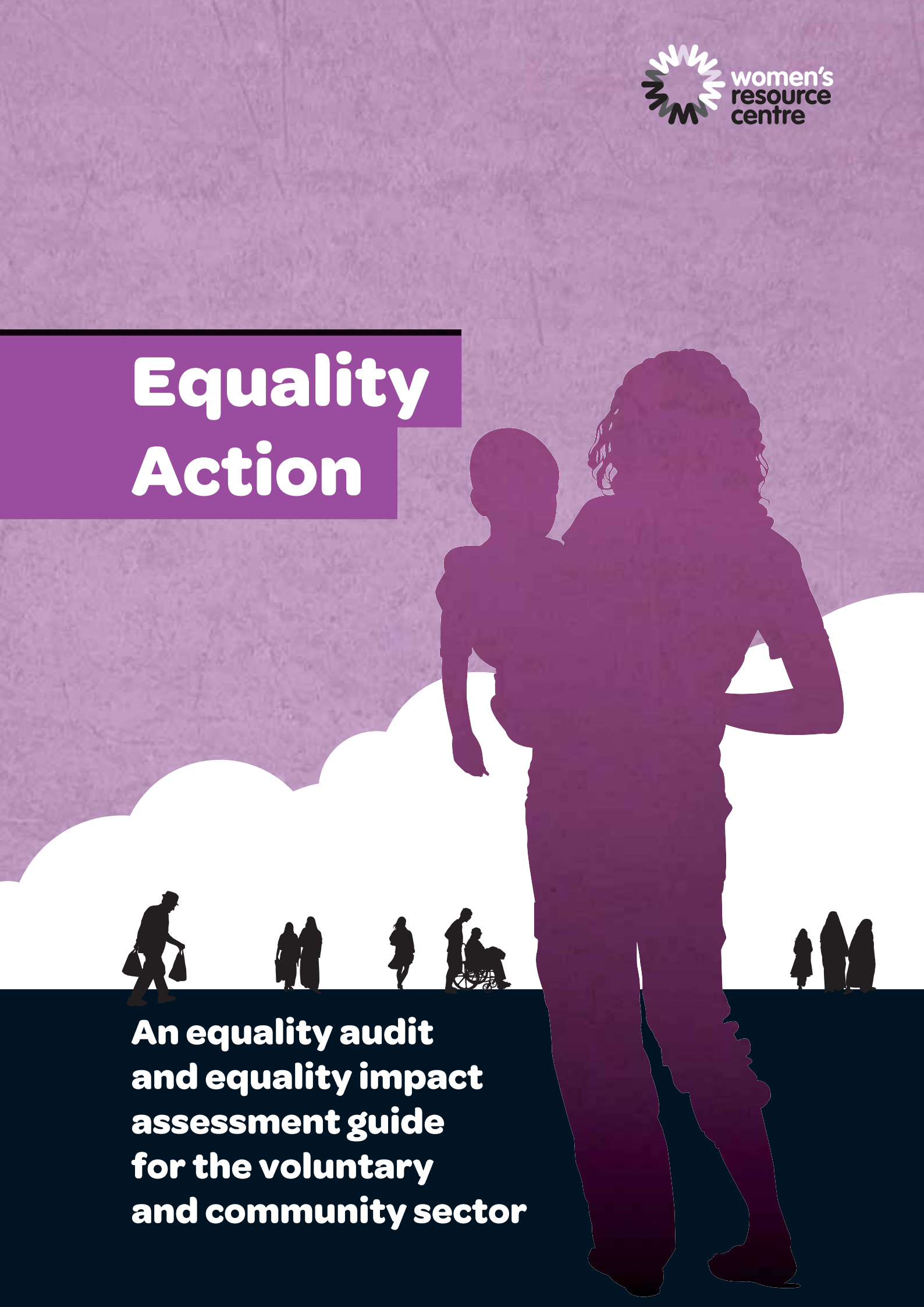


# Equality Action



An equality audit  
and equality impact  
assessment guide  
for the voluntary  
and community sector

 [www.improvingsupport.org.uk/equalityanddiversity](http://www.improvingsupport.org.uk/equalityanddiversity)  
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# Acknowledgements

This guide has been written by Kim Donahue from Urban Inclusion in collaboration with the National Equality Partnership, edited by Jaya Gajparia and Karen Constantine.

## The National Equality Partnership (NEP)

NEP supports the third sector to challenge inequality and promote equality and human rights. It is a three-year project, (2008-11) funded by Capacitybuilders, under the Improving Support Programme. The national programme covers the whole of England. NEP believes that people with direct experience of discrimination are best placed to develop solutions to address it, and aims to ensure that all work on equality, diversity and human rights in the third sector is done with the close involvement of equality organisations.

### What do we do?

We offer training, information and one-to-one support to umbrella organisations to help them challenge disablism, homophobia, racism, sexism and other forms of discrimination and human rights abuse. We enable organisations to increase their voices so that inequality is tackled effectively. All of our work promotes collaboration and partnerships, sharing expertise and encouraging long-term relationships between equalities organisations and the wider third sector. Our work is closely informed by our reference group encompassing all equalities sectors as well as generalist organisations. The partnership of NEP is made up of:

- » Women's Resource Centre (WRC)
- » Voice4Change England
- » Consortium of Lesbian, Gay, Bisexual and Transgender Voluntary and Community Organisations
- » National Association for Voluntary and Community Action (NAVCA)

Women's Resource Centre is the lead partner with core staff based at our London office.

National Equality Partnership

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# 1. Introduction

The purpose of this guidance is to provide a set of tools and resources to second- tier voluntary and community sector organisations to help them develop effective equality audits and impact assessments using creative and innovative techniques. We use a range of examples and case studies to illustrate particular points throughout the guidance. In using examples we aim to highlight methods that voluntary sector organisations can use to undertake audits and equality impact assessments (EIAs). The guide aims to be a collection of tools, techniques and best practice for the voluntary sector.

The guide is not a collection of scientific formulas that can reliably be expected to produce predictable outcomes. Communities are complex and the organisations which serve them have a variety of styles and work in a wide range of ways. It is also important to remember that even the best tools, used entirely appropriately by skilled people at a particular point in time can nevertheless fail to produce the desired outcome. It is important to avoid seeing the tools in this guide as simple ‘formulas’ to apply. They can never replace personal style, judgement or intuition. The tools come to life in the hands of practitioners exercising the skills that build trust, support relationships, facilitate dialogue and encourage participation.

The guide covers Equality **Audits** and **Equality Impact Assessments** as well as explaining some of the legal context associated with equalities. There are also stand alone resources (such as the equalities glossary) and signposting to further resources.

The guidance is aimed at voluntary and community organisations who:

- » Are delivering public services and who by definition have a duty to promote equality of opportunity
- » Would like to take some of the best practice tools and techniques to improve service delivery or assess the impact of projects on equality
- » Would like to lobby and hold the public sector to account if they are not fulfilling their duty to promote equality of opportunity, eliminate discrimination and promote community cohesion

In the following pages we offer a straight forward framework designed to help organisations understand Equality Audits, EIAs and how they relate to the voluntary sector delivering public services or those with an interest in using the tools and techniques to improve service delivery and to meet the needs of the communities we serve.

## 1.1 Context

Over the past 60 years the equality landscape has changed dramatically in Britain both in terms of public perceptions of minority groups as well as the legal framework. At the same time, relationships between the voluntary sector and the public sector have also changed as a result of the voluntary sector being commissioned to provide more public services and changes in funding scenarios.

Britain has had a significant presence of diverse ethnic minority groups throughout recorded history, for example the Jewish minority that was expelled in 1290, following a century of persecution. As the UK's role in world trade expanded, so did the numbers of minority ethnic populations in the country. Throughout the 19<sup>th</sup> century immigrants settled in London, particularly Irish and Jewish groups. In fact, the 1905 Aliens Act was the first major restriction on immigration to Britain and was enacted in response to popular hostility to Jewish immigrants (Thane et al, 2007). However, it was not until the post second world war period that saw both increases in ethnic minorities and the rise of modern social movements that laid the foundation for the current equalities climate.

In the 1970s, a movement for multiculturalism took root in schools and soon spread wider. As it developed, it also sought to educate and inform majority groups so that they would better understand the backgrounds and cultures of fellow students. As the festivals and holidays of other countries were introduced into schools, the idea of Britain as a multicultural society took hold. In the 1980s and 90s, multicultural rhetoric and policies were confined to supportive regional pockets such as London. Since the election of the Labour governments from 1997, multiculturalism has influenced official policies and statements. Precursors of present policy include the *Race Relations Act*, and the *British Nationality Act* of 1948 (see the timeline for further key dates). Recent years have seen the Government struggle with the tensions between unity and diversity which a multicultural nation inevitably creates. However, the last decade has seen the most comprehensive legislative package in relation to equalities than ever before. In some ways, Government policy in regard to equalities has been far ahead of public opinion, with the two just beginning to catch up.

The rise of the voluntary and community sector in public service delivery in the UK over the last decades has been well documented. The sector has grown to dominate some areas of public service provision, particularly in areas of social services and healthcare. This has occurred within the context of changing state-voluntary sector relations, in particular since 1997, with the government zealously pursuing an agenda promoting voluntary sector engagement in service provision, albeit with mixed results. Of course, the involvement of the voluntary sector in service provision is nothing new. Since the mid-1980s, local authorities have seen their roles gradually changing to being one of enabler and facilitator rather than deliverer of community services. In the future their role might be reduced to primarily being a commissioner of services. The corollary of this is that, despite the net increase of funding available, it is likely that the voluntary sector will have to compete for this funding on a contractual basis. This new commissioning environment for voluntary sector organisations has repercussions in relation to equalities and the public sector duties to promote equalities.

## 1.2 Definitions

Many of the terms that are used throughout this guide appear in the equalities glossary which provides a more comprehensive set of definitions for key terms. However it seems expedient to provide some working definitions at the start of the document in order to guide and clarify thinking.

Firstly, the term voluntary sector generally refers to organisations operating for the public good and which are not-for-profit. Many of these groups are registered charities and some are very small and volunteer-run. We have targeted this guide to second tier organisations that is groups who are in the voluntary sector and who direct their services and resources to other organisations. An example of a second-tier group would be a CVS, the Women's Resource Centre or NCVO.

The equality strands that are referred to throughout the document include age, race or ethnicity, religion or belief, sexual orientation, gender and disability. There is scope to include other disadvantaged groups such as carers or ex-offenders within this guide. The fluidity of the strands is something very positive that recognises diversity, allows for difference and seeks equality of outcome for all. Traditionally, the equality strands have been seen as separate self contained entities. However, much work has been done to bring them together in a way which gives scope to combating multiple discrimination. Many organisations are also starting to acknowledge the importance of addressing 'minorities within minorities'; for example older LGBT people or disabled Bangladeshi women.

Currently public duty extends to public authorities who include: Central and Local government, Health Authorities, Primary Care Trusts, Police and Emergency Services, in some instances Housing Associations, Regional Development Agencies.

## 1.3 Equalities legislation

The table below (Table 1) summarises key equalities laws that have been passed over the last forty years. It is now generally against the law to discriminate against people on the basis of age, gender, ethnicity, disability, sexual orientation or religion in employment or services. As always, there are some key exceptions to the laws and this document should not substitute for legal advice. Along with these laws comes a duty by the public sector to promote equality specifically in relation to race, gender and disability, which can have a knock-on effect for organisations who are commissioned to deliver public services or who partner with public sector bodies. It must be noted that these duties extend just to the service or project organisations are delivering on behalf of a public authority and not to the whole organisation. Additionally, the Equality Bill is currently being debated which would bring together these laws into a single piece of legislation and would extend the public sector duties to all the equality strands. This proposed legislation may be passed into law in 2010.

**Table 1: a brief overview of legislation by equality strand.**

<b>Strand</b>	<b>Legislation</b>
<b>Overarching</b>	Equality Act 2006, Equality Act 2010
<b>Gender</b>	Equal Pay Act 1970 (amended) Sex Discrimination Act 1975 Sex discrimination (gender reassignment) regulations 1999 Part-time Workers Regulations 2000 Employment Act 2002 (Flexible Working Regulations) Gender Recognition Act 2004 Employment Equality (sex discrimination) regulations 2005
<b>Sexual Orientation</b>	Employment Equality (Sexual Orientation) Regulations 2003 Civil Partnership Act 2005 The Equality Act (Sexual Orientation) Regulations 2007
<b>Age</b>	Employment Equality (Age) Regulations 2006
<b>Disability</b>	The Disability Discrimination Act 1995 The Disability Discrimination Amendment Act 2005
<b>Race</b>	Race Relations Act 1976 (amended 2003) The Race Relations Amendment Act 2000 Racial & Religious Hatred Act 2006
<b>Religion</b>	Employment Equality (Religion or belief) Regulations 2003

When we talk about public duty we tend to think about public authorities that have a legal duty to promote equality of opportunity, eliminate discrimination and harassment and ensure good community relations. This currently covers the Race Equality Duty, Disability Equality Duty and the Gender Equality Duty. Legislation currently covers these three duties and they relate to the following legislative framework, which comprises of a number of separate pieces of legislation enacted over the past forty years:

- » Gender - Sex Discrimination Act 1975
- » Race - Race Relations Act 1976
- » Race Relations Amendment Act 2000
- » Disability - Disability Discrimination Amendment Act 2005

All of the above pieces of legislation can be found at the Office of Public Sector Information at [www.opsi.gov.uk/acts](http://www.opsi.gov.uk/acts).

### 1.3.1 Obligations for voluntary and community organisations

Organisations have a number of obligations in relation to equalities law as described below, however this document should not substitute for professional legal advice as to an organisation's obligations.

#### As an employer

Organisations should follow best practice when recruiting and hiring paid staff. This means that all roles should have a written job description and person specification. Requirements should be clear and specific.

- » For example; 'needs to reach and bend to pick items from shelves' is better than 'needs to be physically fit'
- » 'Needs to give clear information to clients by phone' is better than 'needs a good command of spoken English'

Application forms should ask whether a candidate has a disability as particular arrangements for the interview may need to be made, but questions of a personal nature – like marital status – should not be asked at application or interview stage. Promotion opportunities should be advertised to all staff, and all candidates should receive the same questions. All staff should have the same access to training – regardless of whether they are part-time or full-time. Training should be flexible for the whole workforce. Equality policies should state that any breaches will be dealt with through the disciplinary procedure. Employees are entitled to know how their pay is made up and women have a right to equal pay with men for equal work, both for full-time and part-time employees.

Organisations should have a clear management commitment to prevent unacceptable behaviour at work. A policy should define harassment and what it includes, and its effects whether intentional or not. Reasonable adjustments must be made to the working environment to give employees or potential employees with disabilities equal opportunities. This might mean providing an adequate, ergonomic chair or changing hours to ease travel to and from work. Where parents of children and carers of adults are entitled to apply for flexible working, organisations are obliged to give serious consideration to these requests.

All employees have statutory rights in relation to employment which include:

- » The right to a written statement of employment details
- » The right to be paid the National Minimum Wage
- » Protection from unlawful wage deductions
- » The right to paid holiday
- » Limits on working hours and
- » The right to join a trade union

It is a legal requirement for employers to monitor employees and potential employees' ethnicity, gender and disability status and best practice would suggest monitoring all the equality strands. When using monitoring forms, equalities data should be kept separate

from other identifying information such as name. Some organisations code equality monitoring forms so that they can be tracked anonymously for statistical monitoring in relation to recruitment.

### **Examples of good practice:**

- » Job adverts could state that you welcome applications from all sections of the community
- » Consider how different forms of flexible working can help maximise output, and possibly even improve services to clients, this could include job sharing, part-time working, flexible hours, home-working and annualised hours
- » An equal pay audit may help to make sure men and women are getting equal pay

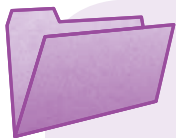
### **Providing services, facilities, education**

It is unlawful to discriminate in the provision of services. This is the responsibility of the whole organisation.



**Example:** a Housing Association refusing to rent a property to a particular person because they are gay, or think/perceive that they are gay.

Public bodies actively need to 'reach out' to groups to counteract race, gender and disability discrimination. They also need to monitor the impact of their policies and share the results publicly, and to make sure all staff are aware of their obligations. It can be lawful to treat some people more favourably than others if this is done to address discrimination or disadvantage in another area.



**Example:** A supermarket restricts use of the parking spaces nearest to its main entrance to disabled customers. This treats non-disabled customers less favourably but is likely to be lawful, since disabled customers would otherwise find it more difficult and time-consuming to access the supermarket's services.

In summary, an organisation wishing to deliver good equality practice would:

- » Have commitment to diversity and equality at the most senior levels of an organisation and demonstrate that equality and diversity is explicit in the organisation's mission statement and/or aims
- » Recognise that everyone is different in a variety of visible and non-visible ways
- » Have a culture and practices that recognise, respect and value difference
- » Have policies and practices in place which allow the diverse needs of service users to be met within a framework of respect, flexibility and dignity

- » Recognise the capacity of people who work in the organisation and provide an environment which facilitates learning and development.
- » Recognise and encourage talent and ensure it is appropriately used to meet the ambitions of the organisation
- » Ensure people who are part of the organisation feel that their views, input and suggestions are considered and taken into account
- » Recruit and retain staff and volunteers from the diversity that is most appropriate to the nature of its work
- » Ensure that all staff and volunteers have a good level of understanding and awareness of diversity and are clear on their individual role
- » Regularly reflect on the outcomes of the organisation's work

## 1.4 The Equality Act

*Please also see Appendix G - Equality Act 2010 Update.*

As of February 2010, an Equality Bill is being debated which will bring equality legislation together, strengthen the law and enable people to claim 'dual discrimination' more easily, in more than one equality strand. Proposed changes include:

- » New duties on public bodies
- » Widening the rights of older people
- » More regulations to ensure men and women get equal pay
- » Spreading equality through buying services
- » Enabling 'Positive Action'
- » Making 'discrimination by association' illegal
- » Better protection for disabled people through outlawing discrimination arising from a disability

Current legislation incorporates eleven separate acts and regulations including those named above which relate to current public duty.

The Equality Act 2006 introduced the gender equality duty, formed the Equality and Human Rights Commission (from April 2007) and made it unlawful to discriminate on the grounds of religion or belief in the provision of goods, facilities, services and education. Part three of the Equality Act 2006 enables provisions to be made to protect against discrimination on the grounds of sexual orientation in the provision of goods, facilities, services and education.

In February 2005 the government established the Discrimination Law Review to consider creating a clearer more streamline legislative framework by bringing together all existing legislation to form one consistent and coherent bill. The Equality Bill 2009 sets out the six equality strands covered by the legislation highlighted above. Additional duties such as the extension of positive action and the consideration of socio-economic inequalities

when making strategic decisions have also been highlighted in the bill. In short all legislation would be distilled into one single act creating a clearer legal framework for equality making it easier to understand and implement.<sup>1</sup>

If the Equality Bill becomes law, there will be an extension of public authority duty to include the six equality strands listed above, which may mean that EIAs will apply to all six strands. Best practice would suggest that public authorities should cover all protected characteristics regardless. Organisations delivering public services could face legal action if they are found to discriminate against certain groups around the delivery of services, so it is important for voluntary sector groups to distinguish between lawful and unlawful discrimination as many deliver targeted programmes.

Types of discrimination:

**Direct discrimination:** is treating someone less favorably than others in relation to employment, training, services, goods or facilities based on real or perceived identity including ethnicity, disability, gender identity, sexual orientation, age, religion, belief or gender. This type of discrimination tends to be obvious and explicit.

**Indirect discrimination:** occurs where the effect of general requirements, conditions or practices imposed by an employer or service provider has an adverse impact disproportionately on one group over another. For example stipulating that any new employee is over six feet tall would disproportionately disadvantage women or that uniform requirements include no head wear for employees would indirectly discriminate against Sikh men. There are situations where indirect discrimination can be justified, often in areas related to health and safety, for example if it is compulsory to wear hard hats on a construction site.

**Positive action:** allows organisations to use a number of methods such as providing training, policies or support to encourage underrepresented groups into certain areas of work or services. It is designed to help offset the impact of past inequalities and stereotypes. Organisations should establish which groups are underrepresented with data from the previous year. Positive action should not be confused with 'positive discrimination' (treating members of a certain group more favourably) which is unlawful. For example, an organisation might offer English language classes for minority ethnic women in a certain borough who want to start a business. The targeted training would be lawful assuming that evidence was available to show that minority ethnic women are underrepresented as entrepreneurs in that locality.

