

EQUITY DIVERSITY AND INCLUSION POLICY

1. INTRODUCTION

- 1.1 South Yorkshire Community Foundation Limited (SYCF) is committed to a policy of promoting equity of opportunity in both the way it delivers and promotes its services to South Yorkshire communities and in its working practices. This policy, as appropriate, covers all grant seekers, job applicants, volunteers, strategic partners, contractors, trustees and employees. We will deliver all our services in an anti-discriminatory, fair and consistent manner.
- 1.2 This policy seeks to implement a programme of positive action to ensure that no person receives less favourable treatment because of age, disability, gender reassignment, marital or civil partner status, pregnancy or maternity, domestic circumstances, minority language, race, colour, nationality, ethnic or national origin, religion or belief, sex or sexual orientation (Protected Characteristics).
- 1.3 In addition, the Foundation opposes and wishes to eliminate discrimination against potential and existing staff, trustees, volunteers, clients and beneficiaries on the grounds of:
- Social Class
 - Obligations
 - Irrelevant Criminal Convictions

Our premises are wheelchair accessible and both physical and sensory access are taken into consideration when organising face to face and online meetings, events, webinars etc.

- 1.4 The following forms of discrimination are prohibited under this policy and are unlawful:
- (a) **Direct discrimination:** treating someone less favourably because of a Protected Characteristic. For example, rejecting a job applicant because of their religious views or because they might be gay.
- (b) **Indirect discrimination:** a provision, criterion or practice that applies to everyone but adversely affects people with a particular Protected Characteristic more than others and is not justified. For example, requiring a job to be done full-time rather than part-time would adversely affect women because they generally have greater childcare commitments than men. Such a requirement would be discriminatory unless it can be justified.
- (c) **Harassment:** this includes sexual harassment and other unwanted conduct related to a Protected Characteristic, which has the purpose or effect of violating someone's dignity or creating an intimidating, hostile, degrading, humiliating or offensive environment for them. Harassment is dealt with further in our Anti-harassment and Bullying Policy.

- (d) **Victimisation:** retaliation against someone who has complained or has supported someone else's complaint about discrimination or harassment.
- (e) **Disability discrimination:** this includes direct and indirect discrimination, any unjustified less favourable treatment because of the effects of a disability, and failure to make reasonable adjustments to alleviate disadvantages caused by a disability.

2. OUR COMMITMENT AND STATEMENT OF OVERALL POLICY

- 2.1 This policy sets out South Yorkshire Community Foundation Limited (SYCF) approach to equity, inclusion and diversity, and specifically the avoidance of discrimination at work. It applies to all aspects of employment with us, including recruitment, pay and conditions, training, appraisals, promotion, conduct at work, benefits, facilities, access to flexible working, disciplinary and grievance procedures, and termination of employment.
- 2.2 SYCF must not unlawfully discriminate against or harass other people including current and former employees, job applicants, clients, customers, suppliers, and visitors. This applies in the workplace, outside the workplace (when dealing with customers, suppliers, or other work-related contacts) and on work-related trips or events including social events.
- 2.3 All promotional literature must not imply that there is a preference for one group of applicants and should reflect the diversity of local communities and service users within South Yorkshire.
- 2.4 We are committed to recruiting donors from all sections of the community.
- 2.5 We are committed to increasing the diversity of our grant panel members and other volunteers, Board and staff team to reflect the local community that we serve. This will be kept under regular review by Executive Committee.
- 2.6 SYCF actively encourages grant applications from all sections of the community including targeted webinars, video applications. SYCF's Grant Making Procedures will ensure that all applications are treated equally on merit without discrimination on any grounds.
- 2.7 SYCF is committed to providing additional services through its funding advice service, South Yorkshire Funding Advice Bureau (SYFAB), to support disadvantaged marginalised community groups and communities. For example, webinars, face to face meetings, training opportunities, some subsidised and outreach work.
- 2.8 All staff, whether temporary or permanent, Trustees and volunteers have a duty to act in accordance with this policy and always treat colleagues with dignity, and not to discriminate against, bully or harass other members of staff, Trustees or volunteers regardless of their status. SYCF has a separate Anti-harassment and Bullying Policy. SYCF will regularly review the implementation of its Equity, Diversity and Inclusion Policy and Action Plan.

Where evidence is found of ineffectiveness, immediate remedial action will be taken to ensure implementation.

- 2.9 The Chief Executive is responsible for this policy and any necessary training on equity, inclusion and diversity, with the emphasis on unconscious bias, for staff, volunteers and Trustees.
- 2.10 All aspects of grant making, and personnel policies and procedures will be kept under review to ensure that they do not operate against equity, inclusion and diversity practices. This policy does not form part of any employee's contract of employment, and we may amend it at any time.
- 2.11 Overall responsibility for implementation and monitoring of this policy remains with the Board of Trustees.
- 2.12 SYCF will keep under regular review its Complaints and Appeals processes.

