Review of the WERS 2004 (WERS5)

Worker Representative Questionnaire (WRQ)

January 2010

Introduction

The Worker Representative Questionnaire (WRQ)[1] has been part of WERS since inception in 1980 but has taken a number of different forms. Initially, up to two union representatives (one manual and non-manual) were interviewed from the one workplace. In 1998 (WERS4), the questionnaire was extended to non-union representatives, but such representatives were only interviewed if the workplace had no union representatives. In 2004 (WERS5), union and non-union representatives were given an equal chance of selection, such that up to two representatives (one union and one non-union) were interviewed in each workplace.

The main objectives of collecting information from worker representatives, is to provide:

1. A view of employment relations from the worker representative's perspective (contrasting with the manager's perspective and that of employees in general). Thus, recognising the worker representative's unique position within the employment relations system that operates at the workplace (as an agent of employees).
2. An insight into the role of worker representatives.
3. A means of comparing the activities and experiences of different types of representatives (by comparing union and non-union representatives' responses on 1 and 2). We therefore learn something about how managers interact with different types of representatives, and the comparative efficacy of different channels of representation.

The key areas covered by the WERS5 WRQ are:

- worker rep characteristics – demographics, activities, organisation;
- worker representation – structure and recruitment;
- consultation and Communication;
- negotiation;
- workplace change;
- disputes and grievances; and
- attitudes towards management.

This document proposes substantial changes to the WERS6 WRQ compared to the WERS5 instrument. There are tighter budget constraints compared to WERS5 that require measures to reduce fieldwork costs. The face-to-face interviews conducted for the MQ and WRQ account for a large share of these costs and changing the method to a telephone interview has the potential to significantly reduce these costs. This is an unfeasible approach to the MQ which is proposed to be 90 minutes in length. However, it is proposed that the WRQ could be reduced to a 20-minute telephone interview. Table 1 shows that the length of the worker representative survey has remained fairly

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[1] Also referred to as the Employee Representative Questionnaire (ERQ)

consistent at around an average of 45 minutes. To reduce the survey by 25 minutes, substantial changes will need to be made.

Table 1: Average duration of worker representative survey 1998 & 2004, minutes

	2004		1998	
	Mean	*Median*	*Mean*	*Median*
Trade union representative	52	45	47	45
Non-trade union representative	43	40		

Changing the method from face-to-face to telephone interviewing will mean that some questions need to be modified, such as reducing long lists that have relied on show cards. Many of these refinements will be made in later stages of questionnaire development.

Principles of review

In reviewing the WRQ there have been three main principles guiding proposals to remove or modify existing questions. These are:

1. Reduce duplication of data items between MQ and WRQ.
2. Retain items that cover priority areas and address the main objective of the survey, which is to understand the role, activities and perspective of the worker representative. Priority areas include representation at the workplace; consultation and negotiation; collective and individual disputes; work in a recession, in particular, workplace change and redundancy; and attitudes toward management.
3. Adapting the face-to-face questionnaire to a format more suitable to a telephone interview. Although the paper does not go into these details, modifications have been made to questions that involve long lists or show cards. Where these questions have been retained, the format of the question is likely to change.

This paper takes account of the changes proposed for the MQ and have suggested similar changes where relevant. An example of this is limiting the amount of occupational data collected. The following section provides a summary of each of the sections of the WERS5 WRQ and the proposed changes. A detailed list of all WERS5 WRQ data items along with proposed changes is provided in Appendix A. Currently, there are 194 questions in the WERS5 questionnaire. In this consultation paper there are 6 proposed additions and 66 proposed deletions, resulting in a total of 134 questions for the proposed WERS6 WRQ.

It must be emphasised that these suggested revisions to the WRQ are a work in progress, and it is only with further testing and piloting that will we have a better understanding of the duration, and issues associated with changing the method from face-to-face to telephone. This paper highlights areas for removing questions. However, it is important that during the consulation stakeholders highlight the areas of the WRQ they consider vital to retain (even if they have not been identified for removal)..

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Summary of Proposals

The following is a summary of the proposed changes to the WRQ. Appendix Table 1 lists all the data items from the WRQ, a brief summary of the question, the routing that applies (i.e. who answers the question) and the proposed change (i.e. delete, modify or move). It is advised that the summary is read in conjunction with either this table or a copy of the WERS5 questionnaire.

Section A: Background Information

This first section of the questionnaire covers background information of the representative and, if applicable, the union they represent, and their activities as a representative.

Suggestions for deletion include the two open-ended questions about why they are not the most senior representative at the workplace [WAUREPCH, WAWRECH]. The trade union the non-union rep belongs to [WOTHRUN/ WUNICOD2] is considered not to be an essential data item. It is also proposed another official position within the Union [WAWREPOF] is deleted.

It is proposed that the WAHOURS remains and is modified to explicitly include representative work. The number of hours spent on representative activities [WAHRWRK] could be moved to follow the question on general work hours. As a result, whether the representative is full-time [WAFULLTI] can be deleted and instead derived from these two data items. It is also suggested that the respondent is encouraged to give an average estimate and the option of providing hours in a band [WAHRDK] be deleted. A possible addition to the questionnaire is whether the representative role is on-going or for a fixed period of time. This could provide some insight into how unions are dealing with workplace change during the recession.

Further modifications include changing name of union [WUNION] to ask whether the union rep is the representative of the largest union at the workplace - possibly inserting the name of this union from the MQ. The representative's occupation should be collected by asking them the standard occupation questions (i.e. job title, job tasks and managerial responsibilities) rather than asking reps to look at a show card and select the code themselves. The issues that the rep spends time on [WAPROTW] and the most important issue [WAPROTIM] could be replaced with one question on the three activities they spend most of their time on. A possible addition is how many union learning reps there are in the workplace. The question on Union Learning representatives is proposed to be removed from the MQ. It is felt that this question is best asked of the senior union representative and that it is useful to examine the prevalence of these types of reps in union workplaces. The new question could be a filter to whether the union rep is one themselves [WAULR].

Sections B and C: Structure of Representation at the Workplace: Union and Non-Union Representatives

Sections B and C have been reviewed simultaneously as they cover similar territory in that they determine how representation is structured in the workplace, including dealings with managers and other worker reps, whether regular meetings are held and the presence of consultation committees. However, separate questions are asked of union representatives, non-union representatives on JCCs and stand-alone non-union representatives, with some further questions for non-union representatives as a group.

1. Streamlining Sections B and C

It is proposed that Sections B and C are restructured and harmonised so that the similar questions are asked of all representatives, with some question stem modification depending on whether the respondent is a union or non-union rep. This section should ask all representatives about:
- method of election/selection;
- whether other reps are present at the workplace;
- if other reps present are they (where relevant): your union, another union; an employee rep;
- member of the main consultative committee identified in MQ;
- if no, member of another consultative committee;
- management's approach to consultative committee;
- provision of information for consultative committee;
- other contact with management; and
- if yes, whether for collective or individual issues.

Specific questions asked of union reps will be the number of union members at the workplace [WBPROPME/WBPROPPC] and change in proportion of members [WBRECHAN].

2. Question Deletions

The proposal above leads to the following deletions:
- reasons for the decrease or increase in union members [WBWHYDO, WBWHYUP];
- occupational groups represented [WBSOCME/WCSOCME];
- whether the union represents non-union members [WBREPNUN] or members of other unions [WBREPOTH];
- the proportion of women and part-time employees represented [WBPROPFE/WCPROPFE; WBPROPPA/WCPROPPA];
- questions asking reps to rate their relationship with other reps should be deleted as it is difficult to generalise [WBUNREL/WBEEREL/ WCURELA/WCURELB];
- the number of representatives at the workplace [WBREPNUM, WCNUNUM];
- meetings with other reps where management are not present [WBJTMEET, WBNUMEET, WCUMEET, WCUMEETB];
- frequency of meetings with management [WBMAOFT, WCNUOFT];
- meetings attended by union reps [WCUATT];
- provision of information for meetings [WBMAINFO];

- Issues discussed at consultative committees [WBCOMB];
- the number of non-union representatives on the JCC [WCJCCNUM];
- frequency of JCC meetings [WCJCCOFT];
- union reps member of JCC [WCUSIT];
- the person normally approached by the representative to discuss a matter [WBWHOMAP, WCWHOMAP] as this will often be self-explanatory depending on the size of the workplace and the HR structure. If it is kept, the multiple response option should be removed as the question refers to 'normal' practices – suggesting some generalisation is allowed; and
- the number of employees represented by the non-union rep [WCPROPME, WCPROPPC].

Other items for proposed suspension are those asked of JCC reps only: the level of influence of employees and reps [WCREPINF] and whether non-union reps are able to block managerial initiatives [WCREPBLO]. These questions are not consistent with the questions asked of other representatives.