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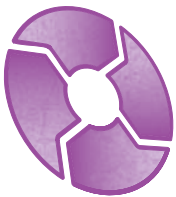
<sup>1</sup> The Equality Bill can be accessed at [www.publications.parliament.uk/pa/ld200910/ldbills/020/10020.i-v.html](http://www.publications.parliament.uk/pa/ld200910/ldbills/020/10020.i-v.html) or the Easy Read version can be accessed at [www.equalities.gov.uk/PDF/EasyRead\\_Equality\\_Bill\\_notes%20Low%20Res%20Web%20Acc.pdf](http://www.equalities.gov.uk/PDF/EasyRead_Equality_Bill_notes%20Low%20Res%20Web%20Acc.pdf).

Section 47 of the Sex Discrimination Act 1975 (the SDA) allows for the use of positive action in a number of specific circumstances. Sections 37 and 38 of the Race Relations Act 1976 allow an employer to give special encouragement and provide specific training for a particular racial group. This is very much where single sex provision is deemed lawful as it is providing positive action to reduce barriers and counteract the effects of past discrimination. Groups are encouraged to create positive action plans which include an analysis of underrepresented groups in employment and services. Positive action plans are only meant to be a temporary solution, and should be reviewed regularly. They should not be used if the under representation or particular need no longer exists.

## 1.5 Organisational standards, practices and planning

In order to be best equipped to take advantage of this guidance, there are a number of questions or issues that should be considered by the whole organisation:

- » Acknowledging that there is no set route in terms of achieving equality and diversity and the need for organisational leaders and stakeholders to develop goals, resources and commitments to the work
- » Being aware of the opportunities, barriers and limitations which may be set by the structures and environment in which the organisation operates
- » Understanding the need to monitor and evaluate the work of the organisation, not just in terms of outcomes but in terms of the process and methods used and embedding this into all areas of the organisation
- » Committing time to address issues related to equality and diversity with staff, volunteers, service users, trustees, partners and other stakeholders



The guidance provided within this document uses a four step framework to assist organisations. The four steps are as follows:

**Assess** – where is your organisation currently and what resources and information do you already have and know? Are there existing organisational champions of diversity?

**Plan** – developing intentions and goals for equalities work and preparing and mapping a way forward to achieve them.

**Act** – implementing the identified work, actions and information gathering needed to accomplish the goals.

**Review** – analysing and evaluating the work completed and making decisions as to future goals.

Each of these steps will be discussed in more detail in relation to Equality Audits and EIAs.

It is recommended that organisations complete a health check when embarking on equalities work because we have found that healthy and robust organisations are better equipped to achieve equality and diversity goals than are those with outstanding issues such as governance or management problems that have not been addressed. The health check (Appendix C) is designed as a basic checklist for organisations to ensure that policies and procedures related to governance, finance, management, health & safety and equalities are in place. It applies to organisations of all sizes and the results can be weighted based on small, medium or large organisations. If an organisation has ticked no to any of the questions, these areas should be examined for potential development before embarking on an equalities audit or EIA.

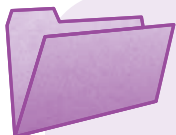
Additionally, organisations may have a quality mark related to equalities such as Investors in Diversity (IiD). This type of accreditation is an excellent tool to help prepare organisations for carrying out equality audits and EIAs. IiD also gives organisations the right framework and infrastructure in which to prepare for the Equality Bill. The areas to support compliance outlined above starts with best practice policies and procedures being put in place. IiD Level I could help small organisations get to grips with potentially large organisational shifts. Contact IiD for further information and how to carry out a baseline impact assessment on the equality, diversity and inclusion policies, practices and procedures. Without a baseline position it is difficult to assess the next steps. There are other standards that voluntary sector organisations could work towards and more information on these standards can be found in the Contacts section.

## 2. Equality audits

Many voluntary sector organisations have considered completing an Equality Audit which is an assessment of where the organisation is in terms of how it delivers and incorporates equality and is a great tool for organisations who have never reviewed or do not regularly review their position. An Equality Audit could include any aspect of the organisation's policies, procedures or services. The benefits of completing an Equality Audit might include:

- » An additional planning tool
- » An additional reporting tool
- » Income generation
- » Increasing staff management efficiency and effectiveness
- » As a quality management tool
- » To comply with the law
- » Understanding stakeholder attitudes and perceptions about equalities
- » As part of a requirement by a funder or partner

Each of the above areas are potentially valuable for organisations because it can increase the information that an organisation holds in relation to its people, policies, procedures and services. This information is often the basis for planning and decision-making that drives organisations forward and sustains them.



### **Example:**

Equalities monitoring of service users within an organisation may not only meet requirements by funders but may also help the group understand who they are reaching (and who they are not reaching) and how best to target future projects and resources.

In order for an equality audit to be most useful, an organisation has to take the time to develop a purpose and direction for this work. Questions to be asked at the start should include the following:

- » Why do you want to undertake an Equality Audit?
- » What do you hope to accomplish?
- » What particular areas or issues are you concerned with?
- » How much time and resources do you have to devote to this work?
- » Is there a particular person or team who will be responsible for implementing this work? Who else will be involved?
- » Are there particular timelines or other factors to be aware of?
- » Is this work endorsed by the governing body and leaders of the organisation?
- » Is there a commitment to involve all levels of the organisation in the work?

Each of the above questions should be addressed before starting work on an Equality Audit and a clear and transparent purpose and commitment should be agreed.



## Assess

This phase of the audit should include an initial assessment of the answers to the above questions and a review of the purpose and focus of the audit. The audit should take account of all potential sources of information, both internal and external, that the organisation currently has at its disposal. Examples of this could include monitoring information, evaluations, reports for funders, scoping exercises, away day notes and strategic plans. The group should complete the monitoring assessment in Appendix D. When reviewing the information that is currently available, groups need to decide what will be most useful and if there are any areas of information needed that are missing.

The assessment should also include information about staff time and resources for the audit and levels of support throughout the organisation. By this point, groups should have a clear understanding and agreement about the purpose of the audit, resources available and the specific scope of the audit. Organisations should know what parts of the organisation will be audited in terms of people, systems, policies or departments. This should be written up as concisely as possible and shared with the entire organisation.



## Plan

Building on the information collected in the previous stage, the planning stage should map out a workplan and timeframe for the audit. It should identify the following:

- » What areas of the organisation will be the focus of the audit? For example an organisation might target recruitment procedures or a particular department or all its policies.
- » Who specifically will be responsible for implementing the audit and who else in the organisation should be involved? Could a working group be formed that includes members of staff, trustees and other stakeholders?
- » What resources are available in terms of staff time, budgets, volunteers, etc?
- » Are there any training needs associated with carrying out the equality audit? If so, how and when will they be addressed?
- » How will staff be supported to carry out the audit?
- » What is the timeline for the project and each phase?
- » Are there any information gaps or needs that still must be identified? If so, where and how will these needs be fulfilled?
- » If time and resources are limited, activities and focus may need to be prioritised.
- » What specific and measurable questions and objectives will help to achieve the purpose? Is the plan realistic and achievable?
- » How will the results be reported and used?
- » What is the succession plan in the event that key staff leave before the audit is complete?

### Warning:



An equality audit can sometimes trigger unexpected management issues internally. The process may be a catalyst for staff to talk about related problems or conflicts they are experiencing or have experienced in the past. This should be anticipated as much as possible so as to minimise any disruption to the audit process.

The above questions should be synthesised into a written action plan for the equality audit and shared with staff, trustees and key stakeholders. A written plan and timeframe should also have some flexibility so that lessons learned within it can be incorporated into the plan and changes made. The support and assistance of everyone in the organisation will help to ensure that the audit is successful. The equality audit process takes time to carry out and organisations should give themselves plenty of time to do this. Many organisations take a year or more to complete an equality audit and rushing through is likely to get less useful results.



### Act

This stage involves implementing the audit according to the plan and timeline.

Depending on the particular focus, this might include:

- » Designing survey questions, focus groups or interview questions
- » Gathering organisational publications and materials
- » Doing an online survey
- » Having one to one meetings or interviews with staff, service users, trustees, members or volunteers
- » Gathering external statistics about areas of focus or local communities
- » Analysing the information collected and making recommendations for action
- » Writing the results of the audit, sharing these results and consulting with stakeholders about the results

The results and recommendations should form the basis of an action plan for the following one to three years.



### Review

When the previous stages are complete, the organisation should review the audit process, its strengths and weaknesses and decide if and how it would like to carry on its equalities work. Particular questions may include:

- » What did we learn from the audit?
- » What could be changed as a result of the audit?
- » What recommendations have come out of the audit?
- » What lessons were learned in the process?
- » Were the methods used helpful in achieving the goals?
- » Did we leave enough time to conduct the audit?
- » Did we have enough resources to achieve our intended results?
- » What would we do differently if we had to do this over again?

- » Would other areas of the organisation benefit from a similar process?
- » Did staff have enough support to carry out the audit?
- » Did we engage the entire organisation in the process?
- » Did the audit have enough 'buy-in' from organisational leaders?
- » Was the organisation adequately prepared for the process?
- » Did any organisational issues or problems arise within the audit process?
- » Did the audit highlight any areas of the organisation that need additional development or support?
- » What are the appropriate next steps?

## 2.1 Equality audit tools

### *Mapping – stakeholder mapping, diversity mapping*

Mapping is a way of recording information which can help to understand current organisational situations and needs. If organisations want to be in touch with the diverse needs of the communities they serve they need to gather evidence so that services can be directed effectively and efficiently and stakeholders understand why a course of action is being taken. Below is guidance describing mapping of organisational stakeholders and diversity mapping.

Stakeholder mapping or stakeholder analysis are the terms used to describe a process where individuals or organisations are identified which are likely to be affected by a proposed action. Groups and people are identified and then sorted by factors such as how much the action might affect them. The information from the mapping is used to analyse how the interests of those stakeholders should be addressed in a service, project plan, policy or other action. A stakeholder is any individual or organisation who could be positively or negatively impacted by or cause an impact on the actions of an organisation. Examples of stakeholders could be service users, members, clients, trustees, volunteers, funders, staff, partners or the local Council.

Diversity mapping is a process of assessing the diversity of stakeholders within an organisation. Once stakeholders have been identified, mapping the diversity of one or all of the groups can help organisations to understand how diverse they are and if they are representing target groups effectively. This information can be compared to the vision, goals or targets set by organisations in terms of communities they aim to serve.

### **How?**

Identify specific communities that the organisation aims to serve. Are they defined geographically, by equality strand or by an issue or interest area? Then 'map' all the various stakeholders in relation to the organisation – anyone who has an interest in helping the organisation achieve its mission. This process will require a change of time and ideally will involve a variety of people working together to agree the list such as staff, trustees,

volunteers and service users. This process could be completed as part of a staff meeting or at a strategic away day. Try to give examples for each group of stakeholders identified.

When mapping diversity, start with the communities and stakeholders that have been identified in the previous step. Then for each stakeholder group, think about each equality strand and what community the individuals or organisation might represent. Try to be as specific as possible. For example, a membership organisation such as a CVS might be thinking about its member stakeholders and map the diversity of those organisations by equality strand. So organisations that are run and led by and for the BAME community might be mapped by race and women's organisations might be mapped under gender and organisations for people with learning disabilities might be mapped under disability. After looking at the entire membership, an organisation could create a 'map' that shows the diversity of its membership. This process could be done with only one stakeholder group such as service users or with all the stakeholders, depending on the time and resources available. The Olmec Guide's diversity wheel can provide ideas for other kinds of characteristics that might be included in the mapping<sup>2</sup>. Try to also think about layers of identity and the fact that most people have numerous kinds of identities, for example being Asian, a lesbian, a young person and Sikh. Diversity mapping should be done with a group of people who know the organisation and its stakeholders and can be enhanced by gathering evidence and facts about the stakeholders. For example, by monitoring or surveying the diversity of staff, trustees, volunteers, members and service users an organisation would already have generated the information needed to create a diversity map. The diversity map can be compared to the vision, mission and goals of the organisation to assess how representative the organisation is in comparison to the communities it aims to serve.

## Challenges

The challenges involved in mapping include the following:

- » Finding the time to get a group together to brainstorm and develop the maps – most organisations are already under huge time pressures and sometimes see this work as 'extra' or the kind of work that they would do in an 'ideal world'.
- » Involving a variety of people in the process – many organisations do not spend the time to involve a variety of stakeholders in the process but instead use the tools among a small group of staff or senior leaders. By doing so, organisations run the risk of missing key information and knowledge that would be available from a larger and more varied group.
- » Lack of information or facts about stakeholders and communities – some organisations either do not do any monitoring of any stakeholders or simply do not know how or where to access minority communities or groups. Without a conscious effort to overcome the lack of knowledge, this can become a vicious cycle where stakeholders lack diversity and reinforce the identity/ies that they represent.

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2 Lloyd, S. (2008) A Guide to Equality and Diversity in the Third Sector. OLMEC, page15.

## 3. Equality impact assessments

An equality impact assessment (EIA) is a tool to identify whether or not strategies, projects, services, guidance, practices or policies have an adverse or positive impact on a particular group of people or equality strand. For the purpose of this report, the word 'policy' will mean any strategy, project, service, guidance, practice or policy of the organisation. Policies could be written or unwritten and can be formal or informal. This includes strategies, guides, manuals and common practices. This can relate to projects, services and functions of organisations and covers service delivery and employment practices. The key part of the process is to examine and identify any organisational barriers, acts or omissions that detrimentally impact individuals and communities because of race, gender, age, religion or belief, sexual orientation or disability. EIAs also include looking for examples of positive impacts as well as to detect actual or potential negative impacts on equality groups. Public bodies have a statutory obligation to consult with communities that may be impacted by their policies and organisations that deliver services on behalf of public bodies may be required to assess impact as well.

There can be no one toolkit or guide that will get organisations to undertake an EIA, so it is important to implement the practices as part of a holistic organisational approach. The core purpose of EIAs is to help organisations to identify gaps and issues and put in place corrective actions to see positive changes. It is important for voluntary sector organisations to use this process as part of its cyclical review of strategies, policies, projects and services. There are a variety of ways to assess impact but the most important aspect is putting the lessons learned into practice.

### 3.1 Why do it?

EIAs are often seen in the context of the public sector duties to promote equality of opportunity, reduce discrimination and ensure good public relations. The specific requirements to undertake an EIA falls to public bodies such as the local and central government, NHS Trusts, Primary Care Trusts, schools, colleges and universities and the emergency services where they have general and specific duties to ensure equality of opportunity. The needs of equality groups must be taken into consideration by these bodies and is essential for effective service delivery.

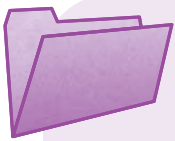
EIAs are essentially about improving equality performance. Undertaking an EIA will enable an organisation to identify the impact of its current activities and in turn remove or reduce barriers to equality groups or minorities. Other benefits include the fact that organisations undertaking them can highlight to stakeholders that equality of opportunity is a priority and is being addressed. By undertaking an EIA an organisation can:

- » Improve quality by helping to improve the services delivered and identifying where improvements are needed and taking appropriate actions;
- » Improve planning by adding vital information to the strategic or business planning process and using the results to develop equality objectives and targets that become

part of operational work plans;

- » Improve reporting and transparency by sharing information with stakeholders;
- » Become a better employer by identifying the needs of different groups of employees and making changes as needed;
- » Enable the Local Authority or other public sector commissioners to fulfil the wider 'General Duty' under the law to promote good community relations and equal opportunities and combat unlawful discrimination and
- » Improve sustainability and potential for income generation by increasing the quality and taking the above actions.

There are many equality and diversity tools to help organisations implement effective policies, procedures and projects and it is important from the outset to distinguish between these areas. An organisation can undertake an organisational EIA, which looks at equality, diversity and inclusion policies, practices and procedures. EIAs are about legal compliance and will help organisations assess existing policies and help identify gaps in policies and procedures especially in light of the Equality Bill. EIAs can also be carried out when developing and delivering new projects or services. If an organisation wants to assess the relevance of equality and the degree of its relevance to a new project, information about the needs of different groups of people targeted are important.



#### **For example:**

If you intend to run a women only training programme you will need to take into account certain considerations such as care responsibilities and religious needs. By listening to the intended target groups, the timetable can be developed to incorporate late starts, early finishes or time for religious prayer. By taking these into consideration you avoid beneficiaries missing out on vital elements of the project and reduce the number of potential early leavers.

If you run a small voluntary sector organisation and are looking at developing sustainability strategies which include the delivery of public sector contracts or commissions, or if you are just interested in using some of the EIA tools and techniques, the best way to get started would be to consider developing the following:

- » Organisational health check
- » Baseline equality audits of policies and procedures
- » Diversity mapping – to develop an understanding of stakeholder groups
- » Service user engagement and satisfaction – such as through a basic complaints process or evaluation of the service

These techniques are detailed throughout the guide and can help organisations be in a better position to establish and implement best practice in relation to equalities.

For additional support, groups can contact organisations such as the National Centre for Diversity, which offer a range of support services to help small voluntary sector organisations raise standards without undergoing a full EIA. The National Centre for Diversity can help organisations create a baseline equality and diversity impact assessment or to identify gaps in current policies and procedures and introduce improvements. The Women’s Resource Centre may be able to offer help and assistance. A more complete resource list of organisations can be found under ‘Useful Contacts’ in section six.

For most voluntary sector groups, undertaking a full EIA is unnecessary however if delivering a public service on behalf of a public authority, these duties may be passed onto service providers in the Third Sector. There are often contractual obligations for service providers to contribute to EIAs and is seen as best practice for the voluntary sector at a minimum to understand EIAs and implement some of the practices in relation to equality duties.

### **3.2 Public sector duties and contractual obligations**

Equality legislation in the UK has been placed at the centre of public service delivery and it is the duty of public authorities to ensure that communities are treated fairly and can access public sector services whether they are delivered directly through the public bodies or through the private or voluntary and community sector. For example, when a local authority has a contract or other agreement (such as a grant) with a voluntary sector organisation to carry out a service, the duty to promote race equality applies to these functions. The local authority remains responsible for meeting the duties that apply, and therefore usually has contractual arrangements in place. Sometimes these duties are incorporated into the performance or monitoring requirements for the delivery of the service (e.g. a contractor is required to monitor service users by racial group, gender or disability). In addition, local authorities may promote race equality by encouraging contractors to draw up policies that will help the contractor to avoid unlawful discrimination and promote equality of opportunity.

Public authorities have a legal duty to promote equality of opportunity, eliminate discrimination and harassment and ensure good community relations. Organisations that are currently delivering public sector contracts will understand that these duties filter down to them and they will be expected to promote equality. These duties will affect voluntary and community sector organisations most directly if: -

- » They are considered a public authority (e.g. a Housing Association)
- » Where they deliver services on behalf of a public authority

However, many organisations have equality and diversity at the heart of service delivery and are continuously working towards best practice and as far as possible implementing equality and diversity. Organisations delivering such services or projects will often have

'Service Level Agreements' which are a type of contract that usually have a clause outlining this duty. Figures one and two give examples of contract language from public sector bodies.

**Figure1**

### **Clause in Local Authority Service Level Agreement**

#### **10. EQUAL OPPORTUNITIES AND ANTI DISCRIMINATION**

**10.1** The Delivery Agent must comply with the provisions of the Sex Discrimination Act 1995, the Race Relations Act 1976 as amended by the Race Relations Amendment Act 2000, the Disability Discrimination Act 1998, the Human Rights Act 1998 and any enactment modifying or replacing them.

**10.2** The Delivery Agent shall adopt an Equal Opportunities Policy relating to all aspects of employment and service provision. This will include a Statement of Intent, Code of Practice and Procedure, and timetable for implementation and review. For the purpose of the above legislation, the Delivery Agent shall be treated as if it is a body to which the legislation applies.

**10.3** The Delivery Agent shall observe as far as possible and, to the reasonable satisfaction of the LBTH, follow the practical guidance, recommendations and advice contained in the Code of Practice for the Elimination of Racial Discrimination, and the Promotion of Equal Opportunity in Employment issued by the Commission for Racial Equality pursuant to Section 47 (1) and (7) of the Race Relations Act as amended. In particular, but without prejudice to the generality of the foregoing, the Delivery Agent will operate an Equal Opportunities Policy that complies fully with the practical guidance, recommendations and advice contained in paragraphs 1.1 to 1.3 inclusive, of the said Code of Practice.

Figure 2

## Clause in Regional Development Agency - Service Level Agreement

### 16. Equal Opportunities

- 16.1** As a manager, employer and provider for services and/or supplies, the Contractors shall do all they reasonably can to seek the elimination of all forms of discrimination in their employment practices, management and provision of their services in relation to sex, race, religion, disability and sexual orientation in accordance with their established equal opportunities policies.
- 16.2** The Contractors shall provide a copy of each of their equal opportunities policies to the LDA upon request and such policies shall provide that there be no unfair discrimination on the grounds of sex, colour, race, religion, nationality, age, disability, sexual orientation or any other unjustifiable basis in the operation of the Contractors business including the selection of suppliers partners and consultants.
- 16.3** In the event of any judicial or other official finding of unlawful discrimination by the Contractors, the Contractors shall take all reasonable steps to prevent a repetition of the unlawful discrimination and shall provide details of those steps to the LDA upon request.
- 16.4** In the provision of the services the Contractor shall ensure that their staff behave with courtesy and respect to everyone regardless of sex, religion, race, disability, age and sexual orientation.
- 16.5** The Contractor shall provide such information as the LDA may reasonably request for the purpose of assessing the Contractors compliance with this clause 16 and any failure to comply shall be breach of the Contract for the purpose of entitling the LDA to terminate the Contract.