3. Policy Implementation - Responsibilities

South Yorkshire Community Foundation's aims and objectives are to ensure that:

- To encourage, promote and celebrate diversity in all SYCFs activities and services.
- Employees and volunteers (where appropriate e.g. panel members) are aware of their personal obligations to avoid discrimination in accordance with this Equity, Diversity and Inclusion Policy.
- To ensure compliance with legislation on discrimination and Equity.
- No applicant or employee is treated less favourably than another in accordance with this policy.
- No applicant or employee is placed at a disadvantage by requirements, conditions or procedures which have a disproportionately adverse effect on them and cannot be shown to be necessary for the satisfactory completion of the job.
- Entry into SYCF and opportunities for promotion and training are made available to all applicants.
- No individual is discriminated against in accordance with this policy in respect of selection for redundancy, short time working or dismissal.
- Where appropriate and permissible within the law, members of under-represented groups and volunteers are given training and are encouraged to achieve Equity of opportunity.

- SYCF will ensure that it keeps under review its Appeals and a Complaints process for anyone wishing to raise issues of concern about our services.
- To ensure that through positive action and so far as is practicable, that all the services of SYCF are accessible to all sections of the community.
- To create environments free from harassment and discrimination.
- To confront and challenge discrimination where and whenever it arises whether it be between colleagues, or in any other area relating to the work of SYCF.
- To maximise the use of resources in the best interests of staff, volunteers and service users.

3.1 SYCF recognises that passive policies do not provide equity and will seek to promote equity and diversity within the following framework of responsibilities.

3.2 Responsibility for implementing and developing the Policy rests with the Board of Trustees. The overall co-ordinating responsibility for equity, diversity and inclusion and management of the Policy and Action Plan is delegated to the Chief Executive. However, SYCF believes that all who work with, or for, the organisation has an individual responsibility to accept the policy and ensure a personal involvement in its application; to co-operate actively to ensure that the environment we desire is a reality.

Therefore, SYCF expects individuals:

- to co-operate with measures introduced by SYCF to ensure equality of opportunity, diversity, and non-discrimination.
- not to harass, abuse or intimidate any other employee or participant because of a protected characteristic they have.
- to feel sufficiently confident to inform management if they suspect discrimination is taking place.

SYCF will take measures to:

- ensure that proper records of employment decisions are maintained, and regular reviews of employment practices are carried out.
- ensure that grievances are dealt with in a fair and consistent manner and in line with SYCF's Grievance Policy and Procedure.

- vi. ensure that individuals within their area are aware of their legal responsibilities, and SYCF's Equity, Diversity and Inclusion Policy.
- vii. promote the benefits of employee and participant diversity, in employment, services and training.

The Chief Executive will:

- i. support line managers, offer advice and make recommendations in relation to Equity, Diversity and Inclusion and implementing relevant policies and procedures.
- ii. seek the views and opinions of employees, volunteers, and other stakeholders on the operation of the policy in their area of interest/responsibility, in particular to meet the diverse needs of the users.
- iii. facilitate training and discussion on Equity, Diversity and Inclusion issues as appropriate.
- iv. ensure Board Members and staff are appraised regularly on the state of equity, diversity and inclusion opportunities within SYCF.
- v. ensure that the Equity, Diversity and Inclusion Policy, the Action Plan and associated documents are reviewed on a basis agreed by the Board of Trustees, Internal Working Group and the SMT.
- vi. review and approve policies, procedures and practices that impact on equal opportunities and diversity practice.

4. Policy Implementation: Recruitment and Promotion

- a. SYCF strives to ensure that our Board Members, staff and volunteers reflect the wider community.
- b. Clear and accurate information on vacant posts should be available through advertisement, job descriptions, person specifications and interview.
- c. Recruitment material should not imply to any preferred group, unless a genuine occupational qualification exists limiting a post to a particular group.
- d. Applicants will be informed, through all recruitment material, of SYCF's commitment to Equity, Diversity and Inclusion and the existence of this policy.

- e. Person specifications may include 'essential' and 'desirable' requirements that are necessary and justifiable. Care and advice where necessary is needed to ensure these are not discriminatory.
- f. Staff should be encouraged to discuss their development and training needs through a process of regular support and annual appraisals.
- g. Job titles that are discriminatory should be avoided.

5. Policy Implementation: Interviews and Selection

- a. The shortlisting panel will not select candidates on the basis of gender, name, disability or age of the candidate, and will respect the confidentiality of the candidates and the selection process.
- b. The interview panel must take extreme care not to ask discriminatory questions unrelated to the requirements of the job, eg race, colour, nationality, ethnic or national origin; sex; marital status or caring responsibility; sexual orientation; age; physical, sensory or learning disability; mental health; political or religious beliefs; class; HIV status; employment status; unrelated criminal convictions; union activities.
- c. When interviewing, take a fair and consistent approach to the way candidates are dealt with.