3. Question Modifications

It is important that for time-savings and, in particular for telephone interviews, that the list of issues discussed at meetings with management and JCCs be reduced [WBCOMB; WCCOMI; WCNUCOMI]. The list on frequency of contact with management [WBMANCON] should be reduced and could be changed to match the list on frequency of JCC meetings [WCJCCOFT]. Similarly, the response list for questions regarding management's provision of information for meetings need to be aligned between WBMAINFO, WCRINFOR and WCNUINFO – adopting the always-never scale in WBMAINFO and WCNUINFO replacing the yes/no response.

Currently, there is some crossover between WBMAMEET and WBJCC, both of which have follow-on questions and only asked of union reps. The first asks about negotiation or consultation meetings while the other asks only about consultation committees. The problem with the first question is that it is unclear whether the respondent is referring to a negotiation or consultation meeting, this has the potential to crossover with the following question, and it makes comparisons with questions asked of non-union representatives about consultation committees difficult. It is proposed that WBMAMEET is restricted to negotiation (and does not include consultation), and this and the associated questions are moved to Section D on negotiation. As a result, the associated question on issues discussed at these meeting [WBCOMIT] can be deleted, as Section D asks respondents whether they negotiate, are consulted or informed on a list of issues.

Section D: Negotiation, Consultation and Information Provision

In this section we examine pay negotiation in terms of who is involved and how a decision is made, whether management consults or negotiates on a range of other issues, and management's provision of financial and organisational information. Section D replicates many questions that are

asked of management and is useful in that it provides two perspectives on the degree of consultation and/or negotiation.

A substantial restructure of this section is proposed. It is advised that the Section should commence with WBMAMEET (moved from Section B) and the associated questions [WBMAUN, WBMANU]. Extending these questions to all representatives (not just union reps) should be considered. These questions could then be followed by the list of items asking the respondent whether they negotiate, consult, inform or not involve. However, it is recommended that this list is reduced to a number of key items such as pay, hours, holidays, pensions and another two items, possibly, training and disclipinary and grievance procedures combined. The changes should mirror those made to the MQ.This would mean that issues discussed at negotiation meetings [WBCOMIT] could be deleted to reduce duplication.

These general negotiation questions would then be followed by more detailed questions about pay determination, starting with an intro of 'I now want to ask you about how pay is determined' [DINTRO]. It is proposed to remove 'at this workplace' from the introduction as this has previously created confusion among respondents. It is important to note that the MQ does not specify 'this workplace' in questions about negotiation. For further clarification it is suggested a question is added asking the rep at what level changes in pay are determined (i.e. at the workplace, at the organisation level, or at a national level in the case of government organisations). The following question would be whether the rep was personally involved in negotiating pay [WDINVORE]. Questions proposed to be suspended are:

- Whether management consulted or negotiated in the last pay settlement [WDCONONE]. There appears to be some duplication with this and WDPAY.
- Whether the pay settlement consisted of formal or information negotiation/consultation [WDFORMAL]
- Whether reps consulted employees prior to negotiation/consultation with management [WDCONEMP].
- Questions about organisational and financial information provided by management [WDINV, WDFIN, WDWHOLE, WDSTAFF] as the same questions are asked in the MQ, and similar questions in the SEQ.
- Management provision of information including, internal investment plans [WDINV], financial position of the workplace [WDFIN], financial position of the organisation [WDWHOLE], and staff plans [WDSTAFF]. Similar questions are asked in the MQ and SEQ.

A suggested addition is to ask reps involved in the last pay negotiation what the pay negotiations covered. That is, whether it included discussions about hours reductions or forced leave. The relationship between hours and pay became particularly important in the last recession.

It is proposed that the questions about the particular parties involved in the last pay negotiation [WDINVU, WINVNU] be simplified into one question asking whether there were other parties involved in the last pay settlement.

The question asking reps if there was any information requested from management before the commencement of pay bargaining [WDINFORE] requires modification. It provides a filter for the following question that seems to refer to all information requests [WDLASTRE], not just those prior to bargaining. It is proposed that 'before' is removed from the question stem in WDINFORE.

Section E: Role of Employee Representatives

Section E further explores the activities of worker reps by asking about how they communicate with employees, the training they are provided and their attitudes toward management.

Proposed deletions are:
- Types of training provided to the representative in the last 12 months [WEWHATR];
- Who the training provider was [WEORG]; and
- One of the attitudinal questions of: management value the opinions of reps [WEMANVAL] or management is supportive of reps [WEMANSUP] as they are very similar.

