



SCRIPT FOR VIDEO 3

Building effective equality, diversity & inclusion (EDI) practice for larger organisations.

[Slide 1: Title slide](#)

Hello, my name is Ila Chandavarkar from Cambridge Ethnic Community Forum or CECF. I am with my colleague Louise Tan who is the Development Officer for CECF. We are a charity based in Cambridge working primarily in the field of race equality.

In this short presentation, we will be looking at tips to develop good Equalities, Diversity and Inclusion practice, which we'll refer to as EDI. We'll look at how to develop the right tools to ensure effective reach and engagement with people with characteristics or features that are protected by the Equality Act, which makes discrimination against these individuals or groups illegal. The Equality Act states discrimination is illegal on the grounds of age, disability, race, religion or belief, sex, and sexual orientation etc.

This is one of 3 recordings we have made. Part 1 is about *Driving Change by Addressing Concerns to Foster Good EDI Practice*. Part 2 is divided into separate guidance for smaller and then for larger organisations, with guidance on templates and tools for EDI. This recording is for large organisations with three or more staff.

[Slide 2: What this presentation will cover](#)

This presentation will look at reasons to implement good EDI practice in terms of the benefits this brings to organisations. It will then suggest some ideas for how to achieve this, suggesting ways to build effective EDI policy or guidance, as well as how you implement EDI goals through strategy or planning and action plans. There is an accompanying transcript and at the end of the transcript there are guidance links to further resources.

[Slide 3: Benefits of EDI](#)

For more information on the benefits of EDI, please see our part 1 recording *Driving Change: Addressing Concerns to Foster Good EDI Practices in Your Organisation*. There is a link to this in the guidance links at the end of the transcript.

In summary, by implementing policies to bring about good EDI practice, some examples of benefits are:

- Wider and more effective organisational reach
- Meeting legal requirements
- Higher client satisfaction
- Greater creativity and innovation

[Slide 4: Steps to develop good EDI practice](#)

The Charity Governance Code outlines steps for good EDI practice, and we have used this to outline the points in this slide. See the link in the transcript for more information on the Charity Governance Code EDI section.

Before you get started on developing EDI practice, it is essential to get buy-in by involving everyone in the organisation to understand what is needed. This could be part of an organisational away day for planning, or through discussions at Board and team meetings.

To implement good EDI practice, we suggest the following four steps:

1. First, develop an EDI policy. Policy is a guidance document to guide how the organisation will carry out EDI.
2. Second, develop the steps you will take to put policy into practice by developing strategy. Strategy is an overall plan of how you will action EDI and helps you decide priority areas. To inform your strategy, you will need to collect data to decide your priority areas. There is a guidance link on data protection legislation and confidentiality which you'll need to consider when collecting data.
3. Third, set your Action Plan for each priority area with tasks, targets and timetables.
4. Finally, review action and lessons learned.

In developing strategy and action plans you may find it helpful to get advice if you feel this will be of benefit. This may be from similar organisations that have implemented EDI successfully or it may be advice from groups that represent those your organisation wants to reach.

[Slide 5: What is policy and how does it help?](#)

So what is EDI policy and how does it help? A policy helps by giving clear guidance spelling out how and what the organisation will do in a particular thematic area such as EDI. EDI policy:

- Gives organisational commitment and values.
- Spells out roles and responsibilities.
- Gives the steps on what the organisation needs to do to ensure EDI. The EDI policy will outline what the processes are that it will follow in different areas of work of the organisation, for example, in areas of work such as recruitment or service delivery.
- Provides guidance for clarity and consistency in the organisation.

EDI policies should state if there are links to other policies and procedures. For example, the EDI policy document may link to an Anti-Harassment/Anti-Bullying policy. There is a link to a resource in the guidance links at the end of the transcript. Resource Sheet 1 gives suggestions to help ensure that EDI policy is usefully implemented, and does not remain a document that no one looks at.

[Slide 6: EDI Policy Content](#)

This is a list of the items in a standard EDI policy:

1. A Statement of Intent (Sol)
2. A list of key aims
3. Roles and responsibilities
4. A Code of Conduct
5. A Code of Practice
6. A Complaints section which will give a brief outline on how complaints or concerns are dealt with. For example, those raised by non-staff will be dealt with through the organisation's complaints procedure; staff will need to use their employment procedures, for example, a grievance procedure.
7. Monitoring and Review

There is a link to an example EDI policy from CECF in the guidance links at the end of the transcript. There is also a link to the Resource Centre guidance on writing an EDI policy. This is included because it gives useful tips on how to write a policy, even though the guidance and model policies were developed for smaller organisations.

[Slide 7: What is a Statement of Intent \(Sol\)?](#)

EDI policy should start with an organisation's Statement of Intent or Sol. An Sol could have the following:

- why the organisation is committed to EDI and organisational values
- how EDI is linked to the organisation's purpose
- a recognition of discrimination
- a list of groups that the organisation recognises face discrimination, usually those listed in the Equality Act although organisations can add additional groups that they recognise face discrimination, such as those disadvantaged by their socio/economic background
- an overview statement of what the organisation will do to eliminate discrimination
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An Sol is usually displayed publicly and may list a contact for people to find out more about the organisation's EDI policy and practice.

Ideally, the Sol links its intentions regarding EDI to an organisational purpose. There is a link in the guidance links at the end of the transcript to an Sol from Refuge which shows how EDI can be linked to organisational purpose. The CECF EDI policy also has an example Sol.

[Slide 8: Example of EDI aims](#)

Here are examples of EDI aims which are about working to:

- eliminate discrimination

- increase awareness within the organisation and externally, of groups that face discrimination
- ensure Trustees, staff and volunteers understand how discrimination works and the implications
- ensure that Trustees, staff and volunteers reflect the composition of the local community as far as possible
- ensure services treat all fairly
- make premises, venues and equipment as accessible as possible

You need to look at your organisation to see what you feel is relevant in terms of aims or ambitions you have regarding EDI. The rest of your policy will guide you in how you hope to realise these aims. Aims are aspirational and list what you hope to achieve.

[Slide 9: Roles and responsibilities](#)

Roles and responsibilities should be defined. Here is an example listing the Board role which is about overall responsibility for ensuring effective EDI policy and practice; the Chief Executive Officer role which is about managing day-to-day implementation of EDI, and the role of line managers which is about ensuring EDI in their areas of work.

It is important that regardless of who has particular stated responsibilities, the policy states that everyone in the organisation has responsibility to promote and help develop EDI and ensure there is no discrimination.

[Slide 10: Example Code of Conduct](#)

A Code of Conduct is the rules and standards that an organisation has about the behaviour that is expected within the organisation. For example, treating everyone with respect, not making offensive comments or jokes, not personalising a disagreement and if you challenge inappropriate behaviour doing it respectfully. It is good practice for an organisation to have a separate Code of Conduct and just list the key points in the EDI policy.

There is a guidance link in the links at the end of the transcript to Resource Sheet 2 which gives an example Code of Conduct.

[Slide 11: Code of Practice](#)

A Code of Practice, sometimes referred to as standards, comprises the practical measures you build into organisational processes to ensure EDI is integral to all that you do and the processes meet a standard. There could be a separate Code of Practice for each area of work in an organisation, for example in areas of work such as governance, employment, volunteering, recruitment, career progression and training, marketing and communication and service delivery.

For each area of work list the different elements that have to be done and examine each for good EDI practice.

[Slide 12: Code of Practice example in recruitment](#)

For example, here are some points in recruitment listing elements and EDI practice for each element:

For the element of a principle in recruitment e.g. is it open or closed	The EDI practice would be to have a principle of open and fair recruitment and list the few cases of exceptional circumstances where this may not be carried out.
For the element of advertising jobs	The EDI practice would be to prepare accessible documents to advertise the role and ensure that this reaches diverse audiences. For it to successfully reach diverse audiences you will have to ensure accessible language, format and relevant images.
For the element of shortlisting and interview	The EDI practice would be to ensure in shortlisting and interviewing that you can show how you ensure a fair process, for example, by using neutral and unbiased criteria taken from the person specification and used in the same way for all applications.

There is a guidance link at the end of the transcript to Resource Sheet 3 which gives guidance on EDI in recruitment. There is an additional link to Government guidance on positive action which can help ensure you level the playing field for under-represented equality groups. Positive action is legal. The guidance also describes positive discrimination which is illegal.

You may decide that it is more practical for your organisation to have a simpler EDI policy that has a general Code of Practice or standards to cover everything rather than a Code of Practice for each area of work. There is a guidance link to the Red Cross website giving a general Code of Practice which is referred to as Standards.

We will now look at examples of EDI strategy and action plans.

[Slide 13: Example EDI Strategy](#)

Strategy will broadly involve looking at where the organisation is now in terms of meeting EDI aims, identifying areas for improvement and providing an overall plan to achieve these. Here is an example EDI strategy which provides an overview of what needs to be done. This shows:

View from the current state e.g. in September 2024. This shows:

- We have an EDI policy, produced in 2023 and are committed to implementing EDI. However, we have no other measures in place.

In analysing the present situation, the organisation might prioritise some areas for improvement.

For example:

- Awareness & training: Provide group training sessions for all staff on key aspects of EDI; decide how frequently this should take place.
- Ensure inclusive facilities: review accessibility of premises and facilities and take action to improve access.
- Increase representation: increase priority group representation, for example, the number of young people in the organisation.

These are just some ideas you may consider. There is a link to another example of an EDI Strategy from Sense in the guidance links at the end of the transcript.

[Slide 14: Action Plans](#)

Once you have decided your goals or areas of improvement, you need to develop an Action Plan for each goal or area.

An Action Plan helps you implement the changes you have identified in an organised way. It will:

- List your goals and the tasks for each goal
- Clarify what resources you need
- Lists tasks for the goal and a timeline
- List who holds the lead responsibility for this and may list other members who also have responsibilities
- It can also list measures so you can measure success

[Slide 15: Example Action Plan](#)

This is a basic template for an Action Plan.

Start by identifying the overall goal or main area to improve. In this example we have picked the goal of increasing awareness of EDI among staff members. You can then break down how you plan to achieve that goal into tasks.

For example:

- schedule EDI training session for all staff members to attend.
- Input when you want to have achieved that task by. In this case there is a completion date, but you may want to put two dates – when you start and when you complete by.
- Work out the resources you need: in this case, costs for a venue and external trainer to deliver.
- List who will be leading on this task. Having an individual who is responsible helps in ensuring there is a single focal point and it is clear who is doing what.
- Identify some measures of success. In this case that 90% of staff members attend the training session. You may also want to include other measures such as satisfaction rates and usefulness of session in increasing awareness.

Review after action to see how successful this was. Actual performance may indicate that only 75% of staff members attended the session and understanding the factors behind this could help you plan more effective EDI training sessions in the future. Please see the guidance link to Resource Sheet 4 which shows you how to monitor and review action plans. This is with the links at the end of the transcript.

You may wish to include an additional column addressing anticipated issues.

[Slide 16: Monitoring and Evaluation of your EDI policy](#)

Action plans and monitoring are about taking action to improve EDI. It is good practice to set up monitoring and evaluation of your entire EDI policy to see that it does work. Look at the link at the end of the transcript for Resource Sheet 5 for more information on monitoring and evaluation.

Monitoring

Monitoring is the data you need to regularly collect on each area of EDI guidance you have in your policy to see that practice is according to the policy.

Evaluation

Evaluations pick up more qualitative information on EDI, because they give more in-depth views on what people perceive and feel or concerns that they have.

It is important to only do the monitoring and evaluation that is feasible for your organisation to carry out. For example, you may decide to monitor one area of work every year.

If your organisation wants to consider additional groups to monitor other than those with protected characteristics, you may need to think about other types of monitoring. For example, you could do a review of concerns, grievances and complaints raised, to see if there are disproportionate issues raised by a particular group that the organisation believes also face discrimination but is not part of equality legislation.

Slide 17: Summary

This page is a summary of everything we've covered in this presentation.

Slide 18: More Information

For more information see Guidance Links for part 1: ***Driving Change: Addressing Concerns to Foster Good EDI Practice in your Organisation***

Contact us if you would like further information or have questions at:

CECF (cecfenquiries@cecf.co.uk) or CCVS (enquiries@cambridgecvs.org.uk)

Guidance Links

- Link to Part 1: *Driving Change: Addressing Concerns to Foster Good EDI Practice in your Organisation*

Charity Governance Code on EDI

- [Charity Governance Code section on Equality and Diversity](#)

GDPR & Confidentiality

- [Advice for small organisations | ICO](#)

EDI Policy and aspects of EDI Policy

- Resource 1: Suggestions to ensure EDI policy means real action
- [EDI Policy - CECF](#)
- [Guidance on writing EDI policy - Resource Centre](#)
- [Example EDI policy - British Red Cross](#)
- [Statement of Intent - Refuge](#)
- Resource 2: Example Code of Conduct
- Resource 3: Information on a Code of Practice in Recruitment

- [Government Advice on Positive Action](#)

Strategy

- [EDI Strategy - Sense](#)

Monitoring and evaluation

- Resource 4: Information on Monitoring and Evaluation of EDI Action Plan
- Resource 5: Information on Monitoring and Evaluation of EDI Policy