Organisations that do not deliver public services can still engage with the process by defining their own target groups and holding public sector bodies accountable to the community. Many local authorities, for example, have a range of statistics and information they have collected through research or projects they have commissioned or delivered. They may have Equality Schemes that ensure they manage their duty and often state how they have engaged equality groups in the development and delivery of their programmes. There may be useful information here for organisations in the voluntary sector. Local authorities should publicise any EIAs they have completed which may help organisations to look at their own delivery or challenge the public authority if they have not produced impact assessments which include communities they represent.

### 3.3 Using EIA to lobby for improvements

Carrying out an EIA can also be undertaken by the voluntary and community sector on specific projects, policies and functions to lobby for improvements. Using the Health Rights of Women's Assessment Instrument<sup>3</sup>, we can demonstrate how an EIA or similar tool such as the Human Rights Assessment Instrument (as it is known in this example) can be used to improve the impact of a policy and create an action plan to lobby for the adoption of recommendations and to raise awareness about key findings within the analysis.

The purpose of this example is to help voluntary and community sector organisations formulate strong arguments which can be used to lobby Governments and public authorities that have a duty to promote equality of opportunity. In this example the issue of women's health is used, but is transferrable and can be used for any equality issue. This instrument is particularly useful for single equality organisations (e.g. women's groups, faith groups, or BAME groups) that want to establish a strong argument for why they are running single equality services. Using this tool, organisations can work through six stages to reach key recommendations and actions for lobbying.

Organisations can also request copies of impact assessments undertaken by public authorities on any of the equality strands that fall under their duties. This can be used to assess compliance and also to see if they have covered all the necessary issues that impact on equality groups. Voluntary and community sector organisations that use the tools for impact assessments such as equality mapping, monitoring and consultation information can feed their findings into public authority proposals. In cases where public authorities are not sufficiently aware of any impacts of potential policies, organisations should consider lobbying the public authority. For example the European Commission sets minimum guidelines for consultation so if an organisation has reviewed European policies on Human Rights and feels that the Commission has not used these guidelines correctly you have a case to lobby for non-compliance<sup>4</sup>.

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3 Aim for Human Rights (2008), *Health Rights of Women Assessment instrument*, Utrecht.

4 Commission of the European Communities (2002). *Towards a reinforced culture of consultation and dialogue - General principles and minimum standards for consultation of interested parties by the Commission*, Brussels.

There are also ways to get additional support and partners for lobbying such as from larger regional or national umbrella bodies such as National Association for Voluntary and Community Associations (NAVCA), London Voluntary Services Council (LVSC), National Council for Voluntary Organisations (NCVO), Women's Resource Centre, the Consortium for LGBT Voluntary and Community Organisations and the Equality and Human Rights Commission (EHRC). A more complete list of organisational resources can be found in the Contacts section.

### 3.4 Conducting an EIA

Gathering information by monitoring and setting performance targets is the basis for much of the EIA. This information helps inform organisations and public authorities about what they need to do better and what they are delivering well in relation to equality impacts. Some of the key concepts involved in assessing impact are defined below.

- » **Intended impacts** – these include the objectives and desired outcomes from organisational plans and intentions related to how they will affect different sections of the community. For example, the purpose of the Hate Crime Policy and Procedure is to provide a sensitive and supportive service to victims and witnesses of racist or homophobic harassment and discrimination and to ensure the alleged perpetrators are dealt with appropriately.
- » **Unintended impacts** – these could include any 'institutional barriers', acts or omissions that could have a detrimental effect for certain sections of the community. For example, mental health services which provide counselling to service users but have no provision for doing so in community languages.
- » **Negative impacts** – where any potential for negative impact has been identified organisations should consider making changes. If the negative impact would amount to unlawful discrimination, organisations **must** make changes to the proposal unless there is an objective, lawful reason to justify it.
- » **Positive impacts** – this includes areas of potential or actual benefit for a particular equality group rather than any broad positive impacts of the policy overall (e.g. a recruitment and selection guidance policy that states that organisations will interview all disabled job applicants who meet the minimum criteria for a job vacancy).

Organisations delivering services on behalf of public bodies where some or all of the 'public duty' obligations are transferred have a clear need to **promote equality of opportunity** between equality groups. For example, a service delivery organisation in Islington might ask if women from the Somali community have the same chances of accessing promotional information, employment opportunities and services within the organisation. There is also the obligation on organisations to **eliminate discrimination** that is unlawful, whether it is direct discrimination or indirect discrimination.

An assessment of all equality groups should be carried out to ascertain if any group is being treated less fairly than others because of certain practices or functions that might inadvertently act as barriers.

The **promotion of positive attitudes and community cohesion** is also part of the public sector duties. Community cohesion is the process of creating a community of shared values, shared challenges and equal opportunities. The Local Government Association and Home Office definition<sup>5</sup> of a cohesive community is one where:

- » There is a common vision and sense of belonging for all communities
- » The diversity of people's different backgrounds and circumstances are appreciated and positively valued
- » Those from different backgrounds have similar life opportunities
- » Strong and positive relationships are being developed between people from different backgrounds in the workplace, in schools and within neighbourhoods

This could include work that is being done by organisations to bring groups together from various equality strands and work to engage all stakeholders in decision making around projects, policies or services. When thinking of developing project proposals it is important that they are designed around the fullest understanding of the different needs of communities. The main tools and techniques for EIAs will be based on good quality information and evidence collected through mapping, monitoring, research and consultation.

### *EIA Steps and Stages*

The following steps provide guidance for organisations when considering or conducting an EIA. These steps provide general guidance and the template provided in the Resources section provides specific guidance which compliments these stages and forms the structure of the EIA report.



### **Assess**

Initial screening should take place for new and revised policies, strategies, procedures and services. This stage should be completed at the earliest opportunity or annually and can determine whether or not it is necessary to carry out an EIA for the area of activity. In order for an EIA to be most useful, an organisation has to take the time to develop a purpose and direction for this work.

The key questions that need to be assessed at this stage are:

1. What is the purpose of the EIA and what do you hope to accomplish?
2. Is the EIA required as part of service delivery arrangements with public sector funders?
3. How much time and resources do you have to devote to this work?
4. Is there a particular person or team who will be responsible for planning and implementing the EIA? Who else will be involved?
5. Are there particular timelines or other factors to be aware of?

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<sup>5</sup> Local Government Association, 2002, Guidance on community cohesion, London.

6. Is the EIA endorsed and understood by the governing body and leaders of the organisation?
7. Is there a commitment to involve all levels of the organisation in the EIA?
8. Who do you expect to benefit from the policy?
9. Does the activity have the potential to cause adverse impact or discriminate against groups in the community?
10. Does the activity make a positive contribution to equalities?

Define project aims, objectives, outputs and outcomes in terms of how they meet needs you have identified in the community or by benefits and outcomes you intend to deliver. This should include the details of any equality policy objectives in each stage of the project. Each of the above questions should be addressed before starting work on the EIA.

The EIA should also include information about staff time and resources for the process and levels of support throughout the organisation. By this point, organisations should have a clear understanding and agreement about the purpose of the EIA, resources available and the specific scope. This should be written up as concisely as possible and shared with all stakeholders.



## Plan

Building on the information collected in the previous stage, the planning stage should map out a workplan and timeframe for the EIA. It should identify the following:

1. What specific policies or service areas will be the focus of the EIA?
2. Who specifically will be responsible for implementing the EIA and who else in the organisation should be involved? Could a working group be formed that includes members of staff, trustees, community representatives and other stakeholders?
3. What resources are available in terms of staff time, budgets, volunteers, etc?
4. Are there any training needs associated with carrying out the EIA? If so, how and when will they be addressed?
5. How will staff be supported to carry out the EIA?
6. What is the timeline for the project and each phase?
7. Are there any information gaps or needs that still must be identified? If so, where and how will these needs be fulfilled?
8. If time and resources are limited, scope and focus may need to be prioritised.
9. Is the plan realistic and achievable?
10. How will the results be used and who will you share them with?
11. What is the succession plan in the event that key staff leave before the EIA is complete?
12. Agreements regarding performance management and monitoring arrangements to track actual performance against forecasted equality objectives and targets.



### Warning:

EIAs can sometimes trigger unexpected conflicts. The process may be a catalyst for service users or others to talk about related problems or conflicts they are experiencing or have experienced in the past. This should be anticipated as much as possible so as to minimise any disruption to the process and conflict management strategies or mediation techniques may need to be considered.

The above questions should be synthesised into a written action plan for the EIA and shared with staff, trustees, partners and other key stakeholders. The support and assistance of everyone in the organisation will help to ensure that the EIA is completed. The EIA process takes time to carry out and organisations should give themselves plenty of time to do this. Many organisations take a year to complete an EIA and rushing through is likely to get less useful results.



### Act

This stage involves seeking views through consultation on the likely impact of the proposed policy and deciding how potentially negative impacts could be mitigated as well as whether the proposed policy will promote equality of opportunity and good community relations. This stage should be carried out according to the agreed workplan created in the previous stage. Depending on the situation, this might include:

- » Designing survey questions, focus groups or interview questions
- » Gathering organisational publications, monitoring materials, evaluation results and complaint records
- » Doing an online survey
- » Having one to one or small group meetings or interviews with staff, service users, trustees, members, volunteers or community groups
- » Gathering external statistics about areas of focus or local communities
- » Analysing the information collected and making recommendations for action
- » Writing the results based on the report template and sharing these results with stakeholders

Once data has been collected on quality, outputs and outcomes then it must be analysed. This review process should include looking closely at the equality objectives and comparing actual performance against targets and indicators. The range of information collected through routine monitoring should be reviewed, analysed and interpreted. The monitoring data used in the review process could include the following information filtered by any or all equality strands.

- » Number of beneficiaries accessing each service
- » Number of 'completers'
- » Number of 'early leavers'

- » Number of qualifications received
- » Number of job outcomes
- » Number of advice sessions completed
- » Number of complaints received

The analysis at this stage needs to look at the interpretation of the data and level of commitment from the organisation for continuous improvement and participation. Once a project has nearly finished or has ended, an assessment which includes the following questions would be helpful:

- » Do beneficiaries still need what the project is designed to offer?
- » Have other programmes been developed that are better or more cost effective in relation to current needs and from which you can learn or refer?
- » Should the programme be maintained, modified, replaced or discontinued?

These questions require critical management feedback and decision-making involving organisational leaders before actions are finalised.

Where performance has been shown to be unsatisfactory it is important to find out why before action planning and implementation of remedial actions and it is important to seek feedback from service users to ensure positive impacts will be achieved with actions. Where performance is good it is equally as important to highlight the reasons and share good practice with others.

Using the information and evidence gathered so far, the final part of this stage involves completing the report and action plan template (in the Resources section) and sharing the information with staff and key stakeholders. Ideally organisations should not be bound by templates and should incorporate their own style and the techniques in the EIA process and tools described.



## Review

When the previous stages are complete, the organisation should review the EIA process, its strengths and weaknesses and decide how it would like to carry on its equalities work. Particular questions may include:

- » What did we learn from the EIA?
- » What could be changed as a result of the EIA?
- » What recommendations have come out of the EIA?
- » Were the methods used helpful in achieving the goals?
- » Did we leave enough time to conduct the EIA?
- » Did we have enough resources to achieve our intended results?
- » What would we do differently if we had to do this over again?
- » Did staff have enough support to carry out the EIA?
- » Did we engage all relevant stakeholders in the process?

- » Did the EIA have enough 'buy-in' from organisational leaders?
- » Was the organisation adequately prepared for the process?
- » Did any organisational issues or problems arise within the EIA process?
- » Did the EIA highlight any areas of the organisation that need additional development or support?
- » What are the appropriate next steps?

### **3.5 EIA tools and examples**

#### *Key Performance Indicators*

Key Performance Indicators (KPI) are quantifiable measurements, agreed beforehand, that reflect the critical success factors of an organisation. KPIs must reflect the organisation's goals, they must be key to its success and they must be measurable. They are usually long-term considerations. The definition of what they are and how they are measured does not often change. The goals for a particular KPI may change as the organisation's goals change or as it gets closer to achieving a goal.

KPIs are usually set after research and consultation have occurred. For example, Tower Hamlets in London has a large percentage of young people within its population and KPIs for many projects in the borough include targets for young people. If an organisation is running a project on behalf of social services or the Primary Care Trust (PCT) for example, KPIs are usually agreed at the time of contract negotiations.

Using organisational data sources and information gathering as described above, EIA practitioners can set performance targets such as:

- » Number of young people trained
- » Number of women into employment
- » Number of BAME people advised
- » Number of BAME people with improved health
- » Number of disabled people accessing the service

A further example of a KPI is described below.

**Figure 3: KPI example**

<p>KPI 1 - Increase local service capacity for people who misuse drugs, alcohol and other substances in line with stated priorities in local/regional commissioning plans in respect of:</p> <ul style="list-style-type: none"> <li>» <b>open access services</b>, including the provision of advice and information about drug and alcohol misuse, needle exchange services, assessment and care management, and outreach services to members of the community especially those that are hard to reach;</li> <li>» <b>structured community based services</b>, including structured day care and community and specialist prescribing and</li> <li>» <b>residential and inpatient</b> care targeting all members of the community.</li> </ul>	
<b>Rationale</b>	<p>Service capacity is an important and relevant performance indicator and a key priority of the public authority in relation to building additional treatment places. People who misuse drugs, alcohol and other substances and who seek or are referred for support and treatment should have reasonably easy access to the appropriate service, this includes members of hard to reach, and isolated communities.</p> <p>Commissioning plans, as with other health services, need to be underpinned by a comprehensive analysis of the need for services, and include measures to address any shortfall in service, specifications for services framed in terms that are relevant to treatment modality, and measures to monitor and evaluate those services. The performance indicator is expressed in terms of progress towards local targets for meeting assessed need for care, assuring scope for local decisions about investment, and clarity about pace, scope and direction of change.</p>
<b>Implementation</b>	<p>This indicator is primarily for Community Support Projects who have the statutory responsibility to tackle substance misuse at the local level. Local commissioning plans should describe the assessed need for services in each of the three categories, in terms relevant for each intervention (for example, treatment slots, day care places, rehabilitation or detoxification bed, service provider per head of population or geographical area); and the investment it will make in each service. Plans should also differentiate between services for alcohol and drugs and where relevant, between types of drug services (e.g., opiate and stimulant misuse services). Service Level Agreements or contracts should reflect local targets for meeting the assessed need.</p>
<b>Data Source</b>	<p>CSP substance misuse commissioning strategies and plans and service improvement and expenditure plans.</p>

## Consultation

Consultation is one of the key elements to carrying out a meaningful EIA. It is imperative to hear the views of all sections of the community who may be affected by the policy, including staff, trustees, volunteers, service users and non-service users. If no previous or recent consultation has taken place, it is important to consult with key stakeholders as part of the EIA process, especially with any groups who may experience a potential negative impact. This could be a 'snapshot' survey or an informal consultation session or it could involve more formal consultation processes such as focus groups, Pinpoint facilitation sessions, larger consultation events or web based consultation. Best practice would dictate, as far as possible, to undertake a full consultation exercise to assess potential impact, especially if carrying out services on behalf of a public sector body. Different methods of consulting are more effective for some groups than others and consideration needs to be given as to when and where consultation will take place and which tools will be employed.

### What is consultation?

Consultation is a set of methods used by an organisation for gathering opinions, feedback and ideas from specific stakeholder groups. It can be used with small groups or large groups and may be more formal or very informal. Many local councils are expected or required to consult people about services such as community plans, local area agreements or health and social care services.

The purpose of consultation is to elicit and gather opinions, feedback and ideas from the public. Consultation is a platform from which to promote the exchange of ideas, perspectives and experiences. It gives people access to decision making.

### How?

Consultation is often a key aspect of completing an EIA and organisations should set time aside to meet with members of the community and discuss their needs where they are based, using community languages if necessary. Find key individuals or organisations that have access to the communities being consulted. Use them to find out from their own research what the community needs are. Use these sources of information to find out about how the community is organised and shaped, what resources the community has and the particular requirements it may have, such as interpreters, crèche facilities or disabled access.

- » Think carefully about the type of consultation that will be used and the kinds of questions that will be asked
- » Will it be necessary to consult with a large number of people or will a range of small groups be sufficient?
- » Who should be targeted for consultation and how can they be reached?
- » Develop and test a range of questions that will enable the gathering of necessary details and record information about community concerns, needs and opinions about the organisation and its policy or services

- » Capture people's ideas and thoughts as much as possible in their own words, perhaps by recording the session on audio or video or in writing
- » Give participants time to engage with the issues and to formulate their ideas in a variety of ways

Organisations can consult with people on particular issues, by locality or within specific equality groups. For instance, you may want to consult young people about employment and training or BAME communities on access to health and social care services. Be sure to allow time and resources for recruiting participants and publicising the consultation. Give participants plenty of notice, think about comfort and access needs at the venue, have refreshments available and plan the consultation at times and locations that are most convenient for participants (not necessarily for organisations or staff).

## Challenges

Consultation methods, while potentially a fantastic way to understand community needs, can also have a number of challenges for organisations. Keep in mind the following and try to develop strategies to prevent or minimise the challenges.

- » Many organisations often only get the 'usual suspects' contributing to consultations and may miss important views from other communities or people who are more difficult to reach
- » Resource and time constraints can prevent consulting as widely as possible.
- » Some communities experience 'consultation fatigue' which can be exacerbated by difficulties obtaining feedback and in demonstrating any outcomes that are tangible to the community
- » Organisations may encounter a groundswell of opinion that they are not equipped to deal with or do not have the capacity to respond to
- » Communities can be quite cynical and may believe that organisations have already determined the outcome and the consultation is just a 'rubber-stamping' exercise
- » Organisations may have a lack of awareness of new or emerging issues in communities or of newly arrived groups and how to reach them
- » Preconceived ideas about the needs of the community and the best response can stop organisations from asking useful questions

## How do you know it has worked?

If a consultation method has been used, an organisation should ask itself the following questions to assess its success:

- » Did a wide range of people (or all target groups) have access to the consultation and were they able to participate?
- » Did the consultation generate enough high quality information in relation to the policy or EIA questions?
- » Were communities engaged that were not previously involved?
- » Did participants refer the organisation to others who might be helpful?

## 4. Resources

Earlier we mentioned some of the tools and techniques that form the basis of equalities work and information gathered from these methods can contribute or feed into this work. In some instances public authorities approach voluntary and community sector organisations that engage well with equalities groups to share information, which may help them improve services.

This section details a number of resources, checklists and templates that have been introduced in the guide and includes guidance on the following:

- » Data collection
- » Sampling and storage
- » Monitoring
- » Focus groups
- » Question design
- » Data analysis
- » Conflict management
- » Reporting

### 4.1 Data collection guide

The collection of data, or information, is central to any research project and is also the crucial element to completing an equality audit or an EIA. Any type of research, whether large or small scale, should start with answering the following questions:

- » What do you want to accomplish?
- » What questions are you trying to answer?
- » What resources and capacity do you have for the research?
- » Is the collection of information a priority for the leaders and decision-makers of the organisation?
- » Do you want to collect quantitative or qualitative data?
- » Which survey instruments make sense to use for your needs?
- » Have any ethical issues been addressed?
- » Who will you be sharing the information with?

While there are many types of instruments for collecting data, the following tools for gathering information are more commonly used by organisations:

- » Surveys or questionnaires
  - Online
  - Telephone
  - Face to face
  - Postal

- » Case studies
- » Interviews
  - Face to face
  - Telephone
- » Focus groups
- » Consultation events
- » Self completion monitoring forms
- » Complaint forms
- » Diaries
- » Observation

Information can help organisations paint a picture of their current service provision and the potential implications this service may have on equality groups. The particular sources of information used by organisations will vary depending on the needs of the organisation and may include internal or external data, secondary sources of information or existing data held within organisations. Some common examples of the types of data used by organisations are below:

- » Reports to funders
- » Evaluations of projects or services
- » Service monitoring reports
- » Client satisfaction surveys
- » User feedback and satisfaction reports
- » EIAs conducted elsewhere on similar policies (such as from public sector bodies)
- » Workforce monitoring
- » Staff surveys and information from trade unions
- » Contract monitoring reports
- » Complaints and comments from service users
- » Press coverage
- » Feedback from focus groups
- » Feedback from individuals or organisations representing key target groups
- » National and local statistics (such as the census)
- » Information from formal audits

Collecting information is more than monitoring, it is about creating systems and tools that are appropriate for the needs of the organisation and its stakeholders. Organisations must carefully choose the right tool for the situation and test the methods and instruments on a small sample so as to adjust questions and methods accordingly.

It is vital to monitor our policies and procedures continuously to ensure they are not having any adverse impact on people from different groups. Organisations collect data and monitor for a number of reasons. The use of data is described below.

- » **Planning tools:** monitoring can be a fantastic planning tool to help target new communities for involvement or to strategize for future projects or outreach needs.

Planning is most successful when an organisation has monitoring data or feedback that details where gaps in service provision or needs might be and how the organisation has achieved previous targets or goals.

- » **Reporting tools:** every organisation is accountable to someone and most are required to report to others about the activities of the group. Reporting to stakeholders might include governing body documents, notes for staff meetings, briefings for volunteers, newsletters to members, reports to funders, announcements on websites or press releases for local newspapers.
- » **Income generation:** funders normally want evidence from organisations to show both their track record of past achievement and the need for the proposed activities. Summaries of monitoring data can provide potential funders with hard evidence to support the proposal and be an outstanding fundraising tool for writing tenders, applying for grants and getting commissions.
- » **Equality and diversity:** collecting information about the diversity of stakeholders will help to clarify who the organisation serves, where gaps exist and which communities are engaging in the programmes and services offered by the organisation. It serves as a statistical map and evidence base rather than someone's 'impression' or best guess about who is engaged with the organisation.
- » **Legal obligations:** certain obligations are required by law, such as recruitment monitoring for employment purposes.
- » **Management:** managers need information in order to understand recruitment and retention rates and to create high quality programmes. Without some of this basic information, staff will have difficulty in managing the quality of their programmes and in providing people with the support and guidance that they need.

There are two types of information sources:

**Quantitative data** – this refers to numeric data and can involve counting and measuring people, their behaviours or the current situation. This type of data is often gathered through surveys or monitoring forms and usually involves 'ticking boxes' in a closed question format. An example would be the percentage of BAME groups that are members or the number of women that received advice from the organisation.

**Qualitative data** – is data that cannot be quantified which is wide and varied and often refers to anecdotal information that can be collected through text and spoken word such as diaries, consultation through focus groups, interview data or information collected through direct observation. The benefit of such data is that it is detailed and provides a very good view of people's experiences. It also allows the use of words that come directly from stakeholder experiences.

The evidence gathered about organisational policies and conclusions drawn from any analysis must be used to inform future actions to improve delivery. This will also help decide on the scope of the equalities work. For example, if an organisation has a project which has no data on LGBT or disabled communities, then a focus of an EIA may be to consult with each community to find out the levels of awareness of the services, if there

are needs that may be served better or which aspects of the project might be difficult for those groups to access. This information may result in evidence of a negative impact.

A template for organisations to assess the types of information they currently have is included in Appendix D. The checklist may be able to be completed by an organisational leader in a small organisation but for larger groups might be circulated to all staff to gain a complete picture of the types of information collected in the past and currently. It is meant to serve as a mapping tool to help groups fill in areas where information has already been collected. This is a good starting point for discussing future data collection strategies, needs and systems.

## Monitoring

One of the most common and essential components of data collection is monitoring. We use the term in the guide to refer to a systematic process for measuring and evaluating stakeholders and quality within organisations. Monitoring systems normally have associated forms and information storage capacity as well as training needs for the people who manage and implement the monitoring. Equalities monitoring is not just a useful tool for completing an audit or EIA; it is also essential when developing and collating key performance information or being used as a benchmarking tool. Monitoring is useful when trying to find out whom an organisation or service is reaching or if an organisation is incorporating fair employments practices.

The following points are meant as a guide for organisations when collecting and storing information. While every organisation is unique and should develop systems and processes that are adapted to their needs, these guidelines serve as general good practice advice.

1. Keep individual information about people stored safely and securely and abide by the Data Protection Act 1998. Organisations should have a data protection policy in place that specifically includes the type of data they collect. Staff and volunteers should receive training on the Data Protection Act guidelines. Data protection includes:
  - a. Explaining to people why you are collecting information about them and what you will do with that information;
  - b. Getting consent from people to hold their personal details;
  - c. Only using data for its intended purpose;
  - d. Storing personal data securely and sharing information with others only as needed or appropriate and
  - e. Storing data only as long as it is needed.
2. As far as possible, separate identifying information about people (such as applicants for employment) from equalities and diversity data and store this information in separate files, databases or spreadsheets. Sensitive equalities information should be stored centrally and should not identify people. Some groups use a coding system that is password protected. Equalities information should be kept with one person if

possible who has responsibility for aggregating the data and reporting it. Monitoring forms can be pre-coded by project, location or programme if necessary so as to maintain confidentiality.

3. Staff and volunteers must be fully informed and at ease with collecting data and ideally would receive training in this regard. People who directly collect monitoring information must be told about the usage of the data and its importance to the organisation in order to successfully collect the data. If staff and volunteers are not comfortable asking for this information, they should receive additional coaching or support until they feel fully competent and capable of collecting the required data.
4. Minimise the number of forms and paperwork for service users. Organisations should create a simple and streamlined process for people. This should include monitoring forms that are clear and jargon-free. Monitoring forms should also include:
  - a. Definitions of key terms and concepts and using examples as appropriate;
  - b. Offer of help to complete any forms;
  - c. Offer of multiple communication methods (i.e. paper, electronic, web-based, phone);
  - d. Offer alternative formats (i.e. larger fonts, audio);
  - e. An introductory explanation of how the data will be used and stored;
  - f. A self definition box as appropriate (such as for ethnicity, gender identity, sexual orientation, belief or disability);
  - g. An option of 'rather not say' for all questions and
  - h. An option for 'other' or 'don't know' as appropriate.
5. Collect information that you can compare to local and national data sets. Use categories on monitoring forms that match questions from data sets such as the National Census or the Citizenship Survey or the Place Survey.
6. When monitoring age, do not use age bands as they are difficult to compare with other data sets. Use date or year of birth or age as an open field instead.
7. Create an operational question related to access needs which is separate from the monitoring form or disability question. This should happen for applicants for employment or volunteering, training participants, service users and others. This will capture any adjustments that the organisation might need to make for people who have particular needs such as wheelchair access, sign language interpreters, foreign language interpreters, disabled parking or the like.
8. Feedback from stakeholders can take many forms such as suggestions, complaints, evaluations and exit interviews. Feedback can be both informal and formal but information needs to be captured in a written format. Once the information is collected, make sure that it makes its way into the internal planning process of the organisation in order to fully utilise and benefit from stakeholder experiences.

The following guidance is suggested for organisations who are developing or improving information collection systems:

1. Discuss, debate and decide how the organisation will use its data and what type of data it will collect. This dialogue should take place at all levels of the organisation and include the governing body, staff and volunteers.
2. Decisions regarding the use of monitoring and data collection must be communicated to all levels of the organisation, including staff, volunteers and the governing body.
3. Organisations should have policies in place that complement information gathering procedures. For example, data protection, equal opportunities, an equalities action plan and vulnerable people policies.

Sample monitoring forms can be found in Appendices A and B and serve as a starting point for organisations who would like to develop a way to collect information about stakeholders. The sample forms are models and should not be used 'as is' without discussing and adapting the information to suit the unique situation of each group. The forms have been created around the six equality strands but can be adapted or amended to include the monitoring of other characteristics as well, such as employment status.

## **Sampling and representation**

When looking at data collection issues, organisations need to decide if they can capture information from the whole population they are interested in or if they need to collect information from a sample or smaller portion of the total group. Sampling refers to the process of selecting participants from the total possible universe of the target group. Organisations use sampling as a way to choose the people or organisations they will target to gather information. Common types of sampling include:

- » Random sampling – this would involve choosing a random selection of participants from the total either through a computer generated list or by choosing for example even numbered member IDs
- » Quota sampling - this involves choosing categories that are important to capture (such as ethnicity) and filling the categories in proportion to their existence in the population
- » Cluster sampling – involves using naturally occurring 'clusters' of people, such as might occur at a school or university
- » Snowballing – is a process of sampling that begins with just a few people and each of those people are asked to refer a few more people and the sample then grows through word of mouth

Sampling is sometimes 'boosted' to include additional representation from minority groups who might otherwise form a very small sample. Samples can also be 'weighted' to make up for under-represented groups in the sample. Less formal sampling for qualitative projects might include only very small samples that would be impossible to make representative and therefore project leaders might just choose certain characteristics.

Organisations sometimes find it difficult to access potential participants, whether it be individuals or groups and finding lists or contacts can be a big challenge. Potential sources might include local council lists or reference groups, local CVS member lists, contacts from other second tier or local organisations.

Data collection requires a system in place to properly store the information. There are benefits and disadvantages of different types of storage systems such as spreadsheets, databases and paper based systems. Organisations should ask themselves the following questions in relation to data storage:

- » How many stakeholders do we work with on average each year?
- » How many separate projects, services or sites do people work at or use?
- » Does the organisation have a reliable ICT system that is available to all staff?
- » Does the organisation offer ICT training and support to staff or volunteers related to spreadsheets or databases?
- » Who is responsible for collecting and maintaining information that is collected?
- » How is the information used within the organisation?

## 4.2 Question design and testing

When organisations have assessed the type of information that is needed, the research instruments and who they will collect the information from, the next step is to design and test questions so as to get useful and appropriate responses. There are generally two types of questions used; closed and open questions. Closed questions have a pre-determined set of responses built in, such as yes/no questions or questions with a range of responses. Open questions allow participants to respond in their own words as much as they like. Open questions tend to be short and have long responses. Closed questions tend to be longer.

There are typically a number of different types of questions that can be used to collect information. Common examples are as follows:

- » Yes/no answers
- » Agree/disagree with a statement
- » Choose from a list of options
- » Ranking
- » Statements (open questions)
- » List
- » Likert scale (five levels of agreement or disagreement)
- » Rating items
- » Feelings about a topic

Question design should keep in mind the following guidelines:

- » Adapt the style of questions to the target group
- » Ask questions that require people to answer only about themselves rather than answering for others
- » Do not ask questions that are irritating or annoying to people
- » Ask questions that respondents will have some information, experience with or knowledge about
- » Avoid using leading questions that suggest an answer or prompt a particular kind of response
- » Avoid asking the same questions in different ways in the same questionnaire
- » Avoid using words or phrases that may be offensive to people
- » Do not assume things about people in the questions unless you are certain they will apply to everyone
- » Pay attention to the order of questions and the numbering and put the simplest and least contentious questions nearer the start and more complex or difficult questions later
- » Include only questions that are vital to the project and avoid unnecessary questions
- » Keep questions as simple and straightforward as possible and avoid using jargon or technical words
- » Avoid vague questions and make sure the wording is very clear and unambiguous
- » Give respondents sufficient answer options for closed questions but if the list is too long, choose the priorities and then give an option for 'other'

Questions designed for information gathering should always be tested with a few people before being finalised so as to work out any gaps, unclear questions or areas of confusion. Be sure to include an introduction and instructions when designing data collection instruments. Instructions or introductions should include information about the length of time it will take, who to contact if there are questions or problems and how to get support or assistance for completing questions or questions in an alternative format.

### **4.3 Data analysis**

Data analysis simply refers to the process of interpreting what the information and evidence collected tells you. Organisations draw conclusions from the information collected and identify possible courses of action or recommendations related to equality and diversity. There are five main stages to data analysis:

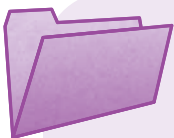
1. Preparing the data
2. Initial exploration of the data
3. Analysis of the data
4. Representation and display of the data
5. Validation of the data

The preparation of data includes checking and 'cleaning' data as well as coding the data so that it can be more easily viewed and interpreted. This sometimes includes entering data into a spreadsheet or software programme.

The initial exploration of the data is when the analyst should get to know the data fully and look for any obvious trends, correlations or recurrent themes or issues. These should be written as notes to accompany the data. The actual analysis of the data can be done by hand or through a computer programme designed for this purpose such as Statistical Package for the Social Sciences (SPSS) or Excel. The data should be grouped and quantitative data can use descriptive statistics to get totals or to do cross-tabulations. For example, a spreadsheet can easily tell how many women aged 18 to 25 are service users. Qualitative data, especially if there is a small amount of data, can be viewed on paper by transcribing interviews or focus groups for example, printing out the responses and coding them by themes or categories. Analysts can create a matrix to track key themes and then develop actions or recommendations based on the findings. Qualitative data also lends itself to using the quotes or wording directly from respondents, so it is helpful to record interviews, focus groups or consultations if possible.

### **Example - What are focus groups?**

In a focus group, people are brought together to discuss a particular broad issue and specific aspects of it in detail. For example, people might be brought together to discuss the provision of a service. Or residents of a particular area might be invited to come along to a focus group to discuss housing services in their area. A focus group is a useful approach for testing out plans and ideas for developments, new projects, for identifying good and poor elements of a service, or gaps in services, and for exploring people's aspirations about a focussed issue.



Say for example you are aware, having carried out an assessment of your monitoring data, that the project does not attract enough people with disabilities. You could organise a focus group in partnership with other voluntary and community sector organisations in your area or who are part of your local CVS interested in the same issues to discuss what stops people with a range of disabilities from using services, and what additional support can be given to these groups to ensure they have access to the support they need.

### **Why do a focus group?**

A focus group is an effective way of identifying how a community views an issue and exploring in a safe setting, and in some depth, the reasons behind views. The group dynamic and exchange of views can help people understand the issue differently or in more detail.

## How?

A focus group or discussion group is usually made up of no less than five and no more than ten people. The optimum number is six to eight. It can bring together people who reflect the relevant community (e.g. age ranges (old/young), Black Asian Minority Ethnic Groups, women, LGBT, faith groups). Try to ensure the participants represent a broad range of people and are not just the usual suspects. Find an experienced facilitator to lead the group, this will help to ensure that everyone has a chance to speak and be heard. Start by agreeing ground rules, especially about confidentiality. The discussion will need some structure; a good facilitator can ensure the discussion doesn't drift, while also allowing all relevant issues to be explored. Focus groups should last no more than two hours.

## What are the pitfalls?

- » The facilitator runs the group like a meeting, discussions can drift to different areas;
- » Some people like to dominate discussion and don't let others participate
- » The key is good planning.

## 4.4 Useful research resources

The following resources are specifically for helping organisations to find useful statistics, secondary data and research related to equality and diversity. There are many additional resources listed in the 'Useful Contacts' section.

Office of National Statistics – <http://neighbourhood.statistics.gov.uk> - provide various useful demographic statistics at national, regional and borough levels.

Local authority – each local authority tends to have a website with local information and statistics such as local labour market information.

Equality and Human Rights Commission - [www.equalityhumanrights.com](http://www.equalityhumanrights.com)

Archive sites from the previous equality commissions:

- » Commission for Racial Equality – analysis by racial group on population, health, housing, criminal justice, education, and the labour market.  
<http://83.137.212.42/sitearchive/cre/index.html>
- » Disability Rights Commission DRC – labour market.  
<http://83.137.212.42/sitearchive/DRC/index.html>
- » Equal Opportunities Commission – comparing the lives of women and men, including women and men from different ethnic groups.  
<http://83.137.212.42/sitearchive/eoc/index.html>

## 4.5 Equality audit checklist

An equality audit checklist appears in Appendix E of this publication.

## 4.6 Equality impact assessment reporting template

The following template is designed to be used in conjunction with the assessment framework described in section three. The template can be used to guide organisations through the process and is meant to result in an EIA report. Please read section three before using the template.

### EIA section 1 – Aims and implementation of the project

The full EIA should include all stages outlined in the previous section on EIAs. The previous completed screening and questions support the assessment tool. The report should be presented in narrative form with an action plan appended to the report setting out how any identified discrimination will be addressed and mitigated. Text in panels indicate examples.

#### A. Identify the aims

What is the project, policy, strategy or service?

What is the aim, objective, or purpose of the project?

Use existing documents such as strategic or business plans, tender documents, recent bids or contracts.

#### B. Rationale

(Please state the underlying project objectives which underpin this service and what they are trying to achieve).

What outcomes do we want to achieve from this project?

What factors could contribute or detract from the outcomes?

Use existing documents such as strategic or business plans, tender documents, recent bids or contracts. In addition if the organisation has completed a risk assessment which is normal for bid/tender documents an assessment of what could detract from outcomes may have been done.



**Example:** An outcome of a project could be increasing the number of local people, especially those from disadvantaged communities, involved in decision making around health and social care.

A factor that could contribute to this may be the employment of local community outreach personnel, and a factor that may detract could be printed information is not translated into community languages.

### **C. Who is affected by the project? Who is intended to benefit from it and how?**

Who are the main stakeholders in relation to this project/service?

Stakeholders include anyone or organisation that has a vested interest in the delivery of the service and can include staff, service users, wider local community interest groups; partners including other voluntary sector organisations; funders, local authority or PCTs.

What outcomes would other stakeholders want from this project?



Wider community stakeholders would be interested in improving healthcare provision across the area. For example better dental services or improvements in community care.

Are there any groups which might be expected to benefit from the intended outcomes which do not?



The project may aim for wider participation however, the number of disabled people accessing the service is low.

### **D. Promotion of good relations and community cohesion**

How does the project or service contribute to the organisation's strategic objectives, delivery or business plans? (Use existing documents such as strategic or business plans, tender documents, recent bids or contracts.)

How do you promote good relations between different communities served based on mutual understanding and respect?

### **E. Project priorities**

How does the project fit in with the organisation's wider aims?

How does the project/services relate to other projects and services delivered by the organisation?

What factors or forces could contribute or detract from the outcomes?

How do these outcomes meet or hinder other objectives of the organisation?

## **EIA SECTION 2 – Consideration of data and research**

This section requires action to identify ways of obtaining information, such as through monitoring and consultation. Once the necessary information has been obtained and analysed the rest of the EIA may then be completed. Much of the questions in this section may have been explored in the previous screening section or through mapping of current data collection.

### **A. Mapping of current information**

List all examples of quantitative and qualitative data available that will enable the impact assessment to be undertaken (*include information where appropriate from other organisations including local authority statistics*). The use of the monitoring checklist may be useful for this question.

### **B. Equalities profile of users or beneficiaries**

Use your diversity monitoring forms and provide data by target group of users or beneficiaries to determine whether the service user profile reflects the local population or relevant target group or if there is over or under representation of these groups.

### **C. Equalities profile of staff, volunteers or trustees**

Indicate profile by target groups and assess relevance to policy aims and objectives (e.g. Workforce to Reflect the Community). Identify staff responsible for delivering the service. Using online survey tools can make this job much easier as long as respondents are all able to access the internet.

### **D. Evidence of complaints against the service on grounds of discrimination**

Is there any evidence of complaints from clients, staff (grievance), volunteers or trustees as to the delivery of the service, or its operation, on the equality target groups?

### **E. Barriers**

What are the potential or known barriers to participation for the different equality target groups?

## **F. Recent consultation exercises carried out**

Detail consultation with relevant interest groups, other public bodies, voluntary organisations, community groups, trade unions, focus groups and other groups, surveys and questionnaires undertaken. Focus in particular on the findings of views expressed by the equality target groups.

## **G. Identify areas where more information may be needed and the action taken to obtain this data.**

Consider data that is monitored but not reported, data that could be monitored but is not currently collected and data that is not currently monitored and would be difficult to collect.

Gaps in information:

Action needed:

(Include short-term measures to be taken to provide a baseline where no or little information is available)

## **EIA SECTION 3 - Assessment of impact**

Having collected and analysed the data in section two, you should now be in a position to assess the likely impact on equality groups.

When assessing all the data in relation to the six equality strands there are key considerations:

- » Does the quantitative or qualitative data show disproportionate differences between different equality groups?
- » Does the project directly or indirectly discriminate against any group?
- » Are there any concerns that the project affects equalities groups differently and do these differences amount to a negative impact or even an unlawful indirect discrimination?
- » Is there any evidence of positive impacts on equality groups?
- » If there are incidences of indirect discrimination, is it justifiable (e.g. providing women only services is justifiable on the grounds of promoting equality of opportunity for one disadvantaged group)? Seek legal advice if you are not sure.

## A. Race – testing of disproportionate or negative impact

Identify the effect of the project on different **race** groups from information available above. How is the target group reflected in the take up of the service? For example a project may identify through research information that a particular group has been missed out.



Project A – aims to deliver a service which targets disadvantaged groups within the community. The evidence collected shows that the local area has a BAME community made up of 30% Bangladeshi, 25% Black British, 30% white British, 5% Chinese and 10% other. Monitoring of staff, service users and management structures such as steering group and boards show an underrepresentation Bangladeshi's within the staff team, a lack of white British service users and a lack of Black British on the steering group.

From the evidence above does the project affect, or have the potential to affect, racial groups differently and if so do any of the differences amount to adverse impact or unlawful discrimination?

If there is an adverse impact, can it be justified on the grounds of promoting equality of opportunity for one racial group or for another legitimate reason?

Could the project discriminate, directly or indirectly and if so is it justifiable under legislation?

## B. Gender – testing of disproportionate or adverse impact

Identify the effect of the project on **men, women and transgender** groups from information available above.

How are the gender groups reflected in the take up of the service?

From the evidence above does the project affect, or have the potential to affect, gender groups differently and if so do any of the differences amount to adverse impact or unlawful discrimination?

If there an adverse impact, can it be justified on the grounds of promoting equality of opportunity for one gender group or for another legitimate reason?

Could the project discriminate, directly or indirectly and if so is it justifiable under legislation?

### **C. Deaf and disability – testing of disproportionate or adverse impact**

Identify the effect of the project on the **disability** strand from information available above.

How are deaf and disabled people reflected in the take up of the service?

From the evidence above does the project affect, or have the potential to affect, disability groups differently and if so do any of the differences amount to adverse impact or unlawful discrimination?

If there is an adverse impact, can it be justified on the grounds of promoting equality of opportunity for one group or for another legitimate reason?

Could the project discriminate, directly or indirectly and if so is it justifiable under legislation?

### **D. Age – testing of disproportionate or adverse impact**

Identify the effect of the project on different **age** groups from information available above.

How are young and old people reflected in the take up of the service?

From the evidence above does the project affect, or have the potential to affect, age groups differently and if so do any of the differences amount to adverse impact or unlawful discrimination?

If there is an adverse impact, can be justified on the grounds of promoting equality of opportunity for one group or for another legitimate reason?

Could the project discriminate, directly or indirectly, and if so is it justifiable under legislation?

### **E. Sexual orientation – testing of disproportionate or adverse impact**

Identify the effect of the project on **lesbian, gay, bisexual** groups from information available above.

How are LGB groups reflected in the take up of the service?

From the evidence above does the project affect, or have the potential to affect LGB groups differently and if so do any of the differences

amount to adverse impact or unlawful discrimination?

If there is an adverse impact which, can it be justified on the grounds of promoting equality of opportunity for one group or for another legitimate reason?

Could the project discriminate, directly or indirectly and if so is it justifiable under legislation?

### **F. Religion/Belief – testing of disproportionate or adverse impact**

Identify the effect of the project on different **religion/belief** groups from information available above.

How are the religion/belief groups reflected in the take up of the service?

From the evidence above does the project affect, or have the potential to affect, religion or belief groups differently and if so do any of the differences amount to adverse impact or unlawful discrimination?

If there is an adverse impact, can it be justified on the grounds of promoting equality of opportunity for one group or for another legitimate reason?

Could the project discriminate, directly or indirectly, and if so is it justifiable under legislation?

### **G. Additional groups which may experience a disproportionate or adverse impact**

Identify if there are groups, other than those already considered, that may be adversely affected by the project.



For example those in poverty may be adversely impacted by the policy and it might be useful to consider them as a separate group in the light of the organisation's overall policy objectives.

## **H. Additional factors which may influence disproportionate or negative impact**

### *Management arrangements*

How is the service managed, are there any management arrangements which may have a disproportionate impact on the equality target groups?

This could include when and where management meetings take place, whether they are open to the public or not, involvement in steering groups, committees and boards. It could also include the support available to groups to enable them to participate such as training and development or the reimbursement of childcare or transport fees.

What is the custom and practice in the provision or allocation of this service?

Could these have a disproportionate impact on the equality target groups?

This could include service location(s) and accessibility, or stereotypes and assumptions about who uses the service for example are there provision for young people who are carers, lesbian and gay parents if the target groups include all equality groups.

## **I. Operation times**

When are services provided? Are there seasonal issues or barriers to the service based on the time and delivery of the service which may affect the target groups?

## **J. Communication methods**

What methods do you use to communicate this service? Include reviews and assessments of methods, media, translations and interpretation for example; bearing in mind the extent to which these communication tools are accessible to all sections of the community.

*Externally – the following list serves as a guide, please amend it to reflect your experience.*

- » Word of mouth via:
- » Employees
- » Volunteers
- » Trustees or Management Committee
- » Partners

- » Members
- » Other service users (current or former)
- » Referrals from other organisations or agencies
- » Our own website
- » Other websites (such as the Council, partners, funders or specialist groups)
- » Targeted emails
- » Publications
- » Media (local, regional, national)
- » Newspapers
- » Radio
- » TV
- » Online media
- » Community events and gathering places
- » Specialised community resources:
- » Organisations representing equality groups
- » Newspapers for equality groups
- » Other media for equality groups (such as websites, radio or TV)

*Internally*

### **K. Local awareness**

Assessment of the extent to which local people are aware of the service based on available data. What measures do you undertake to reach traditionally excluded communities?

For example, this could be done through a brief face to face survey in local community gathering places to ask a random sample of people (preferably at least 50) if they are aware of the project or service.

Evidence of disproportionate or adverse impact:

Is there any evidence or view that suggests that different equality, or other, target groups in the community have a disproportionately high or low take up or impact related to this service or function?

yes       no

*If yes, please describe what and why (state below)*

These answers will form the basis of the action plan in the sections below.

## **EIA SECTION 4 - Measures to mitigate disproportionate or adverse impact**

Specify measures that can be taken to remove or minimise the disproportionate impact or adverse impact identified at the end of Section 3. If none were identified in Section 3, identify how this could be avoided in the future. *(Consider measures to mitigate any adverse impact and better achieve the promotion of equality of opportunity).*

## **EIA SECTION 5 - Conclusions and recommendations**

Does the project comply with equalities legislation, including the duty to promote equality in relation to race, disability and gender? Take into account your findings from the impact assessment and consultations and explain how the policy was decided upon, the intended effects and benefits.

yes       no

What are the main areas requiring further attention?

Summary of recommendations for improvement (these will go into the action plan section below (appendix F)).

How will the results of the EIA feed into the performance planning process?

## 5. Glossary and timeline

This section gives organisations an overview of basic equality and diversity terms as well as providing a short history of equalities in the UK. Because we often work with such a wide range of stakeholders, the glossary can be a useful tool to ensure that everyone has a basic understanding of what we mean by various terms, the equality strands and the historical development of equalities in the UK. This section can be used as a standalone tool or adapted and shared with local leaders and other stakeholders. It can also be used as a starting point or basis for an equalities dialogue between or within communities.

The glossary which follows has been created via consultation with many people and sources, dictionaries and websites. It is not meant to be an exhaustive or definitive list of terms and attempts to represent the common use of these terms in everyday language and by policy-makers when writing about equality.

Language and terminology are changeable and contested. Words can reinforce beliefs and prejudices, but can also be used to challenge discrimination. As such, it must be recognised that the meaning of these terms will be subject to change more quickly than revisions might be made or issued and it is hoped that the document will serve as a starting point for discussion as well as a resource that will evolve over time.

### 5.1 Equalities glossary - general terms

**Assimilation:** absorbing minorities into the ways of the majority. This can mean adopting the majority language, customs or values. Generally, it means creating a loyalty to the majority and a reduction of differences with it on the part of minority groups. Assimilation in this sense characterises, for example, official policy in France, though it has not prevented divisions arising there.

**Integration:** in contrast to **assimilation**, requires acceptance of a country's laws but does not refer to the elimination of all cultural differences or group identities. It is a two-way process, through which both mainstream and minorities influence and change one another, and in which differences can be accommodated as long as there is a common bond or commitment to peaceful co-existence.

**Multiculturalism:** the idea or policy that many different **cultures** can co-exist and be supported within a society. This is opposed to the concept of nationalism, which requires the following of a single national **culture**. Policies favouring multiculturalism generally would advocate for support of multiple languages, within schools for example or allowing people to wear religious dress.

**Belief:** is a philosophical system comparable to religion. For example, atheists, agnostics and Humanists would be protected from discrimination.

**Culture:** the distinctive customs, achievements, products, outlook, etc. of a society or group. The 'way of life' of a society or group.

**Direct discrimination:** is where you treat someone less favorably based on real or perceived identity such as ethnicity, disability or gender. This is unlawful in the UK.

**Indirect discrimination:** occurs where certain requirements, conditions or practices imposed has an adverse impact disproportionately on one group or identity. For example, stipulating that all employees must be six feet tall would disproportionately disadvantage women or requiring no head wear for employees would indirectly discriminate against Sikh men; these examples would be unlawful. There are situations where indirect discrimination can be justified and that tends to be around issues of health and safety. For example it is compulsory to wear hard hats on a construction site.

**Diversity:** with regard to groups or societies, the quality of having many differing types of groups and individuals with differences and variations. For example, a diverse group might include individuals from various ethnic groups, ages, abilities and faiths.

**Equality:** the same or equal status in terms of quality, power or degree. When we speak about equality, this often reflects the idea of Egalitarianism, which means the political, social and economic equality of people. When discussing equality, there are generally three strands that people talk about. The first is equal treatment in specific areas such as with regard to benefits or before the law. The second is **equality of opportunity** and the third is **equality of outcome**. One of the difficulties around this issue is in deciding how far policy can go to 'create' equality and also in defining specifically what is meant by equality and the best way to achieve it.

**Equality and Human Rights Commission (EHRC):** The Commission is an independent Non-Departmental Public Body whose purpose is to reduce inequality, eliminate discrimination, strengthen good relations between people and protect **human rights** for people throughout the UK. The EHRC aims to take an active role in helping to achieve change to benefit some of the most vulnerable and least well represented people in society. The EHRC replaces the previous role of the individual **equality** bodies such as the Commission for Racial Equality, the Disability Rights Commission and the Equal Opportunities Commission. The website is located at [www.equalityhumanrights.com](http://www.equalityhumanrights.com).

**Equality of opportunity:** is often referred to as providing 'a level playing-field' in terms of giving different groups of people an equal starting point in an unequal society. This often plays out in areas such as competition for jobs, housing and education. However, one disadvantage can compound another and it is very difficult to measure whether or not disadvantaged groups are actually getting an equal opportunity for things like jobs and health care. Many government policies are based on this idea such as the Race Equality Duty for Employment which attempts to give everyone, regardless of their ethnicity, fair access to gaining employment, skills and training. This is often why monitoring of

equality strands is important to policy-makers, government institutions, employers and organisations.

**Equality of outcome:** is a form of Egalitarianism that attempts to minimise the differences in material resources or wealth between households or individuals. This is easier to measure than **equality of opportunity** but it is a more controversial policy idea and often conflicts with traditions such as inherited wealth. Progressive taxation (where people with more money pay higher taxes and people with less money pay lower taxes) is an example of a government policy that is based on equality of outcome.

**Equality audit:** is a way to systematically review the policies, procedures, services or culture of an organisation related to equalities. It can involve employees, service users, volunteers, trustees, members or other stakeholders.

**Equality impact assessment:** is a tool to identify if strategies, projects and policies are having an adverse impact on a particular group of people due to their identity. The idea is to examine critically and identify any institutional barriers, acts or omissions that detrimentally affect individuals and communities because of race, gender, age, religion or belief, sexual orientation or disability.

**Globalisation:** the development of worldwide economic, political, social or cultural interdependencies where decisions and actions in one part of the world impact other parts of the world. Globalisation has been made possible by enormous technological advances such as the internet. Some argue that the result of this process has been to increase the amount of migration between countries.

**Hate Crime:** physical, verbal or other violence and crimes committed against people because of their perceived identity. This could include physical harassment and violence, verbal assault, hate mail, sexual abuse or financial abuse. Hate crimes could be committed by strangers, care workers, family members, neighbours or partners.

**Human Rights:** fundamental rights that apply to all people. The United Nations (UN) definition includes the following:

- » From Article 1, the universal declaration of human rights, it states that “all human beings are born free and equal in dignity and rights. They are endowed with reason and conscience and should act towards one another in a spirit of brotherhood.”
- » Article 2 forbids “distinction of any kind, such as **race**, colour, sex, language, religion, political or other opinion, national or social origin, property, birth or other status.”
- » Article 3 proclaims the right to life, liberty and security of person - a right essential to the enjoyment of all other rights. This article introduces articles 4 to 21, in which other civil and political rights are set out, including: freedom from slavery and servitude; freedom from torture and cruel, inhuman or degrading treatment or punishment; the right to recognition everywhere as a person before the law; the right to an effective

judicial remedy; freedom from arbitrary arrest, detention or exile; the right to a fair trial and public hearing by an independent and impartial tribunal; the right to be presumed innocent until proved guilty; freedom from arbitrary interference with privacy, family, home or correspondence; freedom of movement and residence; the right of asylum; the right to a **nationality**; the right to marry and to found a family; the right to own property; freedom of thought, conscience and religion; freedom of opinion and expression; the right to peaceful assembly and association; and the right to take part in the government of one's country and to equal access to public service in one's country.

» Article 22 sets out economic, social and cultural rights - the rights to which everyone is entitled "as a member of society." The economic, social and cultural rights recognized in articles 22 to 27 include the right to social security; the right to work; the right to equal pay for equal work; the right to rest and leisure; the right to a standard of living adequate for health and well-being; the right to education; and the right to participate in the cultural life of the community.

**Inclusive language:** represents verbal or written communication by words, phrases and concepts. Inclusive language refers to the intention of avoiding words, phrases or concepts that **stereotype** or discriminate against someone because of factors such as ethnicity, **gender**, faith, disability, **sexual orientation**, age or **refugee** status. The most basic reason for using inclusive language is that it is more precise, which provides a more accurate and effective means for conveying thoughts. Another reason for using inclusive language is that it displays sensitivity to the possibility of well intentioned words causing someone to feel less important or marginalised.

**Migrant:** this is someone who moves to another country with the intention of living there either temporarily or permanently.

**Immigrant:** this is someone entering another country with the purpose of settling there either temporarily or permanently. Immigration refers to the flow of people into a particular country. Immigrants in the UK can be from any country or cultural background.

**Emigrant:** this is someone leaving their country to live or settle in another country. Emigration refers to the flow of people moving out of a particular country.

**Nationality:** the legal status given to a person regarding citizenship or 'home country', normally based on country of birth or naturalisation (the process of becoming a citizen in another country). Nationality is normally indicated by a person's passport. It is not possible to know someone's nationality based solely on the way they look or speak. It is possible for a person to have more than one nationality and for their nationality to change. Most **British** nationals are **British** citizens however there are several other categories of **British** nationals. **British** citizens have the right to live permanently in the UK.

**Positive action:** allows organisations to provide facilities or services (in training, education or welfare) to meet the particular needs of people from different groups.

**Stereotyping:** to characterise all members of a particular group with certain traits, good or bad. An example of this would be to say that women are good at maths. Stereotyping people from any particular **equality** strand or minority group is not a good idea because it can lead to unequal treatment or discrimination as well as being generally inaccurate, as there will always be people who don't fit the stereotype and people who do.

## 5.2 Age

The UK population as a whole is ageing, with the fastest increases in those over 65, particularly those over 85. At the same time, numbers of young people (under 16) are decreasing. Age demographics can change significantly by area or region, for example in some London boroughs the population is much younger.

Negative attitudes towards **older people** in particular are often evident in the language used about age. **Older people** are often omitted from images unless the subject refers particularly to age and all too often care workers and others take a patronising and offensive tone with **older people**. The preferred terminology is often '**older people**' rather than 'the elderly' or 'pensioners'. It is important to remember that **ageism** can also be used negatively against **young people**, for example assuming they lack maturity, and that they are unable to contribute fully because of inexperience or **youth**.

Public policies in relation to age and employment have recently helped older workers to stay active in the work force. Compulsory retirement below the age of 65 is unlawful and companies are not required by law to set a mandatory retirement age. **Children** up to the age of 12 are generally not legally able to work but **young people** who are 13-15 can take on light jobs and people who are 16-17 are classified as young workers who are able to take on more types of jobs. People under the age of 18 who work are subject to more stringent regulations in relation to how much they can work and what type of work they can do. From the age of 18, people are considered adults for employment purposes.

**Ageism:** is **stereotyping** and prejudice against individuals or groups because of their age. The term was coined in 1969 by US gerontologist Robert Butler to describe discrimination against **older people**, patterned on sexism and racism<sup>6</sup>.

**Age discrimination:** happens when someone is treated unfavourably because of their age, without justification, or is harassed or victimised because of their age. People are legally protected against age discrimination currently in employment and vocational training.

**Older people:** generally people are considered as 'older' from the age of 50 and up. Many government programmes for older people include anyone 50 and over, although some begin at 60 (for example many free bus pass schemes and the Senior Link programme).

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6 Kramarae, C. and Spender, D., 2000. *Routledge International Encyclopedia of Women: Global Women's Issues and Knowledge*. Routledge, Oxford.

**Youth/Young People:** when **children** reach adolescence they enter into the borderlands between childhood and adulthood and we generally refer to this group as young people, youth or teenagers (if they are between 13-19). The Government often refers to young people between the ages of 16-24 for many of its schemes targeted to youth, however the age group for young people could range from 10-29.

**Children:** the general guideline, although everyone is different, would be people up to the age of 13, at which point they would be referred to as a young person or teenager. Children tend to be people who have not yet reached puberty. For example, legally, a person under the age of 13 cannot consent to sexual activity. It should also be noted that the legal age of consent in Britain is 16.

## 5.3 Deaf and disabled people

### Definitions

The Disability Discrimination Act (DDA) which was passed in 1995 and later amended in 2005 defines a disabled person as someone who has a physical or mental impairment that has a substantial and long-term adverse effect on his or her ability to carry out normal day-to-day activities. For example; people with HIV, multiple sclerosis and people who are blind are automatically considered as 'disabled'. Disability also includes mental health issues and learning difficulties.

For the purposes of the DDA:

- » Substantial means neither minor nor trivial;
- » long term means that the effect of the impairment has lasted or is likely to last for at least 12 months (there are special rules covering recurring or fluctuating conditions);
- » normal day-to-day activities include everyday things like eating, washing, walking and going shopping;
- » a normal day-to-day activity must affect one of the 'capacities' listed in the Act which include mobility, manual dexterity, speech, hearing, seeing and memory.

People who have had a disability in the past that meets this definition are also covered by the scope of the DDA. There are additional provisions relating to people with progressive conditions. The DDA 2005 made important changes to the scope of the original legislation, including creating a legal duty for public authorities to actively promote disability **equality** and amending the previous definition of disability by removing the requirement that a mental illness should be 'clinically well-recognised'.

It also ensured that people with HIV, cancer and multiple sclerosis are to be covered by the DDA effectively from the point of diagnosis, rather than from the point when the condition has some adverse effect on their ability to carry out normal day-to-day activities.

The DDA makes it unlawful for people who have a disability to be discriminated against in:

- » employment;

- » trade organisations and qualifications bodies;
- » access to goods, facilities and services;
- » the management, buying or renting of land or property and
- » education.

There are also specific DDA regulations dealing with buses, coaches and trains, which set out access standards for those vehicles to help people with mobility or sensory impairments and learning disabilities.

## Context

There are more than 8.7 million disabled people in the UK, according to the most recent census. Of this number, more than 1.4 million deaf and disabled people are in London. Of the working age population, 6.9 million have a disability in the UK. One in five working people are thought to have a disability.

The social model of disability locates the disability within the physical barriers and negative attitudes in society rather than a person's impairment. In terms of language, people with disabilities are sometimes characterised as belonging to a victimised group with common needs. This characterisation is perpetuated through the use of outdated terms such as 'handicapped', 'crippled' or 'the disabled'. Inclusive language helps to avoid this type of characterisation. Expressions that define people in terms of their disability are not helpful. For example, the term 'people with epilepsy' should be used rather than 'epileptics' and 'people with a visual impairment' rather than 'the blind'. The preferred phrasing emphasises the person before their disability. This is in contrast to the medical model (or individual model) which defines people by their medical condition and is seen as disempowering to disabled people.

In terms of language, do not characterise disabled people as victims or a group in need of 'charity'. As with other equality areas, do not lump all people with a disability into one big category and avoid de-personalising people by turning adjectives into nouns. It is helpful to use positive images of disabled people in order to illustrate that disability is incidental to the activity being undertaken<sup>7</sup>.

**Accessibility:** refers to the ease of use and access to places, services and resources for disabled people. This could range from the physical access of a building or a neighbourhood, the font size of text on a website or the provision of sign language interpreters for example.

**Learning disabilities or learning difficulties:** is a diagnosis, not a disease, nor is it a physical or mental illness. Learning difficulties are generally not treatable. Many people with learning disabilities prefer the term 'learning difficulties'. Learning disabilities can be a useful term in that it indicates an overall impairment of intellect and function. Alternative

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<sup>7</sup> University College London, 2007. *Guide to Non-Discriminatory Language* [online]. Available at: [www.ucl.ac.uk/hr/docs/non\\_discrim\\_language.php](http://www.ucl.ac.uk/hr/docs/non_discrim_language.php) [accessed 23 March 2010].

expressions are also used such as 'developmental disabilities' and 'intellectual disabilities'. There is no consensus presently on terminology. It is widely accepted that terms should be used which are clear, inclusive and positive.

Internationally three criteria are regarded as requiring to be met before learning disabilities can be identified:

- » Intellectual impairment
- » Social or adaptive dysfunction
- » Early onset

**Physical impairment:** is a condition affecting the body, as through sight or hearing loss, a mobility difficulty or a health condition.

**Mental impairment:** is a condition affecting 'mental functioning', for example a **learning disability** or mental health condition such as manic depression.

## Accessibility

In addition to language, one of the ways to help disabled people feel more comfortable and welcomed is to provide an environment that is fully accessible and that minimises potential barriers. The most important thing is to find out the individual needs of people and to not make assumptions about 'all disabled people' or for example that all blind people can read Braille.

Bear in mind the needs of disabled people in the design of written material. In producing typed text consider the size and shape of the typeface to ensure that the maximum number of readers can see it clearly without assistance. For example, disability organisations suggest that a minimum font size of point 12 should be used routinely, with a type face that is round and simple (such as 'Arial' which is used in this guide). This will help those with visual loss or dyslexia to read the text, as smaller and more elaborate fonts are more difficult to read. High contrast text and images with uncluttered backgrounds are also helpful to some people. Avoid superimposing text on images. Glossy paper and coloured print also make reading more difficult for everyone. Written materials, where requested, should be available in alternative formats such as a CD for those unable to read print.

All web based material should be **accessible** to the technologies used by disabled people and conform to the good practice guidelines on **accessibility**. For more information on **accessible** computers, see [www.microsoft.com/enable](http://www.microsoft.com/enable) which has resource guides on visual, hearing, mobility and learning impairments and language and speech.

In an effort to create more **accessible** environments for everyone, the list below is meant to be a starting point for discussion rather than a comprehensive audit, please also check legal and other requirements that may apply. Additionally, there are a number of organisations and businesses that specialise in accessibility audits and advice.

*How accessible is your organisation?*

✓ **Physical access – external**

- » Access into main entrance via ramp or lift
- » Steps with handles and railings
- » Signage that is easy to read, well-lit and from all entrances
- » A doorbell or buzzer for assistance if needed (at wheelchair height)

✓ **Physical access – internal**

**Lighting**

- » Adjustable lighting, avoiding flickering lights

**Training and events**

- » Ask all participants at registration (or prior to the event) if they have any access needs
- » Ensure there are adequate and frequent breaks for participants

**Toilets**

- » Toilets accessible to wheelchairs

**Environment**

- » Induction loop that is either integrated into rooms or mobile
- » Sign language interpreters for events
- » Adjustable table and chair height
- » Adjustable air conditioning and ventilation systems
- » Make sure audio-visuals can be seen and heard from all points of the room

✓ **Parking**

- » Dedicated space for ‘disabled parking’

✓ **Written materials**

- » Have larger font sizes available, 12 point should be minimum
- » Use fonts that are easily readable such as Arial
- » Check for high contrast and avoid having two lighter or darker colours together
- » Provide audio transcripts of written materials on request

## 5.4 Race and ethnicity

Britain’s population reflects an incredibly rich mix of **cultures**, religions, ethnicities and nationalities and nowhere is this more apparent than in London. There is often inaccurate use of terms such as ‘ethnic group’ and ‘ethnic origin’ as a way to refer to people from non-white or minority groups. **Ethnicity** refers to a sense of identity arising from membership of a group sharing some or all of the following characteristics: history, language, **culture**, religion, or location. Everyone belongs to an ethnic group and that group may be an ethnic majority or minority, therefore using the term ‘ethnic’ to describe someone’s racial origin is pointless.

‘**Minority ethnic**’ refers to people or groups other than the **White British** majority. The term ‘**Black**’ has shifted in meaning and usage over the last thirty years and mainly refers to **Black British, African-Caribbean**, or African-American people. Some **Asians** identify as **Black** and others do not. The terms ‘**Asian**’ and ‘**South Asian**’ in Britain are

used mainly to refer to people from India, Pakistan and Bangladesh and their **British Asian** descendants. 'South East **Asian**' includes people and their descendants from the Far East. The term '**Black**' does not usually include groups from the Middle East, North Africa or people from mixed origins. It is best to avoid generalisations and refer to an individual's country of origin if known or to ask how each person identifies.

The UK has a population of more than 10% minority ethnic groups. Many city centres and other regions have larger populations of ethnic minority groups. For example, London as a whole is composed of approximately 40% ethnic minority groups (including **White** ethnic minority groups such as Irish) and more than half the total population of many **Black** and **Asian** ethnic minorities reside in London. The following chart (Fig. 4) shows the breakdown of categories of ethnic groups in the UK.

**Figure 4: Ethnic groups in the UK**

Ethnicity	UK Percentage
Asian	5.1%
Black - African	1.2%
Black - Caribbean	1.2%
Black - other	0.2%
Chinese	0.6%
Mixed heritage	1.5%
Other ethnicity	0.6%
White - British	85.3%
White - Irish	1.2%
White - Other	3.0%

**Source:** National Statistics website, 2001 Census, population estimates for 2004. Crown copyright material is reproduced with the permission of the Controller of HMSO.

The largest ethnic minority group in the UK are **South Asians**, consisting mostly of Indian, Bangladeshi and Pakistani people. The 'other' category mainly includes people from Far Eastern Asia such as Japan and the Philippines.

**African-Caribbean:** African-Caribbean has replaced the term Afro-Caribbean to refer to Caribbean peoples and those of Caribbean origin who are of African descent. Generally these two groups of people prefer to be referred to separately.

**Asian/South Asian:** In the UK, 'Asian' generally refers to people from the Asian sub-continent (including India, Pakistan, Bangladesh and Sri Lanka). It is important to keep in mind that this area includes many different cultural and ethnic groups who do not always appreciate being lumped together. The term 'South Asian' is somewhat more precise. 'Asian' on its own generally does not include people from other parts of Asia such as

Vietnam, Korea and Japan. Some people object to being referred to by their 'country of origin' particularly if they have grown up in the UK or identify more as **British**.

**BAME: Black, Asian, Minority Ethnic**, known previously as BME (**Black** or **Minority Ethnic**). **Black** has been used as an inclusive term for ethnic groups who have a common experience of discrimination on the basis of their skin colour.

**Minority Ethnic/ Black and Minority Ethnic (BME):** These terms are commonly used in public policy and in voluntary services. Minority ethnic is preferred to ethnic minority because it stresses that everyone belongs to an ethnic group. Minority ethnic places the emphasis on the minority status rather than the ethnicity, whereas ethnic minority places the emphasis on the minority status of the group.

**Black:** is a term that includes people who experience structural and institutional discrimination because of their skin colour and is often used politically to refer to people of African, Caribbean and **South Asian** origin to imply solidarity. Some **South Asian** people in Britain object to the use of the word being applied to them. Sociologists argue that it also conflates a number of ethnic groups that should be regarded separately. Whilst there are many differences between and within each of the groups, the inclusive term 'Black' refers to those who have a shared history of the negative impacts of colonialism, ethnocentrism and **racism**. It is also important to be aware of the fact that in some contexts "Black" can also be used in a racist or negative sense.

**British:** Hyphenated or twinned designations such as '**Black** British', 'British **Asian**' and 'Chinese British' are becoming more common ways to refer to second and third generation people, many born in Britain, but who wish to retain a sense of their origin. One advantage of such designations is that it avoids a suggestion that a person has to choose only one identity. The idea of 'British-ness' can also imply a false sense of unity. Many Scots, Welsh and Irish resist being identified as 'British' and prefer to maintain a separate identity.

**Diaspora:** In its contemporary use it refers to colonial and post-colonial peoples who have been dislocated to other lands from their countries of origin through the process of voluntary and involuntary **migration**. Often settled for many generations in other countries, people of the Diaspora bring with them unique histories and cultural experiences.

**Ethnocentric:** a tendency to perceive the world from the point of view of one's own **culture**. Ethnocentrism can lead to **racism** when applied to issues of **race**.

**Gypsies, Roma or Travellers:** Roma are an ethnic group of traditionally nomadic people descending from the areas around northern India and Iran. Roma people often speak a dialect of Romani and live all over the world, most living in permanent housing. Roma people in the UK fare particularly poorly on indicators such as health, educational attainment and employment, and experience much discrimination. They have found it

very difficult to gain recognition of the inequalities they experience, partly because of their migratory **culture**. There are also nomadic groups of Irish and 'New Age' 'travellers' who are not part of the Roma ethnic group. The term 'Gypsy' has been used as a slur and is considered offensive by many people.

**Indigenous people:** Under some circumstances this can be used to describe particular ethnic groups originating and remaining in a particular region. The United Nations uses the idea of 'indigenous groups' to obtain rights for native North Americans, Aborigines and other groups whose situation has suffered from invading colonists. In the **British** context, it is not a helpful term since it would be difficult to identify the indigenous **British** in this sense.

**Mixed race:** is a misleading term, as it implies the existence of a 'pure race'. Generally it applies to people who have multiple ethnic identities, such as **White** and **Asian** or African and **Asian**. Alternatives include 'dual heritage'. It should be acknowledged that the idea of being 'mixed race' is informed by a racial discourse that privileges majority ethnicities.

**Race:** is a very controversial notion related to how groups of people are connected by common history, language, physical or cultural traits. While 'race' has no precise legal definition, the related definition of 'ethnic group' as a distinct community by virtue of certain characteristics that help to distinguish the group from the surrounding community is sometimes helpful. The two most important aspects to that definition which are essential are a long shared history and group memory as well as a particular shared set of cultural traditions, customs or religious practices. Other relevant characteristics may include common geographical origin or ancestry, language or literature. There are many difficulties with a definition of race. For example, many Jewish people have not wanted to be defined as a racial or ethnic group but for the purposes of the Race Relations Act, they have been considered to be an ethnic group on the basis of their shared history, as have Sikhs, though Sikhism is a religion. Part of the problem with the definition is the debate over 'race' as a socially constructed notion versus a biological type.

**Racism:** is a belief or ideology that members of various racial or ethnic groups have certain traits that make them inferior or superior to other groups. It is also the associated individual and institutional prejudice and discrimination that goes along with that view. One of the most infamous examples of state-sponsored racism is the now defunct Apartheid regime of South Africa.

**Third World/ Developing World:** has been a term to refer to countries outside of Western Europe and North America in the 'developing world'. It often is used as a euphemism for poor nations or countries with very little global power. An alternative may be 'Global South' or referring to a specific country or region.

**West Indian:** is a term to refer to people from the Caribbean region that at one time were part of the British West Indies, a highly culturally diverse area. **'African-Caribbean'** has

generally replaced it when referring to people of African descent. However, caution must be applied in using this term as it also homogenises distinct groups of people.

**White:** refers to a dominant and often unchallenged cultural space that is presumed to be normative. 'Whiteness' is often associated with an unquestioned position of privilege and power and consciously or unconsciously becomes the point of reference for measuring others.

## 5.5 Religion and belief

Religion and belief is a relatively 'new' equality strand and this category also includes people with no belief as well as agnostics and humanists.

**Figure 5: Religion and belief in the UK**

Religion	Percentage
Buddhist	0.3%
Christian	71.6%
Hindu	1.0%
Jewish	0.5%
Muslim	2.7%
Other	0.3%
Sikh	0.6%
No religion	15.5%
Not stated	7.3%

**Source:** National Statistics website, 2001 Census.

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**Anti-Semitism:** Fear, prejudice, hostility or discrimination directed towards Judaism and/or Jewish people or those perceived to be Jewish. This may take the form of hostility towards the Jewish people as a racial, ethnic or religious group. The most infamous case of institutional anti-Semitism was the Holocaust which occurred during the Second World War by Adolf Hitler's Nazi regime.

**Islamophobia:** Fear, prejudice, hostility or discrimination directed towards Islam and/or Muslims or those perceived to be Muslim. Islamophobia has been expressed in many ways; including violence and abuse against individuals, attacks on mosques or Muslim cemeteries and lack of provision for Muslim people in public institutions.

**Pagan:** previously a term to denote someone of no belief or a 'non-Christian'. This usage is derogatory (unless referring to ancient peoples). Its modern usage refers to people who follow one of the revived Pagan religions (such as Wicca, Druidry or Heathenry) or an indigenous religion (such as Romuva, Vodun or Santeria).

## 5.6 Gender

Many of the words that we use are based on culturally outdated traditions such as using the pronoun 'he' to refer to 'all people'. It is necessary, therefore, to be aware of ways in which selecting **gender neutral terms** actively contributes to promoting **gender equality**. The use of 'he' or 'man' as a generic term for an individual or group is no longer acceptable and often inaccurate. Terms such as 's/he', 'she/he' or 'she or he' are preferable. Many terms are often unnecessarily 'gendered', for example 'forefathers', 'chairman' or 'manpower' could be replaced with 'ancestors', 'chair/convenor' or 'staff'. These terms convey the same meaning yet do not exclude the possibility of women being in that role. Avoid using the terms 'ladies' or 'girls' for women, as this is patronising.

Many words for particular roles have become gendered, and subconsciously shape our beliefs about these areas. For example 'foreman', 'housewife' and 'chairman' often conjure up particular images that are associated with a particular **gender**. A good test is to ask yourself whether you would describe someone of the other sex in the same way, for example if you would not be comfortable calling a man 'housewife', then perhaps it is not an inclusive term appropriate in the equalities realm.

Issues related to **gender**, particularly **transgender** issues, should not be confused with **sexual orientation**, although many people make this mistake. **Trans** people may be of any **sexual orientation** and should not be assumed to be **lesbian** or **gay**, although they may be. **Transgender** people should always be referred to by their chosen gender.

**Gender:** refers to the behavioural, cultural or psychological traits typically associated with the male or female sex. Gender is often distinguished from 'sex' in that it is a socially, rather than biologically constructed definition which continues to be debated.

**Trans/Transgender:** 'trans' people include those who have a **gender** identity which is different to their **gender** assigned at birth and those people who wish to portray their **gender** identity in a different way to their **gender** assigned at birth. It includes people who present themselves differently to the expectations of their **gender** through clothing, accessories, cosmetics or body modification. This tends to be an umbrella term that includes **transsexual** people, drag kings, drag queens and others who live or behave in ways outside of mainstream **gender stereotypes**.

**Transphobia:** the fear of or aversion to people who are **transgender** or who are perceived to be **transgender**. Transphobia in its most violent form has resulted in **hate crimes** against people who do not necessarily fit mainstream **gender stereotypes**.

**Transsexual:** is a somewhat controversial term and perhaps includes fewer people than the broader '**transgender**'. In this instance, transsexual refers to people who consistently live, act and dress in a manner opposite to their **gender** assigned at birth. Some transsexual people have **sex reassignment** surgery in order to adapt their body to their chosen **gender**. It should be noted that this term is not universally accepted by

'**trans**' people and some may find it offensive. Some transsexual people who have had **sex reassignment** therapy are referred to as M to F (male to female) or F to M (female to male).

**Transvestite:** is a person who 'cross dresses' and often refers to men dressing as women. Some men who dress as women are called 'drag queens' and some women who dress as men are referred to as 'drag kings'. There is no connection between transvestitism and **sexual orientation**.

**Sex Reassignment/SRT:** Sex reassignment therapy (SRT) is an umbrella term for any medical procedure regarding sex reassignment. Sometimes SRT is also called 'gender reassignment', although this term is considered inaccurate as SRT alters physical sexual characteristics to more accurately reflect the psychological, social and **gender** identity of the person. SRT can consist of hormone replacement therapy (HRT) to modify secondary sex characteristics, sex reassignment surgery to alter primary sex characteristics or permanent hair removal.

In addition to undergoing medical procedures, **transsexual** people who go through SRT usually change their social **gender** roles, legal names and legal sex designation. The entire process of change from one **gender** to another is called 'transition.'

**Gender-neutral terms:** refers to words or phrases that do not specify a male or female association (such as chairman or housewife) or which do not use **gender** specific terms as a universal. Examples of gender-neutral terms are staffing, partner, chair, actor, councillor, etc. In most cases, gender-neutral terms can replace more offensive gender-specific terms.

## 5.7 Refugees

International law defines a 'refugee' as a person who has fled from and/or cannot return to their country due to a well-founded fear of persecution, including war or civil conflict. The specific definition refers to a person who "owing to a well-founded fear of being persecuted for reasons of **race**, religion, **nationality**, membership of a particular social group, or political opinion, is outside the country of his **nationality**, and is unable to or, owing to such fear, is unwilling to avail himself of the protection of that country..." (*Article 1, The 1951 Convention Relating to the Status of Refugees*).

The most important components of the refugee definition include:

- » Refugees have to be outside their country of origin;
- » The reason for their flight has to be a fear of persecution;
- » The fear of persecution has to be well-founded (i.e. they have to have experienced persecution or be likely to experience it if they return);
- » The persecution has to result from one or more of the 5 grounds listed in the definition and
- » They have to be unwilling or unable to seek the protection of their country.

Refugees run away and often do not know where they will end up. Refugees rarely have the chance to make plans for their departure such as packing personal belongings or saying farewell to loved ones. Many refugees have experienced severe trauma or have been tortured.

The 1951 Convention relating to the Status of Refugees is the key legal document in defining who is a refugee, their rights and the legal obligations of States. The 1967 Protocol removed geographical and temporal restrictions from the Convention. UNHCR advocates that governments adopt a rapid, flexible and liberal process for determining who is a refugee, recognising how difficult it often is to document persecution.

In the UK, the Home Office recognises refugee status and grants asylum when they consider that someone falls within the 1951 UN Convention definition of a refugee. People deemed to be refugees are automatically given Indefinite Leave to Remain (ILR). There is no limit on the time they may stay in the UK. In most cases, they may apply for **British** citizenship five years after their arrival in the UK, are entitled to a UN Convention Travel Document in the meantime and also to apply for family reunification.

The term 'refugee' has slipped into common usage to cover a range of people who often do not fit the legal definition of a refugee, such as people displaced by natural disasters or environmental change or many other **migrant** groups.

**Asylum seekers: Refugees** should not be confused with asylum seekers because the two terms have different legal definitions. An asylum seeker is a person who has left their country of origin, has applied for recognition as a refugee in another country and is awaiting a decision on their application.

In the UK, the number of asylum applications submitted has generally fallen over the last decade, where the highest level of applications was received in 2002 but fell significantly in subsequent years. It is worth noting that 2008 is the first year since 2002 when an increase has been observed in the number of asylum applications received.

**Figure 6: Top ten applicant nationalities in the UK, 2008**

Country of Origin	Percentage
Afghanistan	14%
Zimbabwe	12%
Iran	9%
Eritrea	9%
Iraq	7%
Sri Lanka	6%
China	5%
Somalia	5%
Pakistan	5%
Nigeria	3%

**Source:** Home Office Asylum Statistics, 2008.

**Economic refugee:** is an inaccurate term. The correct description of people who leave their country or place of residence because they want to seek a better life is **'economic migrant'**.

**Economic migrants:** make a conscious choice to leave their country of origin and can return there without a problem. If things do not work out as they had hoped, it is safe for them to return home.

**Environmental refugee/environmental migrant:** there are currently 12 million refugees around the world. There are approximately double that number of people who have fled because of floods, famine and other environmental disasters. Although there are similarities between the two groups, they should not be confused. Refugees cannot turn to their own governments for protection because states are often the source of persecution and they therefore need international assistance, whereas those fleeing natural disasters continue to enjoy national protection whatever the state of the landscape. Therefore, in order not to cloud the distinction between the two groups, those fleeing for environmental reasons should be considered 'environmental migrants'.

**Illegal immigrant: migrants** who do not have the proper legal documentation or visa to enter or remain in the UK are sometimes referred to as 'illegal immigrants' or 'undocumented workers'. Many governments refuse to issue passports to known political dissidents or imprison them if they apply. **Refugees** may not be able to obtain the necessary documents when trying to escape and may have no choice but to resort to illegal means of escape. Therefore although the only means of escape for some may be illegal entry and/or the use of false documentation, if the person has a well-founded fear of persecution they should be viewed as a **refugee** and not labelled an 'illegal immigrant'. Under Article 14 of the Universal Declaration of Human Rights, everyone has the right to

seek and enjoy asylum. In addition, Article 13 of the 1951 Convention Relating to the Status of Refugees states that countries should not impose penalties on individuals coming directly from a territory where their life or freedom is threatened on account of their illegal entry.

**Internally Displaced Persons (IDP):** an IDP may have been forced to flee their home for the same reasons as a refugee, but has not crossed an internationally recognised border. Many IDPs are in refugee-like situations and face the same problems as refugees. There are more IDPs in the world than refugees. Globally, there are an estimated 20-25 million so-called IDPs.

**Humanitarian protection:** From 2003 in the UK, 'exceptional leave to remain' was replaced by 'Humanitarian Protection' for new asylum applicants who do not meet the criteria of the 1951 Convention yet still require protection on human rights grounds. 'Humanitarian Protection' will be granted for three years, after which it will be reviewed and if continued protection is required, 'Indefinite Leave to Remain' will be granted. There is also a new category of 'Discretionary Protection', used in cases where it would be inappropriate or unlawful to return someone to their country of origin.

**Temporary protection:** In the event of arrival of a large group of people from a particular country seeking asylum because of persecution or upheaval, determination of refugee status may be temporarily suspended and 'temporary protection' granted. Individual Kosovo Albanians were granted temporary protection in 1999 as were Bosnian Muslims during the Bosnian conflict from 1992 to 1995.

**NOTE:** most of the information from this section was taken directly from the United Nations High Commissioner for Refugees (UNHCR) website in the UK (2007), which can be found at [www.unhcr.org.uk](http://www.unhcr.org.uk). Due to the nature of the many legal definitions, much of the wording was kept intact and the UNHCR as the source of the information is hereby acknowledged.

## 5.8 Sexual orientation

Language can reinforce the exclusion felt by many **lesbians, gay** men and **bisexuals** (LGB), often by the assumption that everyone is **heterosexual**. LGB people often feel tremendous levels of anxiety in professional or personal situations, especially if they are not '**out**' or if they are in a situation with **heterosexual** people that they do not know very well. This is partly because of the invisible nature of **sexual orientation**, where LGB people often go unnoticed and inadvertently hear offensive and **homophobic** remarks.

As equal members of society, LGB people should be described in terms that are not demeaning, sensational or derogatory. The term 'homosexual' is generally not now used, as it has medical and derogatory connotations and is often considered as a reference only to men. Avoid negative **stereotyping** that perpetuates the myths that LGB people

are less likely to be in stable relationships or would not make good parents. Use 'partner' instead of spouse routinely in order to avoid assuming that everyone is in a **heterosexual** couple or part of a 'traditional' family. This will also be inclusive of unmarried **heterosexual** couples.

**Bisexual:** a person who has significant sexual or romantic attractions to members of their same **gender** and/or a different **gender**, or who identifies as a member of the bisexual community. Contrary to popular myths, bisexual people do not necessarily date women and men at the same time, often choosing to be with one partner in a monogamous relationship while maintaining a 'bisexual identity'.

**Coming Out (of the closet):** when a person discloses their **sexual orientation** to others or themselves. This is sometimes meant as the first time in a person's life when they realize that they are **gay, lesbian** or **bisexual** and initially tell their family and friends. It is also meant as a lifelong process for **LGBT** people, as 'coming out' is a decision that must be made throughout the course of everyday life for most people. While some people 'come out' when they are very young, others may not 'come out' until they are much older. Being 'out' for **LGBT** people refers to a person who has shared their identity with friends or family.

**Gay:** a person who has significant sexual or romantic attractions primarily to members of the same **gender** or who identifies as a member of the gay community. This term is often used as a synonym for a gay man. **Lesbians** and **Bisexuals** often do not feel included by this term.

**Heterosexism:** is prejudice or discrimination by **heterosexual** people (or institutions) against **lesbian, gay** or **bisexual** people based on the assumption that everyone is or should be **heterosexual**.

**Heterosexual:** people who have a significant sexual or romantic attraction primarily to people of the opposite **gender** or who identify as a member of the 'straight' community. Also known as 'straight' or 'hetero'.

**Homophobia:** the fear of, aversion to or discrimination against people who are **LGBT** or who are perceived to be **LGBT**. Homophobia in its most violent form has resulted in **hate crimes** against people who do not necessarily fit mainstream roles.

**Lesbian:** a woman who has significant sexual or romantic attractions primarily to other women or who identifies as a member of the lesbian community.

**LGBT: Lesbian, Gay, Bisexual** and/or **Transgender**.

**Queer:** a controversial term currently used to describe an array of people who do not identify as heterosexual. This term was initially used as a slur against **LGBT** people and

has only recently been reclaimed internally by some LGBT people. It is not appropriate for heterosexual people to use this term and not all **LGBT** people feel comfortable using the word.

**Sexual Orientation:** an individual's natural and/or chosen preference with respect to **heterosexual**, homosexual and **bisexual** feelings and behaviour.

## 5.9 Timeline of key events in recent equalities history

DATE	Event
1946	National Insurance Act introduces universal pensions; National Association for Mental Health founded
1948	British Nationality Act; Windrush docks marking the start of a significant wave of immigration to the UK; National Health Service established; National Assistance Board established
1951	Gypsy Charter published
1954	Wolfenden Committee on Prostitution and Homosexual Offences established; Trial of Pitt Rivers, Montagu and Wildeblood for homosexuality
1955	Equal pay for women in public service
1956	Sexual Offences Act established
1958	Riots in Nottingham and London against 'West Indian' people; West Indian Standing Conference formed; Homosexual Law Reform Society Founded
1959	Mental Health Act
1961	Help the Aged founded
1962	Commonwealth Immigrants Act limits right of entry; Federation of Student Islamic Societies founded
1963	Minorities Research Group founded
1964	Campaign Against Racial Discrimination founded
1965	Race Relations Act establishes Race Relations Board; First Gypsy Census in England & Wales; Disablement Income Group founded
1966	Gypsy Council founded
1967	Sexual Offences Act decriminalizes homosexuality; Abortion Act legalises abortion
1968	Commonwealth Immigrants Act restricts immigration; Race Relations Act establishes Community Relations Commission

<b>1969</b>	Divorce Reform Act establishes no-blame divorce; Women's National Council founded; Stonewall riots in New York; Committee for Homosexual Equality formed
<b>1970</b>	Union of Muslim Organisations in UK founded; Equal Pay Act (comes into force 1975); Women's Liberation Movement conference; Chronically Sick & Disabled Persons Act; Education (Handicapped Children) Act expands community care
<b>1971</b>	Immigration Act further restricts Commonwealth citizens' right of entry; First Women's Refuge founded; First Gay Rights march
<b>1972</b>	Expulsion of Ugandan Asians
<b>1974</b>	National Transvestite & Transsexual conference; Community Health Councils formed; Disability Alliance founded
<b>1975</b>	Sex Discrimination Act creates Equal Opportunities Commission; Chronically Sick & Disabled Persons (Amendment) Act; Sexual Reform Bill published
<b>1976</b>	Race Relations Act establishes Commission for Racial Equality; Riots at Notting Hill Carnival; Domestic Violence & Matrimonial Proceedings Act; Sexual Offences (Scotland) Act reinforces criminalization of homosexuality
<b>1977</b>	Anti-Nazi League formed;
<b>1978</b>	Disability Information & Advice Line founded
<b>1979</b>	Self Help Association for Transsexuals formed
<b>1980</b>	Criminal Justice (Scotland) Act decriminalizes homosexuality; Northern Ireland laws ruled in breach of ECHR
<b>1981</b>	British Nationality Act introduces three classes of citizenship
<b>1982</b>	Terence Higgins Trust founded
<b>1983</b>	First government report on AIDS
<b>1984</b>	Imams & Mosques Council of Great Britain & Council of Mosques in UK & Eire founded
<b>1985</b>	Broadwater Farm riots; Law Commission recommends changing Blasphemy Laws
<b>1986</b>	Disabled Persons (Services, Consultation & Representation) Act provides more involvement in local service provision

<b>1988</b>	Campaign against Age Discrimination in Employment founded; <i>The Satanic Verses</i> controversy; UK Action Committee on Islamic Affairs
<b>1989</b>	Romany Gypsies recognised as ethnic minority
<b>1990</b>	Commitment to equalize male & female pension ages; National Health & Community Care Act requires inspections, complaints procedures & Community Care Plans
<b>1993</b>	Murder of Stephen Lawrence
<b>1994</b>	Age of consent for Gay men reduced to 18; Hindu Council formed
<b>1995</b>	Disability Discrimination Act outlaws direct discrimination; Carers (Recognition & Services) Act provides for assessment of carers; Mental Health (Patients in the Community) Act tightens law
<b>1996</b>	Employment tribunal ruling on freedom to observe Islamic festivals; Community Care (Direct Payments) Act enables disabled people to buy services
<b>1997</b>	Muslim Council of Britain formed; First Muslim MP elected
<b>1998</b>	Human Rights Act (into effect 2000);
<b>1999</b>	Macpherson Report identifies institutional racism in the Met; <i>Admiral Duncan (Gay)</i> pub bombing; Ban lifted on Gays & Lesbians in armed forces; Sex Discrimination (Gender Reassignment) Regulations protect Transgender people against employment discrimination; Disability Rights Commission Act establishes DRC
<b>2000</b>	Race Relations (Amendment) Act imposes duty to promote good race relations; Irish Travellers recognised as ethnic minorities
<b>2001</b>	Bombing of the Twin Towers in New York; Age of consent for Gay men reduced to 16; Special Educational Needs & Disability Act extends obligation to assist independent living
<b>2002</b>	Employment Act introduces flexible working; Equal rights for same sex couples applying to adopt; UK ruled in breach of ECHR re: Transgender people's rights

<b>2003</b>	Employment Equality (Religion & Belief) Act bans workplace discrimination; Equal Pay reviews introduced in government departments; Section 28 repealed in England & Wales; Employment Equality (Sexual Orientation) Regulations outlaw workplace discrimination; Government's <i>New Deal for the Disabled</i>
<b>2004</b>	'Gay' offences of buggery and gross indecency abolished; Gender Recognition Act gives Transsexuals legal right to live in acquired gender; Civil Partnership Act enables same-sex couples to have same rights & responsibilities as married couples
<b>2005</b>	London tube suicide bombings; Disability Discrimination Act builds on & extends earlier legislation
<b>2006</b>	Equality Act enables creation of Commission for Equality & Human Rights; Employment Equality (Age) Regulations ban workplace discrimination; Racial & Religious Hatred Act creates offence of inciting religious hatred'; Schools White Paper commits to end inequality of opportunity and outcomes; Public sector Duty for Gender Equality;
<b>2007</b>	Commission for Equality and Human Rights is formed

**Source:** *The Equalities Review, 2007.*

## 6. Useful contacts

### Organisations

#### Advisory Conciliation and Arbitration Service (ACAS)

Have a clear and concise Equalities section on their website for employers and employees. Their publication “Review your Equality Policy and Action Plan” has a table of ‘Key Equality issues’, and your responsibilities as an employer around each one.

#### Acas National

Brandon House  
180 Borough High Street  
London, SE1 1LW  
Tel: 08457 47 47 47  
Minicom: 08456 06 16 00  
[www.acas.org.uk](http://www.acas.org.uk)

#### BASSAC

33 Corsham Street  
London, N1 6DR  
Tel: 0207 336 9417  
Email: [info@bassac.org.uk](mailto:info@bassac.org.uk)  
[www.bassac.org.uk](http://www.bassac.org.uk)

#### Charities Evaluation Service

4 Coldbath Square  
London, EC1R 5HL  
Tel: 020 7713 5722  
Email: [enquiries@ces-vol.org.uk](mailto:enquiries@ces-vol.org.uk)  
[www.ces-vol.org.uk](http://www.ces-vol.org.uk)

#### Communities and Local Government

Eland House, Bressenden Place  
London, SW1E 5DU  
Tel: 020 7944 4400  
[www.communities.gov.uk](http://www.communities.gov.uk)

#### Directory of Social Change

24 Stephenson Way  
London, NW1 2DP  
Tel: 020 7391 4800  
Email: [enquiries@dsc.org.uk](mailto:enquiries@dsc.org.uk)  
[www.dsc.org.uk](http://www.dsc.org.uk)

#### Equality & Diversity Forum

207-221 Pentonville Road  
London, N1 9UZ  
Tel: 0207 843 1597  
Email: [info@edf.org.uk](mailto:info@edf.org.uk)  
[www.edf.org.uk](http://www.edf.org.uk)

#### Equality and Human Rights Commission (EHRC)

The EHRC has four main offices in Manchester, London, Cardiff and Glasgow.  
[www.equalityhumanrights.com](http://www.equalityhumanrights.com)

London:  
3 More London, Riverside Tooley Street  
London, SE1 2RG  
Tel: 020 3117 0235  
(non helpline calls only)  
[info@equalityhumanrights.com](mailto:info@equalityhumanrights.com)

Helpline:  
0845 604 6610 - England main number  
0845 604 6620 - England textphone

#### Government Equalities Office

5th Floor, Eland House  
Bressenden Place  
London, SW1E 5DU  
Tel: 0207 944 4400  
Email: [ministers@dwp.gsi.gov.uk](mailto:ministers@dwp.gsi.gov.uk)  
[www.womenandequalityunit.gov.uk/about/index.html](http://www.womenandequalityunit.gov.uk/about/index.html)

## **HEAR**

London's equality and human rights network

[www.wrc.org.uk/hear](http://www.wrc.org.uk/hear)

## **London Voluntary Service Council**

Tel: 020 7700 8115

[www.lvsc.org.uk](http://www.lvsc.org.uk)

## **National Association for Voluntary and Community Action**

The Tower, 2 Furnival Square  
Sheffield, S1 4QL

Tel: 0114 278 6636

Textphone 0114 278 7025

[www.navca.org.uk](http://www.navca.org.uk)

## **National Council for Voluntary Organisations (NCVO)**

Regent's Wharf, 8 All Saints Street  
London, N1 9RL

Freephone: 0800 2 798 798

Textphone: 0800 01 88 111 (minicom)

Main Switchboard Tel: 020 7713 6161

Email: [ncvo@ncvo-vol.org.uk](mailto:ncvo@ncvo-vol.org.uk)

[www.ncvo-vol.org.uk](http://www.ncvo-vol.org.uk)

## **National Equality Partnership**

Women's Resource Centre

33-41 Dallington Street

London, EC1V 0BB

Tel: 020 7324 3030

Email: [equality@wrc.org.uk](mailto:equality@wrc.org.uk)

[www.improvingsupport.org.uk/equality](http://www.improvingsupport.org.uk/equality)

## **Office of the Third Sector**

35 Great Smith Street,

London, SW1P 3BQ

Tel: 020 7276 6400

Email: [OTS.info@cabinet-office.x.gsi.gov.uk](mailto:OTS.info@cabinet-office.x.gsi.gov.uk)

[www.cabinetoffice.gov.uk/third\\_sector.aspx](http://www.cabinetoffice.gov.uk/third_sector.aspx)

## **Olmec**

47-49 Durham Street

London SE11 5JA

Tel: 0845 88 00 110

[info@olmec-ec.org.uk](mailto:info@olmec-ec.org.uk)

[www.olmec-ec.org.uk](http://www.olmec-ec.org.uk)

Their "Guide to Equality and Diversity in the Third Sector" is a good one-stop guide to the law around equalities. It was published in 2008 with updates in 2010.

## **Regional Action and Involvement South East**

Bridge House

1 Walnut Tree Close, Guildford

Surrey GU1 4UA

Tel: 01483 885266

[www.raise-networks.org.uk](http://www.raise-networks.org.uk)

## **Trade Union Congress**

Congress House

Great Russell Street

London, WC1B 3LS

Tel: 020 7636 4030

[www.tuc.org.uk](http://www.tuc.org.uk)

## **General Resources**

Fairness and Freedom: the Final Report of the Equalities Review and (The Equalities Review Team) (2007)

<http://archive.cabinetoffice.gov.uk/equalitiesreview/>

Tackling Discrimination and Promoting Equality (ACAS)

[www.acas.org.uk/CHttpHandler.ashx?id=318&p=0](http://www.acas.org.uk/CHttpHandler.ashx?id=318&p=0)

## Equality Audits

How to do an Equality Audit (Diversity Works for London)

[www.diversityworksforlondon.com/server/show/nav.00600b003](http://www.diversityworksforlondon.com/server/show/nav.00600b003)

Equality Audit (TUC)

[www.tuc.org.uk/equality/index.cfm?mins=440](http://www.tuc.org.uk/equality/index.cfm?mins=440)

## Benchmarking

Rudkin, S (2008) Benchmarking Made Simple: a step-by-step guide (Performance Hub: London)

[www.ces-vol.org.uk/downloads/benchmarkingmadesimple-231-238.pdf](http://www.ces-vol.org.uk/downloads/benchmarkingmadesimple-231-238.pdf)

## Monitoring

Guidance on age and the workplace: a guide for employers (ACAS)

[www.acas.org.uk/CHttpHandler.ashx?id=588&p=0](http://www.acas.org.uk/CHttpHandler.ashx?id=588&p=0)

Monitoring: How to monitor sexual orientation in the workplace (Stonewall)

[www.stonewall.org.uk/workplace/1473.asp](http://www.stonewall.org.uk/workplace/1473.asp)

## Outcomes

Cupitt, S. & Ellis, J. (2007) Your Project and Its Outcomes (Charities Evaluation Service: London)

[www.ces-vol.org.uk/downloads/yourprojectanditsoutcomes-139-146.pdf](http://www.ces-vol.org.uk/downloads/yourprojectanditsoutcomes-139-146.pdf)

Outcomes online (Charities Evaluation Service)

[www.ces-vol.org.uk/index.cfm?pg=116](http://www.ces-vol.org.uk/index.cfm?pg=116)

## Conflict Management

Centre for Effective Dispute Resolution  
International Dispute Resolution Centre

70 Fleet Street

London EC4Y 1EU

Tel: (0)20 7536 6000

[www.cedr.com](http://www.cedr.com)

## Quality Standards

### Committed to Equality

Angel House

Portland Square

Bakewell, DE45 1HB

Tel: 01629 815777

Email: [diversityassured@c2e.co.uk](mailto:diversityassured@c2e.co.uk)

[www.c2e.co.uk](http://www.c2e.co.uk)

### Investing in Volunteers at Volunteering England

Regents Wharf

8 All Saints Street

London, N1 9RL

Tel: +44 (0)845 305 6979

Email: [iiv@volunteeringengland.org](mailto:iiv@volunteeringengland.org)

[www.investinginvolunteers.org.uk](http://www.investinginvolunteers.org.uk)

### Investors in Diversity at the National Centre for Diversity

C/o Trinity All Saints

Brownberrie Lane

Leeds, LS18 5HD

Tel: 0113 2837100

Email: [miriam@nationalcentrefordiversity.com](mailto:miriam@nationalcentrefordiversity.com)

[nationalcentrefordiversity.com](http://nationalcentrefordiversity.com)

[www.nationalcentrefordiversity.com](http://www.nationalcentrefordiversity.com)

### Investors in People

7-10 Chandos Street

London, W1G 9DQ

Tel: 0207 467 1900

[www.investorsinpeople.co.uk](http://www.investorsinpeople.co.uk)

## **Matrix Standard EMQC Ltd**

Pentagon House  
Third Floor South Wing  
Sir Frank Whittle Road  
Pentagon Island  
Derby, DE21 4XA  
Tel: 01332 866 902  
Email: [bookings@emqc.co.uk](mailto:bookings@emqc.co.uk)  
[www.matrixstandard.com](http://www.matrixstandard.com)

## **PQASSO**

Charities Evaluation Service  
4 Coldbath Square  
London, EC1R 5HL  
Tel: 020 7713 5722  
[enquiries@ces-vol.org.uk](mailto:enquiries@ces-vol.org.uk)  
[www.ces-vol.org.uk](http://www.ces-vol.org.uk)

Diversity Excellence Model (National  
School of Government)  
[www.nationalschool.gov.uk/  
organisational\\_development/Diversity/  
diversity\\_excellence\\_model/index.asp](http://www.nationalschool.gov.uk/organisational_development/Diversity/diversity_excellence_model/index.asp)

Quality Assurance System for Refugee  
Organisations (Refugee Council)  
[www.refugeecouncil.org.uk/practice/  
support/quality.htm1](http://www.refugeecouncil.org.uk/practice/support/quality.htm1)

## **Human Rights**

### **Amnesty International UK**

The Human Rights Action Centre  
17-25 New Inn Yard  
London, EC2A 3EA  
Tel: 020 7033 1500  
Textphone +44 (0) 20 7033 1664  
Email [sct@amnesty.org.uk](mailto:sct@amnesty.org.uk)  
[www.amnesty.org.uk](http://www.amnesty.org.uk)

## **British Institute of Human Rights**

School of Law, King's College London  
26-29 Drury Lane  
London, WC2B 5RL  
Tel: 0207 848 1818  
[info@bihr.org.uk](mailto:info@bihr.org.uk)  
[www.bihar.org.uk](http://www.bihar.org.uk)