Section F: Collective Disputes

This section asks worker reps about collective disputes and the formal procedures to deal with these, industrial action taken and ballots held in the last 12 months. While these data on disputes, industrial action and ballots do not provide representative data on British workplaces, it is useful to examine these reports in terms of the worker reps' experience and perspectives of carrying out their role in the workplace. It is also useful to measure these data items against managers' reports of industrial action provided from the MQ.

The question asking reps their satisfaction with the collective dispute procedure [WFDISPA] could be suspended. Interpretation of this data item is difficult as there are a variety of factors which could contribute to satisfaction or dissatisfaction. Along those same lines it is recommended that questions in Section G regarding reps' satisfaction with the grievance procedures and discipline procedures [WGGRIESA, WGDISSAT] are also suspended.

It is proposed that the response codes for industrial action taken and threatened [WFINDA, WFTHREA] be reduced to strike, overtime ban or restriction by employees, work to rule, other (including go slow, blacking of work, sit in), and none of these. If one of the responses are 'strike' then the respondent could be routed to an additional question about the length of the strike.

Section G: Redundancies, Grievance and Disciplinary Procedures

Section G covers the incidence of redundancies and how they were handled, individual grievances and procedures, discipline and dismissal procedures, and the role of the rep in any Employment Tribunal matters.

The topic of redundancies will be central to the 2011 data collection, and it will be important to gauge the role of non-union representatives. It should be considered whether (in possible alignment with the MQ) the timeframe for these questions needs to be extended or questions added to include the recession period while keeping the time-series questions. It is also suggested that extra response codes for the redundancy issues covered in consultation [WGISSCO] and changes in redundancy as a result of consultation [WGCHANG] be added. Back-coding in WERS5 included: 'preparing employees for redundancies', 'details of applying for redundancies', 'reason for redundancies'. It is proposed that the first be added as support for employees who have been made redundant can be a key feature of consultation outcomes. However, the latter two would need to be refined as they appear to be more about information provision than consultation.

Proposed suspensions include:
- questions regarding the rights of the employee's companion at either a grievance or discipline and dismissal meeting [WGCOMP/ WGOCMP];
- open question on the reasons why the grievance procedures are not used [WGPROCN];
- whether the employee first approached the rep before management [WGREAPP];
- representation by a full-time union official [WGGRIEVO]; and
- see also the discussion above regarding WGGRIESA and WGDISSAT.

Lists that can be simplified and reduced are those on the parties who accompany the employee at a grievance meeting [WGGACC] and the type of grievances in the last 12 months [WGGRIE].

Another option is to merge whether the representative is automatically notified of the grievance [WGNOTIFY] and the stage at which the rep becomes involved in the grievance [WGGRIEC]. It is also suggested that the ability of multiple response is removed from this latter question and the respondent should be asked to respond on a 'usual' basis.

A proposed addition to the questions on discipline and dismissal is whether the procedure was used in the last 12 months. The individual grievance equivalent is WGPROCYR.

It is suggested that the question asking reps whether the rep represented an employee at an Employment Tribunal hearing [WGTRHEAR] be widened to ask about providing support to the claimant throughout the process, not just the hearing. In WERS5 n=33 reps reported representation at a hearing.

Section H: Employee Representative – Management Relations
This section only consists of four questions, asking the rep to rate their relationship with management and three attitudinal questions regarding trust in mangers. The same trust questions are asked in the MQ and the review currently proposes reducing these to two. It is recommended that the same changes be made to the WRQ.

Section I: Contact with External Organisations

This section identifies any external sources of support and advice employed by the worker representatives. It asks union reps about contact with paid union officials and all reps about external bodies (such as Acas). No deletions are currently proposed for this section. However, the reasons for contacting a paid union official [WIOFFLE] could be reduced to the two main reasons for doing so, rather than inviting unlimited multiple-response.

Section J: Union Recruitment

Section J covers the issues surrounding union recruitment including management attitudes and behaviour, and union rep's reports of recruitment attempts and strategy.

The questions on management's views of union membership and whether they actively encourage or discourage union membership [WJMANATT, WJFOR, WJAGAINST] have been previously been asked of mangers in the MQ. However, these questions have been highlighted as possible suspensions. It would be useful to continue to collect this information from worker reps to understand the environment they feel they are operating in. However, the open-ended questions about how mangers actively encourage or discourage membership could be suspended [WJFORHOW, WJAGGHOW].

It is also proposed that the following questions be suspended:
- whether new recruits have been at the workplace for more than one year [WJYEAR];
- attempts to recruit employees who are already covered by the union [WJINFILL] and the success [WJINREC]; and
- attempts to recruit employees who are not covered by the union [WJEXPAN] and the success [WJEXPREC].

Section K: Workplace Change

Section K examines whether workplace change has occurred or been proposed and what the role of the worker rep has been. The issue of workplace change is covered in the MQ, however, it may be particularly pertinent to the recession to examine the role of worker reps in workplace change. However, modifications could be made to reduce the long response lists of types of workplace changes [WKMANCH, WKMIMPCA] and unsuccessful changes [WKNONCH]. It is also suggested that the multiple response and interview prompt for more answers is removed from the reason why the change was unsuccessful [WKWHYNO] – prompting the main reason.

Section L: Personal Characteristics

This section collects demographic information on the respondent. Any changes made here will be in line with changes made to the Survey of Employees Questionnaire (SEQ).

Appendix A – Questionnaire detail

Appendix Table 1 lists all the data items produced from the WERS5 WRQ and details who responds to the question (as there is a significant amount of routing and filtering), and the proposed change to the WERS6 questionnaire. The first left-hand column details the 'themes' of a group of questions. These themes were used in comparing the coverage of the WRQ and MQ.

Appendix table 1: Detail of existing questions and proposal for WERS6

Theme	Question	Topic	Respondent	Proposal
	Section A: Background Information			
Representative organisational info	WAREPTYP	Representative type	All	
	WUNION	Name of union.	Union reps	Modify
	WAREPSEN	Most senior union rep	Union reps	
	WAUREPCH	Reason senior union rep unavailable – open	Non-senior union reps	Delete
	WAWREPSE	Most senior non-union rep	NU reps	
	WAWREPCH	Reason senior non-union rep unavailable – open	Non-senior NU reps	Delete
Background on worker rep	WAREPSOC*	Rep's occupation	All	Modify
	WAHOURS	Usual working hours per week (*including all rep activities*)	All	Modify
	WAFULLTI	Full-time representative	All	Delete
	WAWREPUN	Member of a trade union or staff association.	NU reps	
	WOTHRUN/ WUNICOD2	Trade union non-union rep belongs to	NU reps member of TU	Delete
	WAWREPOF	Other official position in Union.	Union members	Delete
	WAREPYRS	Number of years as a representative	All	
	WASERVIC	Workplace tenure	All	
Worker rep's activities	WAPROTW13*^	Issues spent time on as a rep (12 mths)	All	Modify
	WAPROTIM*	Most important issue at workplace (12 mths)	All	
	WAHRSWRK	# of hours spent on representative activities per week.	All	Move below WAHOURS
	WAHRDK	Band of hours spent on representative activities per week.		Delete
	WAPAYHRS	Representative work paid by employer. *Change responses: Yes – all, Yes - Some*	All	Move below WAHRSWRK
	Addition	Is your position as a representative for a fixed period of time?		Add. Move to WAPAYHRS
	Addition	How many designated ULR are there in the workplace?		Add
	WAULR	Are you designated Union Learning rep?	Union reps	
	Section B: Structure of Representation at Workplace: Union Representatives			
Routing	WBUNONLY	Routing: JCC who represents union members only treated as union rep.	Union member NU reps	
	WBINTRO	Continue Section/Not applicable	-	
Union membership at the workplace	WBPROPME/ WBPROPPC	Number of union members at workplace.	Union reps (1 or 2)	
	WBRECHAN	Change in proportion of union members.	"	
	WBWHYDO5*^ WBWHYUP5*^	Reasons for decrease in union members Reasons for increase in union members	If change in members	Delete

	WBSOCME9*^	Occupational groups *represented*	Union reps	Delete
	WBREPOTH	Represent members of other unions	"	Delete
	WBREPNUN	Represent non-union members	"	Delete
	WBPROPFE*	Women as a proportion of *members*	"	Delete
	WBPROPPA*	Part-time employees as a proportion of *members*	"	Delete
Appointment of union rep	WBELECT	Appointed by election	"	Combine
	WBSELEC6^	Method of union rep selection	Non-elected union reps	
Dealings with other worker reps (UR)	WBNUMREP+	Other union reps present (exclude H&S)	Union reps	
	WBREPNUM+	Number of other union reps (excl. H&S)		Delete
	WBOTHREP+	Other union reps present	More than one union in wp	
	WBJTMEET+	Meetings with other union reps, management not present.	Where other union reps	Delete
	WBUNREL+	Relationship with other union reps	"	Delete
	WBNUREP+	Non-union reps present	Union reps	
	WBNUMEET+	Meetings with other non-union reps, management not present.	Where other NU reps	Delete
	WBEEREL+	Relationship with other NU reps	"	Delete
Dealings with managers – negotiation and consultation committees (UR)	WBMAMEET	Regular meetings with management (to negotiate or consult).	Union reps	Modify & move to Section D
	WBMAOFT	Frequency of meetings with management	Mgt meetings	Delete
	WBMAUN	Meetings attended by reps of other unions	" & union reps	Move to D
	WBMANU	Meetings attended by non-union reps	" & NU reps	"
	WBCOMIT14	Issues discussed at meetings	Mgt meetings	Delete
	WBMAINFO	Provision of information for meetings *Align with WCRINGFOR: always-never scale.*	"	Modify & move to Section D
	WBJCC	Member of a consultative committee.	Union reps	
	WBCOMB014	Issues discussed at consultative committee	CC	Delete
	WBPROCES	Manager's approach at consultative committee	CC	
	WBMANCON+	Contact with management (other than formal negotiation or CC)	Union reps	Change list (eg. WCJCCOFT)
	WBINDIV	Contact for individual or collective issues.	Where is contact	Modify Add: 'both'
	WBWHOMA1-5	Person approached to discuss issue.		Delete
Section C: Structure of representation at the workplace – Non-union representatives				
Joint Consultative Committee	WCJCCID/ WCJCCNAM	Check JCC NU rep sits on	JCC rep (3)	
	WCJCCNUM	Number of NU reps on JCC	"	Delete
	WCJCCOFT	Frequency of JCC meetings	"	Delete
	WCCOMI14	Issues discussed at JCC meetings	"	Delete
	WCREPINF	Influence of employees/reps at JCC.	"	Delete
	WCREPBLO	Block managerial initiatives.	"	Delete
	WCRINFOR	Provision of information for JCC meetings	"	
	WCPROCES	Manager's approach at consultative committee	"	
	WCUREPA++	Union reps present	JCC rep	Routing unclear
	WCUSIT	Union reps member of JCC.	JCC rep + union rep	Delete
Dealings with other worker reps (NUR)	WCUMEETA++	Meetings with union reps, management not present.	"	Delete
	WCURELA++	Relationship with union reps.	"	Delete

	WCNUOTH+	Other NU reps present (excl. H&S)	[Standalone] NU rep (4)	
	WCNUNUM+	Number of other NU reps	SANU rep + other NU rep	Delete
	WCUREPB++	Union reps present	SANU rep	
	WCUMEETB++	Meetings with union reps, management not present.	"	Delete
	WCURELB++	Relationship with union reps.	"	Delete
Dealings with managers – negotiation and consultation committees (NUR)	WCNUMEET+	Regular meetings with management (to ~~negotiate or~~ consult).	"	Modify
	WCNUOFT+	Frequency of meetings with management	" + mgt meetings	Delete
	WCUATT+	Meetings attended by union reps	"	Delete
	WCNUCOMI14+	Issues discussed at meetings	"	Reduce list
	WCNUINFO+	Provision of information for meetings *Align with WCRINGFOR: always-never scale.*	"	Modify
	WCMANCON+	Contact with management (other than these meetings)	All NU reps	
	WCINDIV+	Contact for individual or collective issues. *Align wording with WBINDIV*	NU reps with contact	Modify Add: 'both'
	WCWHOMA1-5+	Person approached to discuss issue.	All NU reps	Delete
Non-union representation at the workplace (NUR)	WCPROPME/ WCPROPPC+	Number of employees represented at workplace	"	Delete
	WCSOCME9	Occupational groups represented	"	Delete
	WCPROPFE	Women as a proportion of members	"	Delete
	WCPROPPA	Part-time employees as a proportion of members	"	Delete
	WCREPNUN	Represent union members	"	Delete
Appointment of NU rep	WCHOWREP	Appointed by election	"	Combine
	WCSELRE5	Method of union rep selection	Non-elected NU reps	
	Section D: Negotiation, Consultation and Information Provision			
	Insert WBMAMEET & associated questions here			
Pay negotiation	DINTRO	'I now want to ask you about how pay is determined ~~at this workplace~~'		Modify & move to WDNVORE
	Addition	Are decisions about pay made at this workplace, another workplace within the organisation, (or a national level)?		Add & move to WDNVORE
	WDPAY	Negotiate pay	All	
	WDINVORE	Personally involved in negotiating pay	If pay neg	
	WDINVU16	Parties involved in neg pay	Union reps	Combine & modify
	WDINVNU4	Parties involved in neg pay	NU reps	
	WDCONONE	Consult or negotiate.	Involved in last pay neg	Delete
	WDFORMAL	Formal or informal consultation/neg.	"	Delete
	WDCONEMP	Prior consultation with employees	"	Delete
	WDINFORE	Prior request for information from management	"	Modify
	WDLASTRE	Information provision (last occasion)	If info request	
	Addition	Issues discussed in pay negotiation: e.g hours	Involved in last pay neg	Add
	WDASKMEM	Members asked to accept pay offer	Pay negotiated.	
Issues negotiated with	WDHOURS WDHOL	Q: Negotiate, consult, inform or not involve. A: N, C, Informs, Not informs …	All	Move up to WDPAY &

managers	WDPEN WDRECRUI WDTRAINI WDDISCIP WDGRIEV WDMANPLA WDEQUOPP WDHEASAF WDPERFAP	hours of work/ holiday entitlements/ pension entitlements/ recruitment or selection of employees/ training of employees/ disciplinary procedures/ grievance procedures/ staffing plans/ equal opportunities/ Health and safety/ performance appraisals.		align any changes with MQ – reduce to 6 items
Management provision of organisational info	WDINV WDFIN WDWHOLE WDSTAFF	Mgt provide: internal investment plans	All	Delete
		Mgt provide: financial position of the wp		
		Mgt provide: financial position of the org		
		Mgt provide: staffing plans.		
	Section E: Role of Employee Representatives			
Communication with employees represented	WEGENMEE	Frequency of general meetings with employees (in last 12 months)	All	
	WEOFTMEE*	Meetings held during work hours	If meeting	
	WEOFFMEE	Time off to attend meetings	If during work time	
	WEADDME8^	Methods of communication with employees	All	
	WEPHON010* ^	Management provision of facilities	"	
Representative Training	WETRAINI	Representative training (12 mths)	"	
	WEWHATR6^	Types of representative training	If training	Delete
	WEMANPAI	Time paid for by management	"	
	WEORG6	Training providers	"	Delete
	WEEVTRAI	Ever received training?	If no training	
Attitudes toward management	WEMANCLO*	Att: reps work closely with management	All	
	WEMANVAL*	Att: mgt values the opinions of reps	"	Delete one or the other
	WEMANSUP*	Att: management is supportive of reps	"	
	WENEEDKN*	Att: management shares information	"	
	Section F: Collective Disputes			
Disputes	WFFORMPR	Formal collective dispute procedures	All	
	WFDISPPA	Collective dispute (12 mths)	"	
	WFPROCRE	Collective dispute procedures used	If procedure + dispute	
	WFDISPSA*	Satisfaction with dispute procedures	"	Delete
Industrial action (last 12 mths)	WFINDA11*^	Forms of industrial action taken (12 mths) *Reduce response codes to 'strike'.*	All	Reduce list
	Addition	Length of strike (days): less than 1, 1, 2-5, 5+	If strike	Add
	WFTHREA8*^	Forms of industrial action threatened (12 mths)	"	Reduce list
Ballots	WFBALLOT	Ballot conducted	Action / threat	
	WFNUMBAL	Number of ballots	If ballots	
	WFMAJFA2	Ballot results	"	
	WFPROPVO*	Proportion voted in [last] ballot	"	Modify
	WFPICKET	Picketing in last 12 months	All	
	Section G: Redundancies, Grievance and Disciplinary Procedures			
Redundancy	WGEMPRED	Redundancies (12 mths)	All	
	WGCONRED	Consultation over redundancies	If redundancies	
	WGWHOCO5* ^	Parties consulted over redundancies	If consulted	
	WGISSCO4^	Issues consultation covered	"	Add codes
	WGCHANG5*^	Changes in redundancy from consultation	"	Add codes
Individual	WGGREVPR	Formal individual grievances procedures	All	