6. Policy Implementation: Training

- a. In line with the intentions of this policy, SYCF will not discriminate in the provision of training courses/opportunities wherever possible.
- b. Appropriate training will be provided to enable trustees, staff, volunteers, and committee members to perform their jobs effectively. The training offered will take into account the needs of all people.
- c. Briefing on this policy will form part of the Induction Procedure for trustees, staff, advisers and volunteers. Everyone will be asked to sign the Policy document to demonstrate that they have read and understood their obligations.

7. Enforcement

- a. SYCF recognises the need for a continuing commitment to genuine equity, diversity and inclusion within the organisation. The effectiveness of the policy's aims and objectives can only be judged by how the policy operates in practice.

8. Policy Enforcement – Grievances

- b. Any staff member or volunteer who feels a victim of unlawful discrimination or unfairly treated in a way contrary to the intention of this policy, should raise the issue through SYCF's established Grievance Procedure (which is included in the Staff Handbook).
- c. Any job applicant who feels unfairly treated and contrary to the intention of the policy, should raise the issue with the Chief Executive or the Chair of the Board of Trustees.
- d. All incidents of **direct discrimination** are disciplinary offences and will be dealt with under the Disciplinary Procedure.
- e. Incidents of **indirect discrimination** will be investigated to determine whether they should be deal with under the Disciplinary Procedure.
- f. Incidents of **victimisation** or **harassment** will be dealt with in accordance with SYCF's Harassment Procedure. Where incidents of victimisation and harassment are proven, the issue will be dealt with under SYCF's Disciplinary Procedure.
- g. SYCF will treat all grievances sensitively and confidentially, however minor they may appear.

9. Policy Enforcement – Disciplinary Procedure

- h. Any member of staff found to be in breach of this policy, will be subject to disciplinary action in accordance with the Staff Handbook.
- i. Any volunteer found to be in breach of this policy will be counselled on his/her actions and may, where necessary, be removed as a SYCF volunteer.
- j. Any member of any committee or advisory panel of SYCF found in breach of this policy will be counselled on his/her actions and may, where necessary, be asked to leave SYCF.

10. Monitoring

- a. SYCF view the collection/analysis of data is vital in informing change and improving performance. Where appropriate, statistics of SYCF's services will be collected and analysed in relation to equity and diversity matters. Employee turnover will be reviewed and information on reasons for leaving will be determined.
- b. The Trustees will review periodically equity of opportunity relating to SYCF services. Recruitment and selection procedures will be monitored and reviewed by the Chief Executive. All aspects of personnel policies and procedures shall be kept under review to ensure that they do not operate against the Equity, Diversity and Inclusion Policy.

- c. In order to determine the impact of this policy, it is important that a monitoring system be developed which will measure commitment, progress and effectiveness. The Equity, Diversity and Inclusion Policy will be monitored and reviewed as follows:
- The Chief Executive will undertake an annual policy review, with a three yearly review by the Executive Committee. All staff will be encouraged to submit comments for consideration.
 - If recommendations for amendment/addition are considered appropriate, such recommendations will be presented to the Executive Committee for their comments and ratification.
 - The Trustee Board will review the policy every three years.
 - An Internal Working Group will be set up, chaired by a member of the staff team and will include the EDI Lead from the Board of Trustees and the CEO. This Group will be specifically responsible for monitoring the EDI Action Plan and reporting any issues into the SMT and the Executive Committee in the first instance.
- d. Where it appears that there may have been or there is a breach of the policy, the Chief Executive will investigate the circumstances and action will be taken to counter any proven breach of policy.
- e. If it is found that the policy is excluding or discouraging the development of trustees, staff or volunteers or restricting grant applicants, the Chief Executive should take positive action to re-adjust the policy.
- f. Standard exit documentation will be completed, and an exit interview carried out in the respect of all employees leaving the company. Reasons for resignation will be recorded and analysed.

11. BREACHES OF THIS POLICY

- 11.1 SYCF takes a strict approach to breaches of this policy, which will be dealt with in accordance with our Disciplinary Procedure. Serious cases of deliberate discrimination may amount to gross misconduct resulting in dismissal.
- 11.2 If anyone believes that they have suffered discrimination they can raise the matter through SYCF's Grievance Procedure or Anti-harassment and Bullying Policy. Complaints will be treated in confidence and investigated as appropriate.
- 11.3 No one will be victimised or retaliated against for complaining about discrimination. However, making a false allegation deliberately and in bad faith will be treated as misconduct and dealt with under our Disciplinary Procedure.
- 11.4 Any breaches by a volunteer e.g. inappropriate comments made at a panel, and Trustees will be investigated by the Chief Executive and the Chair of GPC; in the case of Trustees the Chair of SYCF will be involved.

- 11.5 This Policy and the Action Plan will be reviewed by the Executive Committee every three years, before submitting to the Trustee Board for approval. The Executive Committee will review the policy annual and recommend amendments if prompted by legislative changes or if believed to be in the best interests of the organisation.

Signed on behalf of the Trustees

Chris Booth Mayblin (e-signed)

Date: 8th August 2024

Review date: 8th August 2027

I confirm that I have read and understand the above policy.

Name:

Signed:

Date: