2009 to 2012, offering 25 placements alongside academic qualifications, and helping 22 trainees into work. While delivering the PCP traineeships, GCIL noted a gap in the market for consultancy support to help organisations improve their equality and diversity policies.

Equality Academy is the next phase of the PCP: offering both graduate placements and consultancy support for employers to develop their equality and diversity practices and effect culture change to remove structural and institutional disabling factors.

What was the identified need for the project?

Disabled people in many workplaces experience a wide range of different barriers to work; according to the increasingly recognised social model of disability, these barriers and the disability itself stem from social reactions to difference, rather than from any condition experienced by the disabled person. Under the social model of disability, disability exists in the steps, not the wheelchair.

Some barriers relate to the physical environment, and are created by a physical infrastructure built with non-disabled people in mind; physical barriers include access to transport and building features such as steps, stairways, doorways, bathroom facilities, lighting, and other accessibility features. Funding is available from the Scottish Government’s Access to Work scheme to help disabled people overcome physical barriers to work, but these remain physical barriers because of employers’ ignorance about the availability of support- 40% of employers are unaware of the Access to Work

scheme- and negative attitudes to reasonable adjustments to job roles for what is perceived as a disability.

Underrepresentation of disabled people in workplaces reinforces the institutional discrimination, attitudes and ignorance which exclude disabled people from employment in general and professional positions in particular. Interview stages are a particular bottleneck for disabled people accessing work, particularly when informal recruitment processes are used, as unconscious bias informs interviewers' expectations of what competence looks or sounds like. Employers' anxieties about the cost or difficulty of making reasonable adjustments to a job role may come into play, and disabled interviewees often find it difficult to talk about their impairment or accessibility requirements in an interview setting, in part because of the stigma of disability.

Seven trainees from the existing PCP were transferred to the Graduate Traineeship programme. PCP was oversubscribed by 5:1 so it is anticipated that demand for the Graduate Traineeship programmes will be high.

What is the project's approach?

The project has three strands: Graduate traineeships, Internships and an Employment Consultancy Service.

The Graduate Traineeship scheme follows on from the existing PCP. Traineeships will last for two years on average, and include work experience, technical / vocational skills training, core skills training, guidance counselling, peer support, job search, and aftercare. Trainees are paid a living wage, the cost of which is shared between Equalities Academy and the employer. Traineeships are still mostly in housing organisations due to GCIL's longstanding relationship with the social housing sector, but opportunities are widening into other sectors, for example healthcare, and other roles within the housing sector, for example in human resources and welfare advice.

Compared to the service offered as part of the PCP, Graduate traineeships offer more holistic support, as the placement providers work with the placement organisation to help the employer adapt to the trainee's needs. Trainees are given more autonomy and a greater range of support, including a peer support group. The review process for trainees has been reviewed, and a new more focussed model is used.

Employers providing traineeships are supported through the recruitment process; typically, the employer is encouraged to identify the job description and placement coordinators then advertise the role and do the first sift and shortlisting of candidates; employers typically do the interviews themselves, although a placement coordinator may sit in for support on either side of the table.

The internships are intended as a short-term (3 month) alternative to graduate traineeships, for recent graduates to gain some work experience; placement coordinators help to coordinate opportunities and arrange external funding from a range of internship schemes, allowing the intern to be paid at least national minimum wage, and at no cost to the employer.

The Equality Consultancy Service intends to help 120 employers to understand their equality requirements and improve employment opportunities, leading to five additional graduate trainee places.

Equality Academy's intention is that the Equality Consultancy services will in time subsidise the core services of the traineeships and the internships, securing a transition to a Social Enterprise model. Ideally, the organisational development work will continue to be linked to traineeships, maximising the benefit to both employers and employees.

What is the rationale for taking that approach?

Evidence from the PCP has shown that GCIL's existing model was very effective; 90% of graduate trainees in the PCP entered jobs after completing their traineeship.

Equality Academy's experience so far suggests that presenting organisational support as part of the interlinked package offered around a traineeship helps employers to engage with the support as they are less likely to feel criticised or regulated; on the other hand, having a trainee "on the inside" can be helpful for accelerating the organisational development work.

Outcomes, Monitoring and Evaluation

Project Monitoring and Evaluation

The project has some baseline data on employment rates that they can use against the rate of trainees moving on to employment to indicate progress against outcomes- however this would need to be used with caution because of the selectivity (including self-selectivity) of the traineeship programmes. Individuals' progress -is monitored on an ongoing "distance travelled" basis, giving an internal, individual baseline.

Trainees and interns' activities and details are tracked in a central employment database. Review meetings held every eight weeks assess individuals' progress and ongoing support needs. At each review meeting the individual is asked to answer the question "*how confident are you about entering employment?*" on a scale from one to ten, and yes/no questions on the trainee's progress with core skills, and both parties' satisfaction with the placement. The review also acts as a checklist for action points and potential health and safety, access and support issues. The review report is signed off by the trainee, placement supervisor, and one other GCIL reviewer.

Trainees also engage in a self-assessment process which involves a before/after questionnaire to monitor their own understanding of their access requirements and the Access to Work process. Enabling people to discuss their access requirements confidently with interviewers and managers is thought to be an important step for removing barriers to work.

On completing or leaving a traineeship, trainees go through a final review process including an exit interview.

The central contact database contains detailed personal information about each trainee and intern, including registration data, diversity monitoring, details of every contact, review reports, and responses to all questionnaires. This means that individuals' progress can be clearly tracked.

The Equality Academy also keeps a detailed database of interactions with organisations who access the Employment Consultancy service; organisations are listed against the sector and field of operation, the type of services received, and the stage of service reached.

Equality Academy representatives quoted baseline national statistics on the rate of employment of disabled people in the UK; <1% of employees in social housing are disabled, compared to 23% of the general population. 49% of economically active disabled people in employment, compared to 81% of economically active non-disabled people¹⁸.

An Equality Academy intern is currently exploring options for improving Equality Academy's data collection and reporting. Alongside the ongoing internal evaluation, there are plans to procure an external evaluation to start in the near future.

¹⁸ Economically active people are those of working age (16-64) who are either in employment or unemployed and seeking work.

Progress

Graduate Traineeships and Internships

Of the seven existing graduate trainees who transferred to Equality Academy from the PCP at the start of the project; all seven completed their traineeship, and four of these have entered professional employment. Two of the remaining 3 are unable to look for work because of ill health, and the other is being supported with employability skills by the Equality Academy team.

4Four trainees have entered the graduate traineeship programme since the start of Equality Academy; none of these trainees have yet completed their traineeship. Six interns have started an internship since the start of Equality Academy, and three of these have left and gone into professional employment.

In total, of the 17 trainees and interns who have taken part in equality academy so far, seven report an increase in confidence about accessing future employment; six report no change; one reports a decrease in confidence, and two had no ratings recorded.

Organisations

So far, 11 organisations have taken on one or more trainee or intern placement, receiving HR support and advice as part of the process; two of these have also received some organisational development services relating to policy audit or training; and three other organisations have received some organisational development training.

Changes to delivery

In the course of delivery, the traineeships have evolved to be more flexible in several ways. Traineeships can now last between 18 and 30 months, rather than the two years originally planned; the training and support provided has also evolved to become more personalised to the needs of the individual and the role.

Key successes

Project representatives felt that the main success of the project so far has been the number of positive employment outcomes through the traineeship scheme. The project has also built strong relationships with interns, trainees and organisations, which reflects the strength of the team and its partnerships.

The Equality Academy team have found that traineeships are most effective when the trainee has an integral role, and their work impacts on the workflow of the organisation.

An important factor for successful work with organisations has been paperwork- minimising the administrative burden of involvement for placement organisations has been vital for ongoing involvement and organisational buy-in. It has also been important to sell the organisational development work as business development, and to use the right language with employers to avoid defensiveness about equality practices.

An important achievement of the traineeships work has been the unmeasurable wider impact that trainees' progress has had on society, on participants' family lives, and other benefits; working with organisations alongside offering traineeships is an opportunity to maximise this wider social impact.

Working as part of a well-known organisation with a strong reputation in Glasgow has been important for the development of Equalities Academy, opening gateways into particular sectors. However, this has in some ways limited the remit of the project, which is intended to be Scotland-wide, because of the relative difficulty of making contacts outside of GCIL's umbrella.

The project has been very successful in moving into new market areas including the private sector, through proactive networking at events, marketing and social media. Because of this increase in market share, the organisation itself is now in a better position to provide internal internship placements, and to improve its own equalities practices.

Key challenges

The internships programme has presented a particular challenge to the project team; the changing funding landscape and the variety of different internship schemes has meant that it has been challenging to secure funding for internships. In particular, some of the currently available internship schemes have specific eligibility criteria which create a challenge to match up interns to the right scheme with eligible funding.

As the project team is small, there are some skills gaps; more marketing work is needed to reach potential trainees and interns.

Further Learning Opportunities

Equality Academy makes every effort to engage employers in the delivery of traineeship and internship support, and engage those employers providing traineeships with organisational development support at the same time. Although placement coordinators support employers through the advertising and recruitment process, employers are strongly encouraged to identify the job description and interview the candidates themselves, so that the employers have ownership of the process. Project representatives have found that it is critical to the success of a traineeship to engage the individual who will be directly supervising the trainee at the earliest possible stage.

Case Study # 5 – Step Up!

Key Details:			
Project Title:	Step Up!		
Funded organisation:	Equate - Napier University		
Target beneficiaries:	Women in engineering, renewables and manufacturing		
Partner delivery organisations:	Semta: employer engagement partner HBJ Gateley, offering free legal advice on employment issues Women's Engineering Society, jointly running events		
Funding awarded by Big Lottery Fund:	£442,890		
Start Date:	09/10/2013	Duration:	(3 years)
Objectives:	To address workplace inequality for women in engineering, renewables and advanced manufacturing sectors.		

Project Profile

Equate Scotland was established in 2006, and works to make a positive difference for women in science, engineering, technology and the built environment, working “*alongside industry, academia, the Scottish Government and public bodies, creating positive changes in employment practices and workplace cultures which benefit everyone*”.

Step Up! is a partnership project with Semta, the Engineering Sector Skills Council, to support women to advance in engineering by working to improve women’s networking, skills, and confidence, and by working with employers to work towards a more hospitable working environment for women in engineering.

What was the identified need for the project?

Equate Scotland has a holistic model to address gender inequality in STEM (science, technology, engineering and manufacturing) fields, recognising that the barriers to women’s progression can be both personal, cultural, and institutional; and that work to overcome these barriers should therefore act at both the individual and the organisational level.

Equate Scotland had observed that Government funding through the Equalities Unit and other funding sources are often employee-focused, related to the need to evidence impact through key performance indicators (KPIs). This left a gap in Equate’s holistic model for work targeted at employers directly, which has the potential to change workplace culture and practices. Equate had also identified a need for targeted work in the engineering sector, where the barriers and pressures are different from other STEM fields. The Moving Up programme had a focus on working directly with both employers and employees in a particular sector, which matched with the work that Equate Scotland felt was needed.

Gender inequality in engineering

Equate identified a number of issues regarding gender inequality in engineering which are set out below¹⁹.

¹⁹ Statistics taken from Equate Step Up! project application form

Engineering is one of the most male-dominated industries in the UK. Women make up 20% of the workforce in STEM fields, compared with 49% of the workforce in Scotland as a whole. Women also drop out of STEM fields at a higher rate than men, with only 27% of women with STEM qualifications working in a related occupation compared to 52% of qualified men. Meanwhile, Semta have identified that engineering faces a skills shortage in Scotland. A 2012 report from the Royal Society of Edinburgh estimated that the loss to the Scottish economy of STEM-qualified women working below their qualification or being economically inactive equates to £170 million per year.

Women in STEM fields experience structural, institutional and personal barriers to retention- including social barriers such as working culture, working hours and childcare availability. 33% of women in engineering experience isolation as a result of being in a minority at work, and 61% experience a lack of confidence, which can be related. Being female in a male-dominated work environment can also lead to a lack of role models, social exclusion, heightened scrutiny, being singled out, and a higher bar- i.e. if you are the only woman, you must be exceptional. Where gender imbalance already exists in management, indirect discrimination can be perpetuated as managers are subconsciously more likely to offer informal mentoring, advice, or progression to employees in their own image.

Some practical barriers in engineering also create an inhospitable working culture for women, for example a lack of protective equipment in women's sizes, and practical barriers to flexible or part time working. Engineering employers are often small or medium sized enterprises (SMEs), which may create additional barriers to women's progression as SMEs are more likely to have opaque progression routes, often lack HR knowledge and confidence, and face practical barriers to implementing flexible working arrangements.

What is the project's approach?

Step Up! follows a two-strand approach: coaching, events and workshops are aimed at women; and seminars, training and other support services are aimed at employers.

Services catering to women include:

- *The Career Enhancement Programme*- an in-depth programme taking place over three days, with one session per month, for women to explore internal and external barriers to success, Myers-Briggs Type Indicator (MBTI) typology and communication styles, and leadership potential, delivered once per year.
- A series of one-day workshops and events delivered multiple times in different places
 - *Sticky floors and glass ceilings*- a career development course exploring the internal and external barriers that hold women back
 - *Meet the professionals* networking events
 - *Returners relaunch / Returning to work*- a career development workshop aimed at women thinking of returning to work after a career break
 - *What employers want*
 - *Industry Insight event*
- *Coordinating work experience placements*
- *Coaching for Success*, an individual career coaching programme of five hour-long sessions offered at a highly discounted rate.

Services catering to employers include:

- *Employers' seminars*- a series of three half-day events for employers, on the talent pipeline, retention and recruitment, and moving women into leadership
- *Unconscious bias training*- this has been adapted from Athena SWAN unconscious bias training for academics; the delivery of this is currently under development.

- An Organisational Coaching Programme, which is currently under development, providing employers with a bespoke coaching model tailored to their needs and which encourages learning and change at an organisational level.
- A survey of 500 employers to investigate institutional and structural barriers to women's progression in engineering

What is the rationale for taking this approach?

A 2012 Royal Society of Edinburgh report showed that an industry-wide approach to gender equality in employment is particularly important for SMEs, for whom investing in in-house support or integrating flexible working practices is often impractical due to scale.

There is strong evidence that among women who intend to go into engineering at the end of their studies, those who did work experience during their studies are more likely to be retained in the sector than those who had no prior work experience. This protective effect is stronger for women than for men. This justifies the offer of work experience placements as well as the focus on networking opportunities for women.

Outcomes, Monitoring and Evaluation

Step Up! is working towards four outcomes:

- *Women are better prepared for progress in the SET²⁰ sectors.*
- *Female STEM students and graduates are better prepared to enter into employment in the SET sectors.*
- *Qualified women are better prepared to return to their careers in the SET sectors.*
- *Employers in the SET sectors are better informed of the benefits of a diverse workforce and committed to developing good practice in gender equality.*

Project Monitoring and Evaluation

Step Up! has an extensive monitoring framework, and there is a budget to carry out an external evaluation, which has not yet been commissioned. Internal evaluation of the programme is ongoing; data will also be made available to Edinburgh Napier University's Employment Research Institute (ERI), and Equate Scotland hopes to secure funding for a research project in partnership with ERI using data from Step Up!. All women making first contact with Equate complete an introductory survey, which asks about confidence, skills, and career opportunities. This provides "baseline" data for a longitudinal impact study. As the survey is anonymous, it is not possible to get the breakdown for attendees at a particular Step Up session, and individual journeys are not distinguishable; however, this is an important measure of Equate Scotland's wider impact.

Every workshop or event has an anonymous feedback questionnaire. After each event the project team create an Event Report summarising the event format, attendees, how the event was promoted and event feedback. Event feedback questionnaires vary from impact-focussed to gathering practical feedback depending on the intensity of the event.

The Career Enhancement Programme involves a series of self-assessment surveys to monitor personal journeys- there were 15 participants to this programme in year one, and participants will be contacted three and six months after their last session to discover what decisions were made as a result.

Participants of the employer seminars will be surveyed six months after to discover what actions were taken as a result. Participants of the coaching sessions will be asked to write a report.

²⁰ Science, Engineering and Technology

Feedback from events has already been used to tweak the delivery of the project, for example by altering the timing of workshops to improve accessibility, shifting the focus of employers' seminars towards more peer sharing of information to improve engagement.

Progress

Working with employees

In year one, Step Up! supported 15 women through the three-day Career Enhancement Programme. Feedback was very positive, and participants described the programme as *"transformational", "engaging", "incredibly helpful, informative and thought-provoking"*. One participant said *"I came in sceptical and left feeling confident, influenced and much happier in my role"*.

In year one and the first few months of year two, Step Up! has delivered five workshops with between eight and 34 attendees each, two events in partnership with 31 and 120 attendees each, one bespoke training event with 11 attendees, and the Career Enhancement Programme for 15 participants.

It is not possible to say how much overlap there has been between attendees at events, as registers are not kept and feedback is anonymous except in the case of the Careers Enhancement Programme. However, the total number of women attending any Step Up! events and workshops so far is between 120 and 291.

The total number of women attending Step Up! events that were not in partnership with other organisations is somewhere between 34 and 120. Step Up! representatives reported that employees who have participated in events walk away with increased confidence, negotiating skills, other skills, resources and tools, and a recognition of their options. *"It gives them the vocabulary to talk about it"*.

The organisational coaching programme is under development within Step Up!. The project will build on the successes of Equate Scotland's existing organisational coaching, which has offered subsidised coaching to employees at two organisations.

The work experience programme has proved challenging to implement due to an unforeseeable duplication of a service offering more funding. No work placements have been arranged through Step Up! so far.

Working with Employers

Employer engagement began in year two. So far, one of the three employers' seminars has been held, with 12 employers in attendance. Feedback from this event was very positive, and participants described the event as *"a valuable opportunity for employers to share their experiences and ideas"* and *"a really useful forum to share best practice and create a common understanding and identify some solutions"*

Key successes

Step Up! has shown that women's engagement is definitely working. There is no struggle to get people to come to events, and repeatedly. Women have gone to great lengths to come to events- including one person visiting a one-day event in Aberdeen from the south of England, and one person taking annual leave to attend the Career Enhancement Programme. Project representatives reflected that meeting the needs of female employees and female STEM students has been complementary- both sides benefit from networking and mentoring relationships.

The Career Enhancement Programme has been a real success- *"it is a luxury to be able to offer a three-day course for free"*. Key to this success was that Step Up produced a leaflet outlining the business case for attending, from both the employers' and employee's perspective. This proved to be important for securing buy-in from employers.

Key challenges

Although the employers' seminars have been well received, representatives noted that engaging with employers has been challenging for Step Up! in three ways. Firstly, restructuring at Semta left this project under-resourced and with a loss of contacts. As a response, Equate Scotland is trying to develop a more strategic approach to employer engagement. Secondly, an unforeseeable duplication of work placement schemes meant that Step Up!'s work placement offer was less attractive for employers. Thirdly, Step Up! report that winning trust from employers is challenging in itself, because employers expect work to address inequalities in the workplace to be punitive and regulatory rather than helpful. The difficulty is *"getting them to see us as enablers rather than finger-waggers"*.

Further Learning Opportunities

Employers have been and will be primarily involved in Step Up as recipients of support to create a working culture and working practices that are more hospitable for women. The employer's perspective has been represented in the design of the programme via Semta, the Engineering Sector Skills Council and a design and delivery partner. Employers' "buy-in" is also very important for the success of Step Up's work with employees, particularly through the Career Enhancement Programme, Coaching and work placements; Step Up! achieved this for the Career Enhancement Programme by outlining the business case for involvement in a leaflet for employers and employees.

Step Up's extensive monitoring and evaluation plans have the capacity to generate valuable information about what works to address gender inequality in STEM fields; this is in part because the project did not restrict its aims for impact, evaluation and research to the outcomes listed in the bid. Equate Scotland's wider research output is likely to generate evidence about the barriers experienced by women in STEM and the best methods to combat them.

Case Study # 6 – Nursing Career Opportunities Project

Key Details			
Project Title:	Nursing Career Opportunities Project		
Funded organisation:	NHS Lothian		
Specific target beneficiary group:	BME Nurses in NHS Lothian		
Partner delivery organisations:	Edinburgh Napier University- Evaluation Neish Training ²¹ – Mentor training.		
Funding awarded by Big Lottery Fund:	£571,291	In kind funding from NHS Lothian:	£186,518
Start Date:	March 2014 ²²	End Date:	March 2019
Objectives:	To improve career opportunities for BME nurses through leadership development activities, management mentoring, development of existing BME staff network and equality awareness across the NHS.		

Project Profile

NHS Lothian is a major public sector employer in Scotland, with over 20,000 full time equivalent (FTE) employees²³. Nursing staff comprise 50% of the total FTE workforce. The “Nursing Career Opportunities Project” aims to tackle particular issues around the lack of progression to management positions amongst BME nurses through training and mentoring.

What was the identified need for the project?

The particular need for a project targeting progression of BME nurses was based on workforce management data, which showed that while non-white nursing staff comprise 6% of the total number of registered nurses on the system, the majority remain at generic staff nurse level on band 5; in 2011/2012 BME nurses made up around 0.5% of Band 6 and 7 nurses (junior management and specialist nurses) and there were no BME nurses at level 8a or above.²⁴ Barriers to progression identified for this target group include discrimination, increased scrutiny, cross-cultural issues (i.e., tension resulting from variation in cultural values and norms, and inaccurate assumptions about culture), lack of professional social capital and confidence.

NHS Lothian also identified that there had been a disproportionately high number of Employee Relations cases involving BME nurses, including both disciplinary cases and grievances. Project representatives felt that this may be linked to a tendency amongst managers to avoid resolving conflicts with BME nurses at an earlier stage, perhaps for fear of being perceived as discriminating based on race.

²¹ Note that Cymbiosis were originally planned to provide mentor training but did not pass NHS procurement processes. After further procurement, Neish Training will now provide this element of delivery.

²² Although the criteria for project delivery would be that the project start no later than seven months from the offer letter (November 2013), delays in signing off the contract from NHS Lothian led to the project starting in March 2014.

²³ NHS Lothian Workforce Plan 2014/15, July 2014. Data stated are for March 2014.

²⁴ Nursing Career Opportunities Project application form (0.5% figure inferred)

What is the project's approach?

The project is operating across four main strands. These are outlined below:

Enhanced Leading Better Care Programme – “Leading Across Difference”

This first strand of work involves BME nurses accessing an optional “enhanced” version of the existing Leading Better Care (LBC) leadership development programme, which is available to all nurses. The enhanced programme includes additional content (cross-cultural issues, self-awareness, communication skills, assertiveness, awareness of advisory services) and takes six and a half days rather than three days in the core LBC programme, and also includes the opportunity to access mentoring. A key part of the programme is that, after five full days of training, there are three half day sessions for reflective learning.

Mentoring Opportunities

BME mentors are being paired with mentees (BME nurses who are taking part in the extended LBC programme), to provide longer term support to these nurses over the time period that they are engaged with the training and beyond. The current bank of mentors come from a previous BME mentoring programme at NHS Lothian, but a key part of the project will be to recruit new mentors – particularly BME mentors, including those who have completed the extended LBC programme - to take over from the existing mentors, who are majority white. Mentors receive 2.5 days training from the mentor training delivery partner.

Coaching line managers

A third strand of the project targets line managers of BME nurses, who are to attend the enhanced LBC programme and also to receive one-to-one coaching on equality issues.

Developing a positive workplace culture in NHS Lothian

Finally, a fourth strand - “Developing a positive workplace culture in NHS Lothian” is a sub-project delivered via a web-based cultural awareness resource, communication of workplace equality issues, recruitment of BME staff into a “Confidential Contacts” scheme, and more targeted management training in equality & diversity (paid for by NHS Lothian).

What is the rationale for taking that approach?

The evidence base for the project's approach was taken partly from the current Head of Equality and Diversity's involvement with a previous BME mentoring scheme in NHS Lothian (2008/09). This project highlighted particular issues around practice and progression with BME nurses, and led to a research project which consulted a wide range of stakeholders, including BME nurses and nurse managers²⁵. A steering group was then set up to look at different approaches to tackling this inequality in the workplace – project representatives report that previously there were no specific initiatives to tackle lack of progression amongst BME nurses at NHS Lothian.

A key principle behind the design of the project was that the training should be framed as part of the existing Leading Better Care (LBC) project, which was well-respected and had received positive evaluation, to ensure the credibility of the project both with participants and with peers. The enhanced LBC programme included supplementary “equality content”, with some sessions to be delivered by specialist external providers. The mentoring has been designed to be flexible and needs based, and one of the main purposes of mentoring is to ensure the long term sustainability of the work, instead of relying on the time-limited “boost” of training to BME nurses during the LBC programme.

²⁵ Project representatives did not know exactly who these stakeholders were: the person responsible for the research project and initiating Nursing Career Opportunities Project has moved on to become Head of Equality and Diversity and is no longer directly involved in the project.

Outcomes, Monitoring and Evaluation

The outcomes for the project are:

- *250 nurses from BME backgrounds will gain leadership skills, improved self-awareness and increased confidence at work from the Leading Better Care tailored leadership development programme.*
- *At least 25 BME nurses will attain promotions into nursing management pay bands (AFC²⁶ Band 6+)*
- *84 staff (at least 50% of whom will be from BME backgrounds) will report being more knowledgeable, more confident and more effective as mentors of minority ethnic colleagues.*
- *120 Nurse managers who line manage BME nurses will benefit from additional coaching, support and training to help them support the nurse's development.*

The target number of 250 BME nurses chosen to take part in the extended learning programme was based on 50% coverage of the estimated 500 BME nurses in the workforce. This was felt to be achievable and would represent significant coverage. The target of 25 nurses achieving for progression was based on what was considered to be feasible, rather than a proportional improvement on a baseline. Project representatives suggested that the lack of increase in BME nurses at Band 6 or higher in recent years shows that baseline progression is very low.

While project representatives reported that it is not possible to formally compare the extent to which outcomes would mark a significant improvement over what was previously happening, we note from project documentation that NHS Lothian's employee management IT system makes it technically feasible to compare the promotion rate and rate of completion of (all) training between participating nurses and a) BME nurses not participating in the scheme, b) BME nurses prior to the scheme, and c) non-BME nurses.

Project Monitoring and Evaluation

The project representatives stated that the project is undertaking an action learning research methodology, using extensive survey data of BME nurses and mentors throughout the programme to make alterations to the way the project is delivered on an ongoing basis. Project representatives feel that this additional evaluation activity (i.e., beyond the reporting of hard outcome indicators) is crucial for the project's success.

A Masters student studying under a leading Professor on ethnicity and gender issues from Tilburg University (Netherlands) visited NHS Lothian and collected baseline data in 2014 and will report back to the project in April 2015. This is designed to inform the construction of questionnaires for nursing managers, as part of the action learning programme. Project representatives stated that while there is no formal formative evaluation partner, strong links with Edinburgh Napier University and University of Edinburgh would provide opportunities for partnership working during the project as required. A steering group and an operation group have been established, and these meet to assess the programme's progress and discuss ongoing delivery plans.

Notably, project representatives stated that the project funded by the Fund has now grown into a much wider project with funding from NHS Lothian and that monitoring and evaluation criteria required by NHS Lothian are more intensive than the Fund's requirements. Unfortunately, our research team were unable to access project monitoring data due to issues of confidentiality, but project representatives reported that due to the higher monitoring requirements of the internal funding, it would be no problem to evidence the outcome indicators required by the Fund.

²⁶ Agenda for Change

Progress

The five year project started in March 2014 and is therefore in its early stages. We note that this is a delay of approximately six months on the starting time of the project, with the funding offer letter stating that the project should start not later than six months after the signed grant agreement (due in May 2013). Early progress towards the outcomes up to the end of January 2015 (i.e., in year one) are shown in the outcome indicator table in Appendix 1. While progress has been limited in terms of hard outcomes so far, project representatives report that there is a hope for a snowballing effect from participants reporting a positive experience on the programme encouraging more to take part.

Three nurses have so far progressed into higher positions as a result of the project; these are the two nurses acting as lead facilitators for the programme and one other nurse who received informal support. Project representatives report that, while this informal support has led to a positive outcome, there will be an ongoing need to manage expectations around what project facilitators can or should provide in terms of informal support, and that this support must be placed firmly in a context of promoting independence amongst BME nurses.

Key successes

The project is still in its early stages in terms of outcomes achieved, as demonstrated by the indicators reported in Appendix 1. As such, it is not possible to fully assess the key project successes at this time. However, the project representatives reported four elements that have worked well in terms of delivery so far:

1. Having project facilitators from a BME background who are able to build relationships with the BME community.
2. The focus on challenging people's views, both personal and organisational, even when this is uncomfortable. The project reports that success in this respect is heavily reliant on the strength of character and resilience of the two project facilitators.
3. Educating the incoming workforce about inequality issues by raising awareness of the programme in all staff inductions (including medical staff and allied health professionals). In so doing, the project is being seen as a "kick starter" for tackling BME inequality more widely.
4. Higher than expected interest in staff becoming mentors across a range of staff roles, including Allied Health Professions, Medical Consultants, Nursing staff. Project representatives consider it important to the success of the project that mentors do not have to be nursing staff. We note that, while there has been a high degree of interest, numbers who have formally registered are low, meaning that work will be required to ensure that interest is converted to action.

Overall, the project representatives estimated that early activities in awareness raising have meant that around 250 staff across NHS Lothian are now aware of the project.

Key challenges

Project representatives expressed uncertainty about the level of impact expected from the online resource. This has been piloted with BME nurses, but there is awareness now that computer access may be a barrier to success, as only the charge nurse typically has access to a computer.

The key challenge identified by project representatives was that, when the project team has talked to BME nurses who had been employed at Band 5 for many years in NHS Lothian, they heard reports of long-standing issues around having been neglected and under-appreciated, but that there was often an associated desire not to "open this up" and address the issue. In other words, many BME nurses have dealt with inequality issues by not thinking about them, and appetite to take part in the scheme was therefore not always as strong as expected. The project representatives reported that a powerful way of reawakening appetite for tackling progression barriers had been showing such BME nurses statistics on lack of progression amongst their characteristic group. Interestingly, project

representatives said that the same experience was not found with BME nurses who were new to NHS Lothian (either newly qualified or having moved from another health board), who were more likely to naturally have a stronger appetite to be involved in the scheme and tackle any progression barriers they faced.

Another challenge reported is the difficulty around working with others' strongly held views on BME inequality issues. As an example, applicants for the posts of project facilitators were invited to BME nurses only, and this was seen by some as "special treatment".

In terms of the project's design, it has been felt that a lot of the design is ongoing, with a key part of early work for lead facilitators gaining further understanding of the best way to structure the project to meet needs "on the ground". It was felt that with a longer timescale to develop the project application before submission to the Fund more of this design could have taken place before project delivery phase.