Grievances	WGGRVMTG	Formal meeting for grievance	"	
	WGGACC10	Parties who accompany at grievance meeting	If formal meeting	Reduce list
	WGCOMP1-3	Rights of the employee's companion	If accompanied	Delete
	WGGRVAPL	Right to appeal result of grievance procedure	If procedure	
	WGPROCYR	Individual grievance procedures used in last 12 months.	"	
	WGPROCN2	Reasons why not used [open]	If not used	Delete
	WGPREAPP	Rep first approach before management	If procedure	Delete
	WGNOTIFY	Rep notified of grievance	"	Combine & remove multi response
	WGGRIEC4	Stage at which rep is involved	If notified	
	WGGRIE15	Types of grievances in last 12 months	If procedure used	Reduce list
	WGGRIEVO	Representation by a full-time union official	"	Delete
	WGGRIESA	Satisfaction with grievance procedure.	If procedure	Delete
Discipline and dismissal procedures	WGDISPRO	Formal procedure for discipline & dismissals	All	
	WGOTHMTG	Formal meeting for discipline & dismissals	"	
	WGOACC01-10	Parties who accompany at D&D meeting	If formal meeting	
	WGOCMP1-3	Rights of the employee's companion	If accompanied	Delete
	WGDISSAT	Satisfaction with disciplinary procedure.	If procedure	Delete
	WGAPPEAL	Right to appeal decision	All	
	Addition	D&D procedures used in the last 12 months	If procedure	Add
Employment Tribunal	WGTRAPP	Assisted with ET application	"	
	WGTRHEAR	Represented at ET hearing	"	Modify
	Section H: Employee Representative – Management relations			
Attitudes: Trust of management	WHRATERE*	Relationship between reps and managers (rating)	All	
	WHTRUST1-2, & 4*	Attitudes - Trust – relied upon, sincere, trusted to act with honesty & integrity	"	MQ?
	Section I: Contact with external organisations			
Contact with external organisations	WIMETOFF	Contact with paid union official	Union reps	
	WIOFFLE7 *^	Reasons for contact with official (7)	If contacted official	Reduce to 2 most frequent
	WIADVIC9*^	Bodies sought advice from.	All	
	WIREAS7	Reasons for contact with other bodies	Made contact	
	Section J: Union recruitment			
Management and union recruitment	WJMANATT	Management in/not in favour of union membership	All	MQ: EVIEWS – deleted
	WJFOR	Managers encourage membership or recruitment	In favour or neutral	MQ: EFOR – deleted
	WJFORHOW	How do they do this? [Open - coding frame]	Encourage	Delete
	WJAGAINST	Managers discourage membership or recruitment		MQ: EAGNST - deleted
	WJAGGHOW	How do they do this [Open – no coding frame]	Discourage	Delete
	WJINFNWE	Informed of new recruits	Union reps	
Union recruitment: attempts,	WJTRIED	Recruitment attempts (12 mths)	"	
	WJINFILL	Attempt to recruit employees who are already covered by union	Recruit attempts	Delete

potential members, and strategy	WJINREC	Success in recruitment - covered	If yes above	Delete
	WJEXPAN	Attempt to recruit employees who are not covered by union	Recruit attempts	Delete
	WJEXPREC	Success in recruitment – not covered	If yes above	Delete
	WJYEAR	New members who have been working for more than 1 year (12 mths)	Recruit success	Delete
	WJINPOT	Covered, eligible and not members	Union reps	
	WJEXPOT	Not covered, eligible and not members	"	
	WJPLAN	Formal recruitment plan developed at workplace (12 mths)	If potential members	
	WJHELP5	Received recruitment assistance from union (12 mths)	"	
	Section K: Workplace change			
Workplace change	WKMANCH9*^	Workplace changes (last 2 years)	All	Reduce list.
	WKMIMPCA*	Change with the most impact on employees	>1 changes	Reduce list.
	WKCHATU*	Involvement of reps	If any change	
	WKNONCH9*^	Reasons why attempts were unsuccessful	Add routing	Reduce list.
	WKWHYN10^	Reasons for no success	If yes above	Delete multiple response
	Section L: Personal Characteristics			
Respondent demographics	WLREPGEN	Sex	All	
	WLAGE	Age in years	"	
	WLETHNIC*	Ethnicity	"	
	WLDISAB1	Long-term health problem or disability	"	
	WLDISAB2	Health problem or disability impacts on work	If disability	Possible deletion

+ Repeat question in another section (but different respondent)

++ Repeat question within section

* Use of show card

^ Multiple response [This has to be reviewed. Multiple response without limitation can become meaningless and takes up time].