Further Learning Opportunities

To what extent have employers played a key role in the design of the project?

Project representatives emphasised the importance of including managers in the delivery of the project. The project has identified the importance of nurses and managers signing up to a tri-partite agreement and there is currently an emphasis on ensuring more managers commit to this in order to support nurses in taking time away from the ward to attend the extended LBC training programme. Project representatives report that such tri-partite agreements have worked in the past for ensuring sound relationships between nursing and medical staff.

At the end of the extended LBC training programme, managers and chief nurses are being brought together to see how action plans will be put into practice, and how this will be supported by managers. This is designed not to single out managers, but rather to bring them together and create a joint commitment to tackling this particular inequality.

While project representatives suspect that managers who are currently most involved are those who already had a particular tendency towards tackling inequality issues, there is a hope that action learning throughout the project will help tackle this issue.

Case Study # 7 – Challenging Hidden Barriers in the Workplace

Key Details		
Project Title:	Challenging Hidden Barriers in the Workplace	
Funded organisation:	Glasgow City Council	
Specific target beneficiary group:	All recipients of unconscious bias, all sectors, Glasgow-wide	
Partner delivery organisations: ²⁷	1) University of Strathclyde- Research Partner 2) Yet to be appointed – Evaluation partner 3) Brodies LLP solicitors - legal training and advisory partner 4) Glasgow Employer Diversity Forum- Dissemination partner 5) Glasgow Chamber of Commerce- Dissemination partner	
Funding awarded by Big Lottery Fund:	£496,947	
Other funding and source:	GCC in-kind staff costs	£55,554
	GCC in-kind office accommodation costs	£24,000
Start Date:	May 2014 ²⁸	End Date: May 2017
Objectives:	To tackle unconscious bias which exists in the workplace for women, BME or disabled people through a combination of research activity, organisational interventions and individual support to employees across a range of organisations.	

Project Profile

The project “*Challenging Hidden Barriers in the Workplace*” is a project delivered in partnership between a number of significant partners in Glasgow, including Glasgow City Council, University of Strathclyde, Brodies LLP and Glasgow Chamber of Commerce. The project aims to work with employers and their employees to understand different levels of unconscious bias and address this by a number of “organisational interventions” (described further below).

What was the identified need for the project?

The project focusses on the need to go beyond typical approaches to equality in the workplace (i.e., with an innovative approach such as unconscious bias) and therefore focussed on the evidence that supported the notion that legislation is not enough. In the design phase of the project, the project team highlighted a number of key issues which supported the need for a project which addresses issues across all three Moving Up target groups in an innovative way:

- The need to address discrimination in the workplace at a UK level to promote more inclusive working environments and manage exposure to “prohibitive” costs of defending discrimination claims before the Employment Tribunals.
- Persistent pay gaps across the three groups, many years after the introduction of the Equal Pay Act²⁹ (gender), Race Relations Act (race) and Disability Discrimination Act (disability)

The team also consulted employees through focus groups and employers at the Glasgow Equality and Diversity Forum to understand views from different perspectives about the challenges around perceived and actual barriers to progression. Key to this was the need for employers to be more transparent in their practices around recruitment and progression

²⁷ NB: Innermetrix were originally intended to assist as assessment and coaching partner but later removed from the project team

²⁸ NB: Funding was confirmed in September 2013 but delays to the project meant that the start date was later than planned

²⁹ As supported by data from the Annual Survey of Hours & Earnings 2012

In our research, a project representative again emphasised the importance that of pay gaps in the three protected characteristic groups, and that the real issue which underpins the project is the finding that there is a persistent disadvantage for these groups despite robust employment legislation.

What is the project's approach?

The project engages people across three protected characteristic groups (race, disability and sex). The project is taking a four strand approach, featuring organisational interventions, career coaching, research and development and awareness raising. This multi-strand approach was designed to make the most impact on individual organisations by working with both employers and employees to identify and address issues around unconscious bias. The strands are further detailed below:

Research and Development

The University of Strathclyde (a partner delivery organisation) are designing and developing an individual attitude test (IAT) for organisational intervention. This will be used to conduct longitudinal research on levels of unconscious bias in the workplace and effectiveness of interventions.

Organisational interventions

Organisational interventions are the project's term for a multi-step approach that will be used to identify and address any unconscious bias in workplaces and provide training to address any bias amongst leaders and middle-managers. Firstly, partners in the delivery team (Brodie's LLP and University of Strathclyde) will meet the leaders of the organisation as part of the employer commitment to the project. Then, as the first step of the intervention, organisations will undertake an organisation diversity audit (which includes profiling the organisation in terms of the number of people in the target groups who are employed at each grade) and create an initial diversity action plan. Following this, an IAT will be disseminated to all employees to understand unconscious bias across the organisation at the outset of the project.

Bespoke training sessions/workshops will then be delivered to the senior managers and line managers by Brodies LLP to raise awareness of diversity issues in the legal framework. The sessions delivered by the University of Strathclyde will allow participants to firstly reflect on their IAT results and design an action plan to address unconscious bias and then, six months later, to reflect on what has been done and build on the progress.

After one to two years the organisation will redo the IAT, focusing on middle managers but available to all. The organisation will then refresh their diversity action plan to ensure that the intervention will be sustained beyond the formal exit point of the delivery team.

Career coaching

As well as the employer-focussed Organisation Intervention strand, the delivery team will provide career coaching for 100 employees³⁰ in the target group who are seeking to progress their careers. Career coaching is designed to help these people overcome hidden barriers, including career assessments feedback and career progression action planning and career-specific skills. These 100 employees will be within the 50 organisations receiving organisational interventions and coaches will be within the priority groups.

Awareness raising

The project will also deliver 12 information events and one conference about equality and diversity to employers across Glasgow, as well as raising awareness through a website with access to the IAT.

³⁰ Revised down from 300 in an initial application, in order to focus on a higher quality of intervention for a smaller number of individuals.

What is the rationale for taking that approach?

The project's focus on unconscious bias was inspired by the work and teaching of a Business Psychologist, Dr Binna Kandola. Prior to the project receiving funding from the Big Lottery Fund, Dr Kandola delivered a workshop to Glasgow employers across all sectors, with Glasgow Works, Glasgow City of Commerce and Business Gateway having been involved with organising and with promoting the event. The success of this event led directly to a number of the employers present forming a new group to discuss issues around equality, known as the Glasgow Equality and Diversity Forum. Principal to the success of the event was the level of agreement amongst employers that while all employers had robust policies around equality in the workplace, there were still significant unaddressed issues with inequality that required an innovative solution.

The funding opportunity from the Fund was timely in that it allowed the Forum to design and deliver a practical and innovative approach to address issues around inequality and diversity. Initial project proposals focussed on helping organisations reflect on levels and types of Unconscious Bias in the workplace, but the project's scope was then widened to include working directly with employees in the target groups before applying for Moving Up funding.

The rationale for the number of hours of coaching that employees could access was based on similar coaching initiatives previously delivered by partners, and sought to balance sufficient intervention against the possibility of creating employee dependence upon coaches.

Outcomes, Monitoring and Evaluation

Outcomes and Indicators

The outcomes for the project are:

- *By minimising unconscious bias in the workplace, participating organisations will create more inclusive working environments*
- *Women, disabled people and people from minority ethnic communities will be better prepared for (re)entering and progressing in appropriate employment*
- *Employers and wider stakeholders will have increased awareness of the negative impact of unconscious bias in the workplace and how to address this.*

Within the outcomes listed above are a number of key outcome indicators. It is difficult to assess the extent to which the number of outcomes achieved would be a marked difference in what was previously happening – e.g., while it is the case that employers had widely reported that they have plans for tackling inequality and diversity in the workplace, it is the nature of the new approach on unconscious bias which is deemed to be additional by the project. The project intends to use the diversity audit carried out at the start of the Organisational Intervention to provide the benchmark against which future success is measured.

Project Monitoring and Evaluation

There is currently no monitoring framework in place. Project monitoring procedures will be established by the new Project Manager, who has recently taken up the post. The project application states that tracking of participants receiving career coaching will be used to identify outcomes achieved including career progression.

The project will engage an external evaluation partner to help the project understand the nature and extent of the positive impact it has made. While this role was originally intended to be the University of Strathclyde, the University identified a potential conflict of interest related to their specific involvement in delivering elements of the project. Instead, the role of evaluation partner was put out to tender and a shortlist of candidates are now being interviewed.

Progress

Progress towards the outcomes are shown in the outcome indicator table. We note that due to delays in the project progress to date in terms of outcome indicators achieved has only been in the area of awareness raising amongst employers, with four of 12 awareness raising events having been held and an approximate 120-130 different people engaged in these.

Of the 50 employers who are intended for Organisational Interventions, informal discussions have taken place with ten of these. Once employers are identified and have subscribed to take part, organisational interventions and career coaching will begin.

Key successes

The project is still in its early stages in terms of outcomes achieved, with only awareness raising events having been delivered to date. As such, it is not possible to judge the key project successes at this time. However, the project reports that key successes to date have been the formation of a strong delivery partnership between Brodies and University of Strathclyde and the continued growth of the Glasgow Equality and Diversity Forum, which may have ceased to meet on a regular basis without the focus of this Big Lottery Fund project. Another reported success is the continued appetite for involvement amongst employers, despite delays to the project.

Key challenges

The key challenge to this project has been the level of delays faced in delivery. This stemmed from the project lead in Glasgow City Council (who had been instrumental in the design of the project and submitting the application for funding) having moved to a new Council department at the time of funding being confirmed by the Fund (September 2013). In their new department, it was not possible for the project lead to maintain this role. In May 2014 the Fund contacted the project to ask whether there were still plans to proceed. At this point, the project lead was required by the Council to be involved once more and to recruit a Project Manager to take the project forward. Since May 2014, the project lead has worked with Glasgow Chamber of Commerce to deliver four awareness raising events and has recently recruited a project manager.

Further Learning Opportunities

To what extent have employers played a key role in the design of the project?

Three focus groups were held with employees in the design of the project, in order to understand views about perceived and actual barriers to people from the selected protected characteristic groups getting jobs, retaining jobs, and progressing to higher positions.

Members of the Glasgow Equality and Diversity Forum were involved in a number of ways with the design and delivery of the project, such as articulating the need for an innovative approach and the need for an approach that focussed on staff training. In terms of delivery, a project representative reports that there has been a shared agreement amongst delivery partners that it is essential to work with leaders of organisations to ensure that there is commitment to the project.

Due to the early stage of the project, it is not possible to fully understand the impact of involving employers in the design and delivery of the project on outcomes.

Other learning opportunities

Because there have been no individuals yet engaged in the main strands of the project, it is not possible to draw wide conclusions on the impact of the project or what this might mean in terms of good practice for other similar projects.

Beneficiaries will be engaged with the project across the three Moving Up target groups, meaning that there is potential for the project to reflect on whether different beneficiary groups experience labour market disadvantage in different ways. This would need to be formally considered in the project monitoring and evaluation strategy, which is not yet in place.

Organisations are being engaged by the project across sectors, and there is again potential for the project to reflect on whether the industry and / or sector that beneficiary groups are employed in influences the labour market disadvantage that they experience. Again, this would need to be formally considered in the project monitoring and evaluation strategy, which is not yet in place.

The main learning point for the project to date is that, while there was a strong idea for an innovative joint project to tackle inequality and diversity, success to date has been severely hampered by delays. The reasons for delays are now being addressed and project delivery partners report a strong shared commitment to delivering the project on time.

Discussion on Research Questions and Hypotheses

There were a number of key themes found in this research. We address these under the research questions and hypotheses below.

What approaches do the Moving Up projects take to engaging and working with specific beneficiaries and what is the rationale for the approaches taken?

In figure 2 we summarise the target groups and the approaches used by different projects, and also note who the project worked with specifically (e.g., working with employees, working with line managers, or working to influence policies).

	Target Group	Approaches used:					Working with:			
		Mentoring	Coaching	Work Placements	Training	Networking	Potential employees	Employees	Line Managers	HR Policies
Positive Moves in the Workplace	BME	X	X				X	X		X
Gender Equality Works	Women	X			X	X	X	X		X
Equality Mentoring	BME	X						X	X	X
The Equality Academy	Disabled			X			X	X		X
Step Up!	Women		X		X	X	X	X	X	X
Nursing Career Opportunities	BME	X			X			X	X	
Challenging Hidden Barriers in the Workplace	All		X		X			X	X	X

Figure 2 – Target groups and approaches used by different projects

Working at multiple intervention points

All the Moving Up projects worked at more than one “*intervention point*” to address inequality. This could mean working directly with individual employees in an under-represented group, working directly with hiring managers and line managers, or working at an organisational level, for example by

improving an organisation's HR policies. This is summarised in figure 3, which illustrates the different intervention points taken by projects.



Figure 3: The different intervention points for addressing inequality in organisations

While working directly with employees affected by inequality arguably offers the best chance to have a measurable impact on individuals' progression opportunities, working to reduce the barriers to progression that exist in workplace culture or organisational structure requires a systemic approach; the Moving Up projects appear to have recognised this in their approach.

Difference in intensity and scale

Projects varied in both the intensity and the scale of impact. Most projects offered some intensive support to a few individuals, while some projects (*Gender Equality Works*, *Step Up!*, *Challenging Hidden Barriers in the Workplace*) also engaged a large number of people with a small amount of contact, for example attending one-off events.

Removing barriers versus Positive Action

Some projects (such as *Positive Moves in the Workforce* and *Equality Mentoring*) took an explicit Positive Action stance while others focussed on removing the barriers facing underrepresented groups in the workplace (*Gender Equality Works*, *Equality Academy*, *Challenging Hidden Barriers in the Workplace*). Positive Action counteracts inequality of opportunity by offering additional generic support to people in underrepresented groups; for example, leadership training might benefit any recipient, but making it available to people in an underrepresented group may redress an imbalance in leadership. By contrast, an approach focussed on removing barriers would involve first identifying the causes of the imbalance in leadership, and then offer an intervention aimed at the barrier itself. An example of this would be identifying a lack of positive role models in leadership, and organising a mentoring scheme to counteract this barrier.

Mentoring is a common approach, but means different things to different projects

Several projects offered mentoring programmes, in response to the cross-cutting barriers of a lack of supportive role models or access to informal networking opportunities. However, mentoring meant a different thing to different projects; for example, in *Gender Equality Works* and *Equality Mentoring*, mentees are paired with mentors within their own field of work, while mentees in *Positive Moves in the Workplace* were all mentored by an employee of PATH who was not necessarily in their intended field of work. Mentors in the *Nursing Career Opportunities Project* were not necessarily nurses. Mentoring programmes also differed on whether it was important for the mentor to have "lived experience" as part of the same underrepresented group as the mentee; while the *Nursing Career Opportunities Project* aims to transition to using mostly BME mentors, the *Equality Mentoring* project noted the added value of engaging non-BME mentors to the programme, as the process of training and delivering mentoring helped non-BME mentors to understand their own unconscious bias and cultural barriers, a first step towards changing workplace culture. In both cases, the use of non-BME

mentors was initially a pragmatic decision, as the demand for mentors was higher than the number of available BME volunteers.

Expectations on mentoring relationships varied even within a single project; in the *Equality Mentoring* project, one participant described their mentor as a “friend”, while another described theirs as “highly trained”.

Mentoring programme	Same field of work	Same protected group
Positive Moves in the Workplace	N	N
Gender Equality Works	Y	Y
Equality Mentoring	Y	N
Nursing Career Opportunities Project	N	Y

Figure 4 – Mentoring approaches used by different projects

In-group leadership

Projects differed on the importance they placed on whether the project itself was run by members of the target group it aimed to support. Representatives from PATH (*Positive Moves in the Workforce*) told us that key to their success in supporting BME employees was the fact that PATH is a “black-led organisation”, and that this is vital for winning trust as well as inspiring BME participants. The *Nursing Career Opportunities Project* also felt it was important that its coordinators had “lived experience”, and exercised Positive Action in recruiting two BME nurses to the coordinator posts. On the other hand, representatives from *Equality Mentoring* commented that recruiting non-BME mentors for its mentoring programme had a positive impact both for individual mentees and for the project’s institutional impact.

Innovative approaches are being used to “shake things up” and challenge entrenched workplace cultures

A number of project representatives stated that projects such as theirs have to accept a level of controversy in order to deal with inequality issues in an innovative way and “tackle the problem head on”.

One example of this was the common theme of projects expressing the need to consider and address any unconscious bias in the workplace. While the project *Challenging Hidden Barriers in the Workplace* has this as its main focus, *Gender Equality Works* has plans to deliver unconscious bias training at a later stage in the project, and another project (*Equality Mentoring*) found that this was often reported by project participants as being a significant issue, and subsequently introduced an additional element of delivery around unconscious bias.

What evaluation (or other) activity do the Moving Up projects utilise to demonstrate progress and success in meeting outcomes and achieving impact?

Different projects have taken different approaches to evaluation and monitoring, but there is significant scope for improvement in many cases, which has been detailed throughout the case studies.

The use of formative evaluation partners has been cited as helpful for ensuring that final outcomes are achieved, but where this is in place there needs to be a clear understanding amongst the project delivery team of interim progress.

We have found very limited examples of project monitoring frameworks that collect data on individuals involved in schemes and track the activities they are involved in and the partial and

complete outcomes they achieve as a result. It has therefore been very difficult to interrogate project data and provide evidence to support the key achievements cited by project representatives.

While we recognise that the Fund already prioritises learning from projects and supports grantholders in self-evaluation, we believe that there is scope for the impact of projects to be further increased by increasing the level of support on evaluation methodology. This could take the form of a guidance document offering examples of good practice in evaluation, shared with applicants at stage one. Projects with an appreciation of the importance of learning from projects are likely to have a wider impact than those who evaluate mainly in order to meet the conditions of the grant. At least two projects in Moving Up use wider evaluation frameworks that will evidence impact beyond the indicators required by the Fund.

In some cases we found that projects appeared to question the usefulness of outcome indicators set for the delivery of the project, which suggests that there could be improvements in terms of real ownership of the projects' outcome indicators. We heard that another key challenge with respect to collecting sufficient monitoring data is the issue of anonymity for participants, which needs to be carefully built into evaluation models.

What are the key challenges when working to improve outcomes for the Moving Up beneficiary groups?

Engaging Employers

Representatives from several projects commented that engaging with employers was a major challenge, both for working with employers at an institution level and for securing "buy-in" from employers for their employees to take part in individual interventions. A common reason given for this was that employers are likely to perceive equalities support in general as regulatory or critical, rather than supportive to employers.

Projects had several approaches to combat this, but the common theme was integrating employees' and employers' support. As *Equality Academy* representatives noted, introducing organisational interventions as "*part of the support package that comes with a work placement*" took the spotlight off employers, and made them more willing to engage. Linking the two also added value for both sides, as the organisation becomes more able to support a trainee on a work placement, and a trainee on work placement is able to offer an insider's view to inform the organisational development work.

Equality Academy, *Step Up!* and *Challenging Hidden Barriers in the Workplace* all noted that promoting interventions as opportunities for business development was important for winning over cautious or sceptical employers.

Another approach to securing buy-in from employers was by endorsement; *Equality Mentoring* reported that when unions were involved, employers were less likely to see the project as a "box-ticking" exercise, and *Gender Equality Works* proposed securing endorsement from industry leaders as a way to overcome difficulties in engaging employers in future.

The challenges of working with "short term loss for longer term gain"

An interesting finding from the research was the message that the very intervention of projects that aim to address inequality can cause negative impacts at first, such as BME workers being made more aware or being reminded about discrimination they experience, and therefore feeling more dissatisfied in their work. While interventions clearly need to consider mitigating risks regarding this short term negative impact, it is essential that any negative impacts are seen in the context of a longer term positive impact strategy.

Negative perceptions of “preferential support”

We heard that the issue of providing “preferential” support for the groups of people supported by Moving Up was perceived negatively in some instances, but that this could have a positive impact by encouraging discussion about unexamined aspects of workplace culture.

Challenges in delivering projects in a timely manner

Some projects have had delays in delivery, such as the *Nursing Career Opportunities Project*, which started slightly later than planned, and the *Challenging Hidden Barriers in the Workplace* project, which faced significant delays. We understand that reasons for delays in *Challenging Hidden Barriers in the Workplace* are now being addressed and project delivery partners report a strong shared commitment to delivering the project on time.

Equality Mentoring found that the timing of the Moving Up programme was not well matched with the academic year, resulting in logistical problems for the team in delivery.

Some issues with ownership and accountability for projects

We found some instances of challenges when individuals who are leading on delivering the project were not involved in the design of the project. This includes cases where the lead project delivery contact is new in post. This appears to have led to issues with full ownership and accountability for delivering projects.

Achieving sufficient engagement versus targeting “easy wins”

Some projects have found it challenging to engage with as many individuals as planned, but there was also a suggestion that some projects have worked with people who were naturally most inclined to be engaged with the programme. Making the greatest positive impact by balancing sufficiently high levels of engagement and sufficient targeting of those less inclined to engage (who projects might hope to influence to a greater extent) is a clear challenge for projects.

Hypotheses

This review investigated seven projects at different stages in their delivery, including projects at an early stage of delivery and projects nearing completion; some projects have performed extensive self-evaluation activity, some project have not yet delivered anything to evaluate . A fuller assessment of “what works”, including addressing the research hypotheses, will be possible at a later date when more projects are close to completion. Below we report on the evidence towards the hypotheses that we have been able to gather through this research.

In figure 5, we show the timeline of Moving Up projects, with the black box area showing the timing of this research within projects’ timelines.

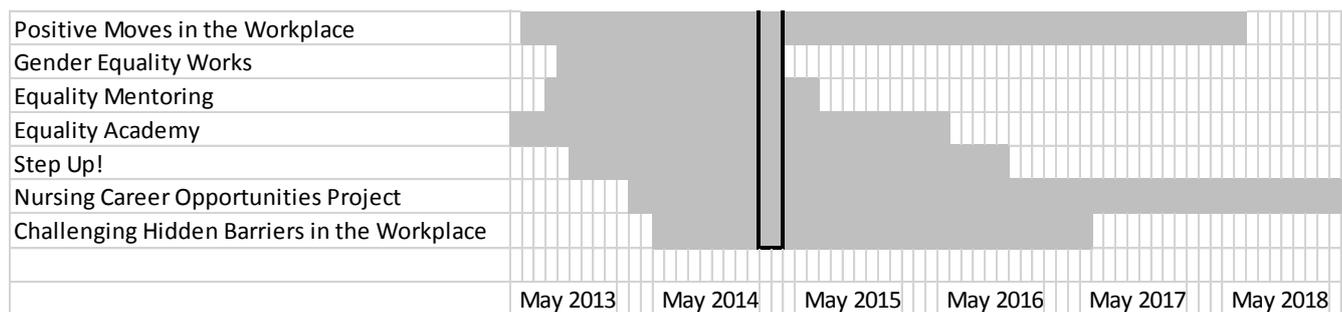


Figure 5 – Timeline of Moving Up project delivery and this evaluation (black box)

Hypothesis 1: Support designed specifically for discrete groups disadvantaged in the labour market is an effective way of achieving improved outcomes.

All projects bar *Challenging Hidden Barriers in the Workplace* have targeted a single group in the Moving Up characteristic groups (i.e., one of gender, race or disability) and *Challenging Hidden Barriers in the Workplace*, which is working with all three groups, is at such an early stage in delivery that it is not possible to conclude whether Moving Up projects that focussed on one of the three groups have made more impact than the project that worked with more than one of the three groups.

Apart from *Challenging Hidden Barriers in the Workplace*, all projects had a specific focus, not just on one of the three Moving Up groups but also in a specific discrete group within this (e.g., women in the renewable energy sector).

The project closest to completion, which therefore offers the best insight into the effect on outcomes of focussing on a discrete group of individuals, is *Gender Equality Works*. *Gender Equality Works* provided arguments based on improved economic outcomes in their rationale for focussing on women in the renewables industry. For example, it was proposed that this would be an effective way of addressing the overall gender pay gap in Scotland because the sector has been identified as a growth sector for Scotland. In delivery, the project cited a strong evidence base of focussing on the specific type of barriers facing women in the renewable energy sector and in SMEs as a key strength in helping achieve outcomes. The anonymous monitoring means that it is not possible to track participants’ journeys and progress, and therefore it is difficult to fully assess outcomes and the extent to which these were driven by targeting a discrete group. However, in evaluations on mentee progress, two of eight mentees interviewed had progressed in work since having a mentor (which goes beyond the outcome of increasing the *capacity* to progress) and there is significant demand for

further mentoring. This could suggest that the targeted mentor support for this discrete group has had a positive impact on outcomes – it is difficult to draw complete conclusions on this.

Perhaps the most notable theme related to tackling inequality by targeting discrete groups of individuals is that of underrepresentation. By targeting a single underrepresented group, projects often described scenarios in which they were engaging people who might be isolated in the workplace, such as *Positive Moves in the Workplace* that referenced supporting people who might be “the only BME person in the workforce”. Projects described Positive Action approaches to achieving positive outcomes by working with such underrepresented groups.

Project representatives of the *Equality Academy* cited the importance of strong relationships with interns, trainees and organisations – this element of relationship building could be more achievable when working with a discrete group of individuals.

By targeting particular groups, some projects hoped to have an impact by addressing gaps in other provision. An example of this was the gap identified in *Equality Mentoring* regarding race “dropping off the agenda” in Higher Education because of a focus on gender equality in the Athena SWAN Charter,. Mentees in this project were impressed by the BME-specific support and, although limited by the small sample size in an interim evaluation, there is some evidence of a small positive impact on mentees around their management environment. The final evaluation of this project – due imminently – will allow the Fund to reflect further on outcomes achieved.

Hypothesis 2: Different beneficiary groups experience labour market disadvantage in different ways.

Please refer to figure 6 below for information on the different labour market disadvantages reported for different beneficiary groups and different sectors. This figure does not purport to be a comprehensive assessment of every labour market barrier faced by these groups, but rather reflects the disadvantages reported during the research.

There is only one project (*Challenging Hidden Barriers in the Workplace*) which is cross-cutting with respect to the three Moving Up target groups. This project offers real opportunity for learning about the different ways that different groups experience labour market disadvantage, but is at too early a stage for any conclusions to be made on this.

Although there were some specific differences in the ways that different beneficiary groups experience labour market disadvantages, there were also some common themes. One of the common disadvantages amongst different beneficiary groups (in terms of the Moving Up protected characteristic groups) was unconscious bias, which was referenced by projects working with BME people, disabled people, and women. For example, *Positive Moves in the Workplace* cited research by the Coalition for Racial Equality and Rights, in which identical CVs³² with different names were sent to employers; employers were found to be less likely to respond to names associated with BME origins. The *Equality Academy*, which works with disabled people, referenced discrimination in informal interview processes resultant from unconscious bias, in terms of interviewers’ expectations of what competence looks or sounds like.

Another commonly reported disadvantage was the existence of a pay gap for women, disabled people and people from BME communities.

³² Curricula Vitae

A further common disadvantage was the need for role models, which was reported by female participants at focus groups in the WiRES workstream of *Gender Equality Works* and again reported as being important in the BME-focussed *Nursing Career Opportunities Project*.

Project representatives collectively highlighted that the groups supported by Moving Up are under-represented in the workforce. Projects focussed on supporting people from BME communities and disabled people also emphasised under-representation at “higher” levels, such as management levels.

As well as commonly reported labour market disadvantages, there were a number of disadvantages which were emphasised for particular beneficiary groups. For example, labour market disadvantages reported for people from BME communities were associated with religious and faith issues, discrimination around language and accents, overseas qualifications not being recognised and employers’ failure to deal with any staff issues before they escalate, perhaps due to fear of being perceived as discriminating.

For women, there were specific issues around inflexible working practices (e.g., working hours, childcare availability).

For disabled people, specific barriers included physical environment barriers, such as access to transport, steps and bathroom facilities), as well as issues with employers being ignorant of support and anxieties over the cost or difficulty of making reasonable adjustments to a job role.

Hypothesis 3: The industry and /or sector that beneficiary groups are employed in influences the labour market disadvantage they experience.

Please refer to figure 6 below for information on the different labour market disadvantages reported for different beneficiary groups and different sectors. This figure does not purport to be a comprehensive assessment of every labour market barrier faced by these groups, but rather reflects the disadvantages reported during the research.

This research has revealed support for the above hypothesis, but there were also a number of examples where types of labour market disadvantage cut across sectors.

Both projects that supported women in the workplace focussed on women in engineering, renewables or manufacturing, with strong evidence base that women are strongly underrepresented in this sector. Furthermore, issues around under-representation of BME employees at “higher” levels were cited in both Further/Higher Education and nursing in the health sector.

Unconscious bias also appears to be cross-cutting, with this being reported in housing sectors and in Further/Higher Education.

There was some evidence that the industry / sector of employment has an influence on labour market disadvantage. The sector of employment in terms of business size has been linked to the type of discrimination faced by employees. As an example, *Gender Equality Works* focusses on working with small and medium-sized enterprises (SMEs), with arguments that SMEs are less likely to have strong equalities practice in place, and are less likely to feel able to invest human resources time to addressing this issue because of competing demands and limitations of scale.

The sector of employment (public, private, or third sector) was also cited as being important – in providing rationale for *Gender Equality Works* approach, it was suggested that private sector

businesses were generally less willing to talk about addressing gender equality for fear of litigation or competition.

Again, the main project which will work across sectors is *Challenging Hidden Barriers in the Workplace* – with this project still in its infancy, there is a real opportunity for this hypothesis to be tested out by including this as part of the projects’ new evaluation framework.

	BME	BME in Housing	BME in FE/HE	BME Nurses	Women	Women in renewable energy/ engineering/ manufacturing	Disabled People	SMEs	Private sector (businesses)
Labour Market Disadvantage									
Underrepresentation in the workplace (leading to e.g., isolation, harassment, lack of confidence)		X	X	X		X	X		
Pay Gap	X				X		X		
Underrepresentation at "higher" levels in the workplace			X	X			X		
Cultural Barriers		X		X	X				
Unconscious bias (e.g., in recruitment, workplace culture)		X	X			X	X		
Lack of role models				X		X			
Heightened scrutiny / being singled out				X		X			
Internalised barriers to progression			X	X					
Higher qualifications and experience standards required of BME employees for the same roles	X								
Religious and faith issues		X							
Discrimination Language / accents where language is not the person’s first language		X							
Overseas qualifications not recognised		X							
Employers failure to deal with issues before they escalate, perhaps due to fear of discrimination				X					
Inflexible working practices (working hours, childcare availability)						X			
Lack of access to informal networking opportunities						X			
Faster drop out (from qualifications to work)						X			
Social exclusion						X			
A higher bar for performance						X			
Physical environment barriers (eg, access to transport, steps, stairways, bathroom facilities)							X		
Employer ignorance of available support							X		
Employers' anxieties over cost/difficulty of making reasonable adjustments to a job role							X		
Difficulties talking about disability, in part because of the stigma of disability							X		
Barriers related to social reactions to difference							X		
Practical barriers - lack of protective clothing in women's sizes								X	
More likely to have opaque progression routes								X	
Employer lacking HR knowledge and confidence								X	
Practical barriers to flexible working								X	
Employers less likely to have strong equalities practice in place, and less able to invest resource to do so								X	
Employers less willing to talk about inequality for fear of litigation or competition									X

Figure 6 – The different labour market disadvantages faced by different beneficiary groups and in different sectors

Hypothesis #4: Asking employers to play a key role in the design and delivery of the Moving Up projects will result in improved outcomes.

Generally there was strong support for the above hypothesis in the responses given by project representatives, with many projects citing the importance of employer “buy-in” to the project and no projects indicating that employer engagement was not important. *Step Up!’s* Career Enhancement Programme has been a real success, and project representatives emphasised the importance of employer buy-in, which was achieved by outlining the business case for involvement in a leaflet for employers and employees.

In practice, a number of projects work with both employers and employees in the same organisations in a bid to making systemic change in an organisation by influencing different parts of the system (as noted above). *Systems theory* recognises organisations as complex hierarchies of interacting parts which all affect each other. A holistic or *systems theory* perspective would suggest that interventions at multiple levels are more likely to have a lasting impact on organisational culture. However, a multiple intervention approach also makes it challenging to attribute the impact of each intervention on the system.

In Gender Equality Works, it was found that having corporate members literally “buy in” to the work adds to the potential sustainability of the work. However, take-up amongst employers of the employer “Think Business Think Equality” tool in this project was lower than hoped and one of the major challenges for the project. In order for employers to make a significant impact, the project team reflected that endorsement from organisations with a strong and trusted presence in the SME community would be needed.

A number of projects included employers as direct beneficiaries of the work (see figure 2), while others engaged employers to greater or lesser extents in order that work with employees would be more successful. It would appear that a certain minimum level of employer engagement is required for projects to be successful. In *Positive Moves in the Workplace*, employers have been involved in the delivery of the project to the extent that they have released staff to attend coaching sessions and publicising information about the project to staff. Employer involvement even in this sense is critical in that it allows employees to engage in the programme without giving up personal time.

A success reported by the *Equality Academy's* was the wider impact that trainees' progress has had on society – working with organisations alongside offering traineeships is an opportunity to maximise this wider social impact. Project representatives of *Equality Academy* found that employers taking ownership of the process of advertising and recruitment was also very important for the success of the traineeship.

Finally, an interesting theme within this hypothesis is that better outcomes might be seen by not engaging employers for the sake of it (i.e., “10 employers engaged”) but rather the need to focus on employers who are not as naturally inclined to be involved in such a programme – i.e., getting away from the “easy wins”. However, with employer engagement proving difficult for a number of the projects this will clearly be very challenging.

Appendix 1: Outcome Indicator Tables

Project 1: Positive Moves in the Workplace

Outcome indicators	Time-scale	Progress to date
BME programme participants who work or aspire to work in housing or related sectors demonstrate improved leadership and management ability and improved career aspirations.		
100 per cent of the total number of participants (20 per year- 10 in each strand) understand career progression opportunities in housing and related sectors.	Per year	28 people in total engaged the mentoring / aftercare strand in years 1 and 2 (14 in year 1, 16 in year 2, 2 overlap); 19 people in total engaged in the coaching / leadership strand in years 1 and 2. It is not possible to assess from available monitoring data what proportion of all participants understood career progression opportunities. 100% of the participants on the coaching strand in the first year stated that the coaching helped them to progress their career plans. ³⁴
75 per cent of the total number of participants demonstrate improved leadership skills and knowledge (15 per year)	Per year	Project representatives assert that 100% of participants in the Coaching and Aftercare strands have shown an increase in confidence and leadership. ³³
75 per cent of the total number of participants demonstrate increased confidence in and out of the workplace (15 per year)	Per year	See above: Project representatives state that 100% of participants so far have shown an increase in confidence and leadership. 100% of the participants on the coaching strand in year 1 reported improved confidence. ³⁴
75 per cent of the total number of participants identify barriers to progression in employment. (15 per year)	Per year	100% of the participants on the coaching strand in year 1 identified barriers to career progression, and 98% stated that the coaching helped them to overcome barriers to career progression ³⁴
RSL/Local Authority Housing Departments improve their knowledge and skills around Positive Action and equality in the workplace.		
25 housing associations developed Equality / Positive Action action plans	End of project	10 organisations were supported during the first two years of Positive Moves, 5 per year. Work with the 5 organisations supported in the first year has included developing action plans for 3 organisations and reviewing action plans for 1 organisation. 2 organisations also received race equality training for staff.
25 housing associations reviewed their Equality / Positive Action policies	End of project	Work with the 5 organisations supported in the first year has included reviewing E&D policies for 2 organisations.
25 housing associations updated their Equality / Positive Action policies in the light of current	End of project	

³³ Pers comm, project representative

³⁴ Leadership / Coaching strand first year progress report

legislation and good practice.		
The wider housing sector understands the employment challenges faced by BME communities.		
Annual internal learning event is held to disseminate learning from the project.	Annual	So far, two internal learning events have been held.
Annual survey is held to assess awareness of BME/Equality issues.	Annual	York Consulting carried out a national survey of housing organisations, surveying 27 organisations on their equality policies, attitudes and issues.
Regular dissemination is carried out via website/ newsletters/ leaflets.	Regular	PATH assert that regular dissemination via website, newsletters and leaflets is continuing.
Two conferences are held to disseminate learning from the project.	End of project	So far, one external conference has been held, with 70 attendees.

Project 2: Gender Equality Works

Outcome indicators	Timescale	Progress to date
250 women in the renewables sector or who are qualified to work in the sector and wish to do so, have increased capacity to progress within the renewables sector		
80% of women have identified a planned progression route by March 2015	March 2015	To be confirmed
80% of women report that they have more career planning skills by March 2015	March 2015	To be confirmed
90% of women report that they have developed their networks in the sector by March 2015	March 2015	At the first five events, 99% of women surveyed reported that they had developed their networks.
75% of women report having more technical skills or knowledge	March 2015	At the first three site visits and the first 5 events, 86% of women reported having more technical or skills knowledge.
Private sector SMEs have a self-assessment tool that enables them to identify ways of equality-proofing their employment practice		
15 private sector companies have made changes to their employment policies and practice or are in the process of making change.	March 2015	21 organisations have registered to use the tool, of whom 9 have completed at least one of the five sections. Three users have completed a survey about the tool. Survey responses were therefore too low to establish the extent of action taken as a result of the tool.
18 private sector companies have identified improvements to employment policies and practice	March 2015	
The tool has been piloted with 20 SMEs.	March 2015	
Women working for private sector companies who engage with the “Think business, think quality” pilot benefit from gender-sensitive employment practices		
<i>As above</i>	March 2015	Survey responses were too low to establish the extent of impacts as a result of the tool.
Stakeholders providing business support and making policy have better information, tools, and evidence for interventions on equalities		
Data disseminated to 150 stakeholders working on renewables through Close the Gap	March 2015	Dissemination events and publications are planned for March 2015.
Data disseminated to 250 stakeholders working on skills, employment and enterprise through Close the Gap	March 2015	

Project 3: Equality Mentoring

Outcome indicators	Timescale	Progress to date
<i>BME workers in the further and higher education sector in Scotland improve their job prospects by becoming more confident in accessing opportunities in the workplace.</i>		
40 per cent of participants apply for promoted posts by February 2015	End of project	This will be reported in the final Centrifuge evaluation report, expected end of March 2015. The interim report in Dec 2015 declared that there is "Some evidence" of achievement.
50 per cent of participants become more active in trade union branch activities by February 2015	End of project	This will be reported in the final Centrifuge evaluation report, expected end of March 2015. The interim report in Dec 2015 declared that there is "Some evidence" of achievement. The baseline study showed a lack of engagement, which led to the project addressing this in partnership with union branches and national offices.
75 per cent of participants engage in further workplace learning and workplace education by February 2015	End of project	This has not been measured yet. The interim report in Dec 2015 declared that there is "Some evidence" of achievement.
80 per cent of participants demonstrate improved self-confidence and wellbeing and feel more valued in the workplace by February 2015	End of project	This has not been measured yet. The interim report in Dec 2015 declared that there is "Some evidence" of achievement.
<i>Further and higher education sector institutions participating in the project are better equipped to address the challenges faced by BME workers and offer better support to them.</i>		
10 participating institutions demonstrate better understanding of the issues faced by BME staff by February 2015	End of project	The interim report in Dec 2015 declared that there is "Some limited evidence". First year monitoring stated that six institutions have participated with the project, and the project reports that these have "demonstrated increased understanding through their equality and diversity, organisational development, management and union rep representatives". Other non-participating institutions have also met with OWER to discuss the issues.
4 participating institutions appoint race equality champions by February 2015	End of project	The interim report in Dec 2015 declared that there is "no evidence to date".

5 participating institutions and their union branches demonstrate improved policy and practice on race equality issues by February 2015	End of project	The interim report in Dec 2015 declared that there is “no evidence to date”.
5 participating institutions demonstrate more effective partnership working with trade unions on race equality issues by February 2015	End of project	The interim report in Dec 2015 declared that there is “no evidence to date”.
<i>The further and higher education sector in Scotland has an improved understanding of the issues of BME workers within their organisations.</i>		
Organise annual learning event with steering group and project team to review progress and reflect on key messages and good practice from project for wider dissemination.	End of project	The interim report in Dec 2015 declared that there is “some evidence”. <i>First year monitoring stated that, “rather than one learning event, the progress and key messages have been reviewed internally through quarterly steering group meetings and externally through small joint meetings of equality and diversity, organisational development, SMT and union staff at the participating institutions”.</i>
Organise interim and final conference with education sector and wider stakeholders to highlight successes, disseminate key findings and provide recommendations for action/inform future race equality policy and practice.	End of project	The interim report in Dec 2015 declared that achievement on this is “to be confirmed”. <i>First year monitoring stated that “preparation work has started, event scheduled for early 2015”.</i>
Promote and disseminate findings to further and higher education institutions.	End of project	The interim report in Dec 2015 declared that there is “some evidence” of achievement. <i>First year monitoring stated that “preparation work has started, dissemination scheduled for early 2015.”</i>

Project 4: Equality Academy

Outcome indicators	Timescale	Progress to date
<p>1) Employers will report an increase in knowledge and understanding of statutory duties resulting in improvements in their practice in relation to disabled people</p>		
<p>20 employers per year will give feedback to indicate greater awareness among staff of how to address institutionalised discrimination.</p>	<p>Y1</p>	<p>Five organisations have received organisational development services, including policy audit and training. This included two organisations who hosted a placement and three who did not. 14 organisations in total have received some organisational support, including 11 placement providers and 3 additional organisations as above.</p>
<p>120 employers over 3 years will be given information promoting equality matters</p>	<p>3 years</p>	<p>Equality Academy report that they have produced two newsletters that have been distributed to over 650 recipients across all sectors in Scotland. The project has also produced a series of marketing videos.</p>
<p>120 employers over 3 years will report an increased awareness of equality matters</p>	<p>3 years</p>	<p>Equality Academy's monitoring returns indicate that it received feedback from 25 organisations who have expressed improved awareness of discrimination issues.</p> <p>In total, the Equality Academy has engaged on some level with 143 organisations, including both partnership working and service delivery.</p>
<p>2) Wider dissemination of The Equality Academy experience will result in changed attitudes and practice beyond its beneficiaries</p>		
<p>20 disabled people per year will report changes in the way they engage with employers and potential employers</p>	<p>Y1</p>	<p>Since May 2013, 7 of the 12 trainees and interns who have been surveyed have shown an increase in how confident they feel about accessing future employment on a scale from 1-10.</p>
<p>20 employers over 3 years will report increased understanding of disability issues and practical reductions in barriers to disabled people in the workplace</p>	<p>3 years</p>	
<p>20 employers per annum will report changes in their practices in relation to disabled people</p>	<p>Y1</p>	
<p>3) Through the Graduate Traineeship programme, disabled people will gain employment experience with practical knowledge and skills, increasing their chances of achieving long term employment.</p>		

12 disabled people will gain further professional employment following their traineeship	Y1	4 of the 7 trainees who have completed a traineeship so far have gained professional employment; a further 2 traineeship graduates are unable to look for work due to ill health. All 3 of the 3 interns who have completed an internship so far have gained professional employment.
Over 3 years, through provision of graduate traineeships, 15 disabled people will report a clearer understanding of their own requirements, more able to discuss their access requirements and the support available for them, with employers.	3 years	9 Trainees have reported that they have a clearer understanding of their access requirements and as a result are more confident when raising and addressing such issues with employers.
15 disabled people will believe themselves to be in a better position to achieve long-term employment.	Y1	Since May 2013, 7 of the 17 people who have done part of a traineeship or internship with Equality Academy have shown an increase in how confident they feel about accessing future employment on a scale from 1-10. 2 of the 17 interns or trainees have not started recording their confidence yet.
<i>4) Through the internship programme, disabled people will gain employment experience with practical knowledge and skills, increasing their chances of achieving long term employment.</i>		
45 disabled people will believe themselves to be in a better position to achieve long-term employment.	End of project	6 interns have started an internship so far, and 3 of these have finished their internship and gained professional employment. Since May 2013, 7 of the 17 people who have done part of a traineeship or internship with Equality Academy have shown an increase in how confident they feel about accessing future employment on a scale from 1-10. 2 of the 17 interns or trainees have not started recording their confidence yet.
45 disabled people will report a clearer understanding of their own access requirements, more able to discuss their access requirements and the support available to them, with employers.	End of project	2 interns have reported that they have a clearer understanding of their access requirements and as a result are more confident when raising and addressing such issues with employers.

Project 5: Step Up!

Outcome indicators	Timescale	Progress to date
<i>Women are better prepared for progress in the SET sectors.</i>		
40 women (per year) have increased information and awareness of career development opportunities (via events)	Per year	In year 1 and the first few months of year 2, between 120 and 291 women attended a Step Up! event or workshop.
40 women have increased skills and experience to facilitate career advancement		<p>15 women attended the Career Enhancement Programme and 100% of respondents agreed or strongly agreed that the course had helped them to analyse their skills and strengths</p> <p>20 women attended the “Sticky Floors and Glass ceilings” workshop and 92% of respondents of strongly agreed or agreed that the workshop had helped them to develop an action plan to progress in their career.</p>
40 women have increased motivation and confidence to advance career		<p>15 women attended the Career Enhancement Programme, and 100% of respondents to the survey agreed or strongly agreed that the course had helped them to clarify goals for career development and progression</p> <p>12 staff attended a “<i>responding to change</i>” workshop at GE Caledonian, and 100% of respondents to the survey reported that the workshop had increased their confidence to deal with change.</p>
15 participants applied for a new post in years 2 and 3	In years 2 and 3	
<i>Female STEM students and graduates are better prepared to enter into employment in the SET sectors.</i>		
As above		
15 participants applied for work experience placements in years 2 and 3	In years 2 and 3	
<i>Qualified women are better prepared to return to their careers in the SET sectors</i>		
10 women (per year) have increased information and awareness of career development opportunities (via events)	Per year	Step Up! have held one returners’ relaunch event so far which had 10 attendees. Feedback was not available for this event.
10 women have increased skills and experience to facilitate a return to employment after a career break	Per year	

10 women have increased motivation and confidence to return to employment	Per year	
<i>Employers in the SET sectors are better informed of the benefits of a diverse workforce and committed to developing good practice in gender equality.</i>		
25 employers actively engaging with project per year in years 2 and 3	Per year	12 employers attended the first employers' seminar in year 2. 100% of respondents to the feedback survey reported that they had identified key actions they could take to grow the talent pipeline.
250 employers directly engaging with project information and materials per year	Per year	
10 employers participating in Employers Steering Group per year in years 2 and 3	In years 2 and 3	
10 employers offering work experience to female STEM students per year in years 2 and 3	In years 2 and 3	

Project 6: Nursing Career Opportunities Project

Outcome indicators	Timescale	Progress to date
250 nurses from BME backgrounds will gain leadership skills, improved self awareness and increased confidence at work from the Leading Better Care tailored leadership development programme.		
84 BME nurses will report that they feel more confident as leaders as a result of participating in the LBC programme	Y2	<p>Progress in Year 1:</p> <p>In cohort 1 (starting Jan 2015), 10 nurses registered and 8 attended the first study day.</p> <p>In cohort 2 (starting March 2015), 8 nurses have registered. Overall, 40-50 nurses have talked to the project team about the programme.</p> <p>Further cohorts will then start at two-monthly intervals.</p>
144 BME nurses will report that they feel more confident as leaders as a result of participating in the LBC programme	Y3	
204 BME nurses will report that they feel more confident as leaders as a result of participating in the LBC programme	Y4	
250 BME nurses will report that they feel more confident as leaders as a result of participating in the LBC programme	Y5	
At least 25 BME nurses will attain promotions into nursing management pay bands (AFC Band 6+)		
At least 10 BME nurses will attain promotions into nursing management pay bands	Y3	<p>Progress in Year 1:</p> <p>Three nurses have obtained promotions into nursing management pay bands³⁵. Note that these are not nurses who have been through the extended LBC programme (Cohort 1 is expected to finish in January 2016). Two of these nurses are the lead facilitators employed to facilitate the programme.</p>
At least 25 BME nurses will ...	Y5	
84 staff (at least 50% of whom will be from BME backgrounds) will report being more knowledgeable, more confident and more effective as mentors of minority ethnic colleagues.		
48 staff will report improved knowledge, confidence and effectiveness in supporting and mentoring BME colleagues, after	Y2	<p>Progress in Year 1:</p> <p>25 people have expressed an interest in mentoring³⁶, and 12 have registered to take part in mentor training³⁷.</p>

³⁵ Project monitoring form, January 2015

³⁶ Pers. comm. project representatives

³⁷ Project monitoring form, January 2015

taking part in the mentor training		There is a plan for completers of the extended LBC programme to then become mentors – so far, a mentorship training programme has been designed with Cohort 1 LBC members, and these will begin the programme in April 2015. Cohort 2 members will begin the programme in June 2015 ³⁸ .
60 staff will ...	Y3	
72 staff will ...	Y4	
84 staff will ...	Y5	
120 Nurse managers who line manage BME nurses will benefit from additional coaching, support and training to help them support the nurse's development.		
55 nurse managers will report improved confidence and competence in line managing and supporting the development of BME nurses in their multi-racial teams	Y2	One day training courses have been scheduled in April 2015 and June 2015 and around October 2015, with the target of 14 participants in each. No managers have yet started on the coaching and training programme ³⁹ .
85 nurse managers will ...	Y3	
105 nurse managers will ...	Y4	
120 nurse managers will ...	Y5	

³⁸ Project monitoring form, January 2015

³⁹ Pers comm project representatives

Project 7: Challenging Hidden Barriers in the Workplace

Outcome indicators	Timescale	Progress to date
<i>By minimising unconscious bias in the workplace, participating organisations will create more inclusive working environments</i>		
50 participating organisations will undertake a diversity audit and create a diversity action plan	October 13 - April 16	
50 organisations will implement the diversity action plan to make their organisations a more diverse and inclusive workplace	October 13 - April 16	
50 organisations will show improved opportunities for progression to target beneficiary groups	October 13 - April 16	
<i>Women, disabled people and people from minority ethnic communities will be better prepared for (re)entering and progressing in appropriate employment</i>		
100 individuals identify barriers to (re) entering or progressing in the workplace.	August 13 - April 16	
100 individuals have increased confidence through participating in bespoke interventions.	August 13 - April 16	
100 individuals develop a career action plan	August 13 - April 16	
60 individuals gain new skills by by taking part in group training sessions	Jan 14 - April 13	
<i>Employers and wider stakeholders will have increased awareness of the negative impact of unconscious bias in the workplace and how to address this.</i>		
350+ individuals will have increased awareness of models to assist in addressing unconscious bias in the workplace	Dec 13 - April 16	120 – 130 ⁴⁰ present at awareness raising events
350+ individuals will have access to materials/tools that assist in developing a diverse and inclusive workplace	Dec 13 - April 16	

⁴⁰ Pers. comm. Project representative