## **Liberty**

21 Tabard Street  
London, SE1 4LA  
Tel: 020 7403 3888  
[www.liberty-human-rights.org.uk](http://www.liberty-human-rights.org.uk)

## **Resources**

Your Human Rights: a Guide for People  
Living with Mental Health Problems (British  
Institute of Human Rights) (2006)  
[www.bihar.org/downloads/guide/bihar\\_  
mental-health\\_guide.pdf](http://www.bihar.org/downloads/guide/bihar_mental-health_guide.pdf)

Your Human Rights: a Guide for Disabled  
People (British Institute of Human Rights)  
(2006)  
[www.bihar.org/downloads/guide/bihar\\_  
disabled\\_guide.pdf](http://www.bihar.org/downloads/guide/bihar_disabled_guide.pdf)

Your Human Rights: a Guide for Older  
People (British Institute of Human Rights)  
(2006)  
[www.bihar.org/downloads/guide/bihar\\_  
older-people\\_guide.pdf](http://www.bihar.org/downloads/guide/bihar_older-people_guide.pdf)

Your Human Rights: a Guide for Refugees  
and Asylum Seekers (British Institute of  
Human Rights) (2006)  
[www.bihar.org/downloads/guide/bihar\\_  
refugee\\_guide.pdf](http://www.bihar.org/downloads/guide/bihar_refugee_guide.pdf)

## Equalities Duties

### Public Law Project

150 Caledonian Road  
London, N1 9RD  
Tel: 0207 697 2190  
e-mail: [admin@publiclawproject.org.uk](mailto:admin@publiclawproject.org.uk)  
[www.publiclawproject.org.uk](http://www.publiclawproject.org.uk)

## Gender

### Fawcett Society

1-3 Berry Street  
London, EC1V 0AA  
Tel: 020 7253 2598  
[www.fawcettsociety.org.uk](http://www.fawcettsociety.org.uk)

### Opportunity Now

137 Shepherdess Walk  
London  
N1 7RQ  
Tel: 0207 566 8650  
Fax: 020 7253 1877  
[www.opportunitynow.org.uk](http://www.opportunitynow.org.uk)

### Women and Equality Unit

5th Floor, Eland House  
Bressenden Place  
London, SW1E 5DU  
Tel: 0207 944 4400  
Email: [ministers@dwp.gsi.gov.uk](mailto:ministers@dwp.gsi.gov.uk)  
[www.womenandequalityunit.gov.uk](http://www.womenandequalityunit.gov.uk)

### Women's Resource Centre

33-41 Dallington Street,  
London, EC1V 0BB  
Tel: 020 7324 3030  
[www.wrc.org.uk](http://www.wrc.org.uk)

## Resources

Gender Equality Duty: Code of Practice England and Wales (Equal Opportunities Commission) (2006)

[http://equalityhumanrights.com/uploaded\\_files/gender\\_equality\\_duty\\_code\\_of\\_practice\\_england\\_and\\_wales.pdf](http://equalityhumanrights.com/uploaded_files/gender_equality_duty_code_of_practice_england_and_wales.pdf)

Why Women? (Women's Resource Centre) (2006)

[www.wrc.org.uk/downloads/WRC%20Why%20Women%20Report.pdf](http://www.wrc.org.uk/downloads/WRC%20Why%20Women%20Report.pdf)

Shaping a Fairer Future (Women and Work Commission)

[www.womenandequalityunit.gov.uk/publications/wwc\\_shaping\\_fairer\\_future06.pdf](http://www.womenandequalityunit.gov.uk/publications/wwc_shaping_fairer_future06.pdf)

Enforcing the Gender Equality Duty: a Toolkit for Individuals (Equality and Human Rights Commission)

[www.equalityhumanrights.com/en/forbusinessesandorganisation/publicauthorities/Gender\\_equality\\_duty/Pages/EnforcingtheGenderEqualityDuty-AToolkitforIndividuals.aspx](http://www.equalityhumanrights.com/en/forbusinessesandorganisation/publicauthorities/Gender_equality_duty/Pages/EnforcingtheGenderEqualityDuty-AToolkitforIndividuals.aspx)

Where are Women in Local Strategic Partnerships (Women's Resource Centre, Oxfam & Urban Forum)

[www.wrc.org.uk/downloads/Polycystuff/womenlsp.pdf](http://www.wrc.org.uk/downloads/Polycystuff/womenlsp.pdf)

See Both Sides: A Practical Guide to Gender Analysis for Quality Service Delivery (Oxfam)

[www.publications.oxfam.org.uk/oxfam/display.asp?K=9780855985370&sf\\_01=CTITLE&st\\_01=See+both+Sides&sort=SORT\\_DATE/D&x=18&y=5&m=1&dc=1#contents](http://www.publications.oxfam.org.uk/oxfam/display.asp?K=9780855985370&sf_01=CTITLE&st_01=See+both+Sides&sort=SORT_DATE/D&x=18&y=5&m=1&dc=1#contents)

## Gender Identity

### The Beaumont Society

27 Old Gloucester Street  
London, WC1N 3XX  
Tel: 01582 412220  
Helpline: 0700 0287878  
Email: [enquiries@beaumontsociety.org.uk](mailto:enquiries@beaumontsociety.org.uk)  
**www.beaumontsociety.org.uk**

### FTM Network

BM Network  
London, WC1N 3XX  
Tel: 0161 432 1915  
**www.ftm.org.uk**

### Gendered Intelligence

**www.genderedintelligence.co.uk**

### The Gender Identity Research and Education Society

Melverly, The Warren  
Ashted  
Surrey, KT21 2SP  
Tel: 01372 801 554  
Email: [admin@girestrust.org.uk](mailto:admin@girestrust.org.uk)  
**www.gires.org.uk**

### The Gender Trust

Community Base  
113 Queens Road  
Brighton, BN1 3XG  
Tel: 01273 234 024  
Helpline: 0845 231 0505  
Email: [info@gendertrust.org.uk](mailto:info@gendertrust.org.uk)  
**www.gendertrust.org.uk**

### Gendys Network

Gendys Network  
BM Gendys  
London, WC1N 3XX  
[gendys@gender.org.uk](mailto:gendys@gender.org.uk)  
**www.gender.org.uk/gendys/index.htm**

### Mermaids

BM Mermaids  
London, WC1N 3XX  
Helpline: 0208 1234819  
**www.mermaidsuk.org.uk**

### Press for Change

**www.pfc.org.uk/**

### Resources

Engendered Penalties: Transgender and Transsexual People's Experience of Inequality and Discrimination (Whittle, S et al. for the Equalities Review) (2007)  
**<http://archive.cabinetoffice.gov.uk/equalitiesreview/upload/assets/www.theequalitiesreview.org.uk/transgender.pdf>**

Gender Reassignment: a Guide for Employers (Women and Equality Unit)  
**[www.womenandequalityunit.gov.uk/publications/gender\\_reassignment\\_guide05.pdf](http://www.womenandequalityunit.gov.uk/publications/gender_reassignment_guide05.pdf)**

Meeting the Gender Duty for Transsexual Staff (Equal Opportunities Commission)  
**<http://83.137.212.42/sitearchive/eoc/Default6fe3.html?page=19962>**

Gender Reassignment: Guidance for Managers and Supervisors (Equal Opportunities Commission)  
**<http://83.137.212.42/sitearchive/eoc/Defaultcb48.html?page=15397>**

Transsexualism and Gender Reassignment: Recommendations for Management Guidelines (The Gender Trust)  
**[www.gendertrust.org.uk/html/workplace.htm](http://www.gendertrust.org.uk/html/workplace.htm)**

## Sexual Orientation

### The Bisexual Index

Tel: 020 3411 3351

[www.bisexualindex.org.uk](http://www.bisexualindex.org.uk)

### Broken Rainbow LGBT Domestic Violence Service UK

Helpline for survivors: 0845 260 4460

Helpline for agencies: 0845 260 5560

Minicom: 0207 231 3884

Email: [mail@broken-rainbow.org.uk](mailto:mail@broken-rainbow.org.uk)

[www.broken-rainbow.org.uk](http://www.broken-rainbow.org.uk)

### Consortium of LGBT Voluntary and Community Organisations

J111 Tower Bridge Business Complex

100 Clements Road

London, SE16 4DG

Tel: 020 7064 8383

Email: [information@lgbtconsortium.org.uk](mailto:information@lgbtconsortium.org.uk)

[www.lgbtconsortium.org.uk](http://www.lgbtconsortium.org.uk)

### Families and Friends of Lesbian and Gays

7 York Court

Wilder Street

Bristol, BS2 8HQ

Central Helpline: 0845 652 0311

Email: [info@fflag.org.uk](mailto:info@fflag.org.uk)

[www.fflag.org.uk](http://www.fflag.org.uk)

### Galop

2G Leroy House

London, N1 3QP

Tel: 0207 704 6767

Email: [info@galop.org.uk](mailto:info@galop.org.uk)

[www.galop.org.uk](http://www.galop.org.uk)

### UK Lesbian and Gay Immigration Group

32-36 Loman Street

London, SE1 0EH

Tel: +44 (0)20 7922 7812

[www.uklgig.org.uk](http://www.uklgig.org.uk)

### Imaan

28 Commercial Street

London, E1 6LS

Tel: 07849 170793

Email: [info@imaan.org.uk](mailto:info@imaan.org.uk)

[www.imaan.org.uk](http://www.imaan.org.uk)

### Kairos in Soho

Unit 10, 10-11 Archer Street

London, W1D 7AZ

Tel: 020 7437 6063

[info@kairosinsoho.org.uk](mailto:info@kairosinsoho.org.uk)

[www.kairosinsoho.org.uk](http://www.kairosinsoho.org.uk)

### Polari

(Please note that Polari has closed and a new organisation called Age of Diversity is being formed. The Polari website will still exist as an archive and the email address below is for the new group.)

Email: [ageofdiversity@googlemail.com](mailto:ageofdiversity@googlemail.com)

[www.casweb.org/polari](http://www.casweb.org/polari)

### Queer Youth Alliance

[www.queeryouth.org.uk](http://www.queeryouth.org.uk)

### The Safra Project

PO Box 45079

London, N4 3YD

Email: [info@safraproject.org](mailto:info@safraproject.org)

[www.safraproject.org](http://www.safraproject.org)

## Schools Out

BM Schools Out National  
London, WC1N 3XX  
[www.schools-out.org.uk](http://www.schools-out.org.uk)

## Stonewall

Tower Building, York Road  
London, SE1 7NX  
Tel: 020 7593 1850  
Info Line: 08000 50 20 20  
Minicom: 020 7633 0759  
Email: [info@stonewall.org.uk](mailto:info@stonewall.org.uk)  
[www.stonewall.org.uk](http://www.stonewall.org.uk)

## Resources

Sexual Orientation in the Workplace: a  
Guide for Employers and Employees.  
(ACAS)  
[www.acas.org.uk/media/pdf/e/n/  
sexual\\_1.pdf](http://www.acas.org.uk/media/pdf/e/n/sexual_1.pdf)

LGBT Equality in the Workplace (TUC)  
[www.tuc.org.uk/equality/tuc-11663-f0.  
pdf](http://www.tuc.org.uk/equality/tuc-11663-f0.pdf)

Sexual Orientation Employer Handbook  
(Stonewall)  
[www.stonewall.org.uk/workplace/1471.  
asp](http://www.stonewall.org.uk/workplace/1471.asp)

Guidance on new measures to outlaw  
discrimination on the grounds of sexual  
orientation in the provision of goods,  
facilities and services (Communities and  
Local Government)  
[www.communities.gov.uk/publications/  
communities/guidancenew](http://www.communities.gov.uk/publications/communities/guidancenew)

The Colour of Your Money: A Guide to New  
Protections for Gay People (Stonewall)  
[www.stonewall.org.uk/documents/the\\_  
colour\\_of\\_your\\_money\\_final.pdf](http://www.stonewall.org.uk/documents/the_colour_of_your_money_final.pdf)

Civil Partnership: Advice for Employers  
(Women and Equality Unit)  
[www.womenandequalityunit.gov.  
uk/civilpartnership/partnership\\_  
employers\\_advice05.doc](http://www.womenandequalityunit.gov.uk/civilpartnership/partnership_employers_advice05.doc)

The Whole of Me: A Resource Pack (Age  
Concern England)  
[www.ageconcern.org.uk/AgeConcern  
EB6D33A870764D82931  
896AF798882B9.asp](http://www.ageconcern.org.uk/AgeConcernEB6D33A870764D82931896AF798882B9.asp)

Opening Doors – A Resource Pack (Age  
Concern England)  
[www.ageconcern.org.uk/AgeConcern/  
EB6D33A870764D8293  
1896AF798882B9.asp](http://www.ageconcern.org.uk/AgeConcern/EB6D33A870764D82931896AF798882B9.asp)

## Age

### The Age Employment Network

207-221 Pentonville Road  
London, N1 9UZ  
Tel: 0207 843 1590  
Email: [info@taen.org.uk](mailto:info@taen.org.uk)  
[www.taen.org.uk](http://www.taen.org.uk)

### Age UK (formerly Age Concern and Help the Aged)

FREEPOST (SWB 30375)  
Ashburton Devon  
TQ13 7ZZ  
Tel: 0800 00 99 66  
[www.ageconcern.org.uk](http://www.ageconcern.org.uk)  
[www.helptheaged.org.uk](http://www.helptheaged.org.uk)

### **British Youth Council**

The Mezzanine 2  
Downstream Building  
1 London Bridge  
London, SE1 9BG  
Tel: 0845 458 1489  
Email: [info@byc.org.uk](mailto:info@byc.org.uk)  
[www.byc.org.uk](http://www.byc.org.uk)

### **The Centre for Research into the Older Workforce**

NIACE  
21 De Montfort Street  
Leicester, LE1 7GE  
Email: [stephen.mcnair@niace.org.uk](mailto:stephen.mcnair@niace.org.uk)  
[www.olderworkforce.org.uk](http://www.olderworkforce.org.uk)

### **The Employers Forum on Age**

Floor 3, Downstream  
1 London Bridge  
London, SE1 9BG  
Tel: 0845 456 2495  
Email: [efa@efa.org.uk](mailto:efa@efa.org.uk)  
[www.efa.org.uk](http://www.efa.org.uk)

### **London Youth**

47-49 Pitfield Street  
London, N1 6DA  
Tel: 020 7549 8800  
Email: [hello@londonyouth.org.uk](mailto:hello@londonyouth.org.uk)  
[www.londonyouth.org.uk](http://www.londonyouth.org.uk)

### **National Youth Agency**

Eastgate House, 19-23 Humberstone Road  
Leicester, LE5 3GJ  
Tel: 0116 242 7350  
[www.nya.org.uk](http://www.nya.org.uk)

### **v, the National Young Volunteers Service**

5th floor, Dean Bradley House  
52 Horseferry Road  
London SW1P 2AF  
Tel: (+44) 020 7960 7000  
<http://vinspired.com>

### **Resources**

Rochester, C. & Thomas, B (2006) The Indispensable backbone of voluntary action: Measuring and Valuing the Contribution of Older Volunteers  
[www.wrvs.org.uk/vita/home.htm](http://www.wrvs.org.uk/vita/home.htm)

Unell, J (2006) Barrier of opportunity: insurance for older volunteers  
[www.wrvs.org.uk/vita/home.htm](http://www.wrvs.org.uk/vita/home.htm)

Age and the Workplace: Putting the Employment Equality (Age) Regulations 2006 into Practice (ACAS)  
[www.acas.org.uk/media/pdf/d/t/6683\\_Age\\_and\\_the\\_Workplace\\_AWK.pdf](http://www.acas.org.uk/media/pdf/d/t/6683_Age_and_the_Workplace_AWK.pdf)

Managing Age: a Guide to Good Practice Employment (TUC)  
[www.tuc.org.uk/extras/managingage.pdf](http://www.tuc.org.uk/extras/managingage.pdf)

Skills Assessment: a Self Assessment Toolkit for Older Workers (Fair Play for Older Workers: The Age Employment Network)  
[www.taen.org.uk/resources/individuals.htm](http://www.taen.org.uk/resources/individuals.htm)

Mind your language - a guide to getting recruitment right (Employers Forum on Age)  
[www.efa.org.uk/publications/downloads/1825v3\\_EFA\\_AppForm\\_Notes.pdf](http://www.efa.org.uk/publications/downloads/1825v3_EFA_AppForm_Notes.pdf)

## Disability

### Ability Net

AbilityNet Technical Centre  
Suite 1, Malvern Gate  
Bromwich Road  
Worcester, WR2 4BN  
Tel: 0800 269 545  
Courses: 01926 312 847  
enquiries@abilitynet.org.uk  
www.abilitynet.org.uk

### Beating Eating Disorders

103 Prince of Wales Road  
Norwich NR1 1DW  
Tel: 0870 770 3256  
www.b-eat.co.uk

### Blind in Business

1 London Wall Buildings  
London, EC2M 5PG  
Tel: 0207 588 1885  
Email: info@blindinbusiness.org.uk  
www.blindinbusiness.org.uk

### Cancer Research UK

P.O. Box 123  
Lincoln's Inn Fields  
London WC2A 3PX  
Tel: 020 7242 0200  
www.cancerresearchuk.org

### Deaf Aware

Consultancy offering advice and support  
on accessibility and deaf awareness  
training.  
Orchard Court  
Boughton  
Chester Cheshire, CH3 5EW  
Tel: 0773 244 1383  
Email: deafaware@lycos.co.uk  
www.deafaware.com

### Depression Alliance

212 Spitfire Studios  
63 - 71 Collier Street  
London N1 9BE  
Tel: 0845 123 23 20  
Email: information@depressionalliance.org  
www.depressionalliance.org

### Disability Alliance UK

Universal House  
88-94 Wentworth Street  
London, E1 7SA  
Tel: (Voice and Minicom) 020 7247 8776  
www.disabilityalliance.org

### Disability Law Service

39-45 Cavell Street  
London, E1 2BP  
Tel: 0207 791 9800  
Minicom: 0207 791 9801  
Email: advine@dls.org.uk  
www.dls.org.uk

### Employer's Forum on Disability

Nutmeg House  
60 Gainsford Street  
London, SE1 2NY  
Tel: 0207 403 3020  
Email: website.enquiries@employers-  
forum.co.uk  
www.employers-forum.co.uk

### Mencap

123 Golden Lane  
London, EC1Y 0RT  
Tel: 020 7454 0454  
Email: information@mencap.org.uk  
www.mencap.org.uk

### **Mental Health Foundation**

9th Floor  
Sea Containers House  
20 Upper Ground  
London, SE1 9QB  
Tel: 0207 803 1101  
Email: [mhf@mhf.org.uk](mailto:mhf@mhf.org.uk)  
[www.mhf.org.uk](http://www.mhf.org.uk)

### **MIND**

Granta House  
15-19 Broadway  
London, E15 5BQ  
Tel: 0208 519 2122  
Email: [info@mind.org.uk](mailto:info@mind.org.uk)  
[www.mind.org.uk](http://www.mind.org.uk)

### **MS Society**

MS National Centre  
372 Edgware Road  
London, NW2 6ND  
Tel: 020 8438 0700  
[www.mssociety.org.uk](http://www.mssociety.org.uk)

### **NAZ Project London**

Palingswick House  
241 King Street  
London, W6 9LP  
Tel: 020 8741 1879  
Email: [npl@naz.org.uk](mailto:npl@naz.org.uk)  
[www.naz.org.uk](http://www.naz.org.uk)

### **People First (self advocacy)**

Hampton House, 4th Floor  
20 Albert Embankment  
London, SE1 7TJ  
Tel: 020 7820 6655  
Email: [general@peoplefirstltd.com](mailto:general@peoplefirstltd.com)  
[www.peoplefirstltd.com](http://www.peoplefirstltd.com)

### **RADAR**

12 City Forum  
250 City Road  
London, EC1V 8AF  
Tel: 020 7250 3222  
Minicom: 020 7250 4119  
Email: [radar@radar.org.uk](mailto:radar@radar.org.uk)  
[www.radar.org.uk](http://www.radar.org.uk)

### **Regard**

London, WC1N 3XX  
Fax: 08444 431277  
Email: [secretary@regard.org.uk](mailto:secretary@regard.org.uk)  
[www.regard.org.uk](http://www.regard.org.uk)

### **Rethink**

Head Office, 5th Floor  
Royal London House  
22-25 Finsbury Square  
London, EC2A 1DX  
Tel: 0845 456 0455  
Email: [info@rethink.org.uk](mailto:info@rethink.org.uk)  
[www.rethink.org](http://www.rethink.org)

### **Royal National Institute for the Blind**

105 Judd Street  
London, WC1H 9NE  
Tel: 020 7388 1266  
Helpline: 0845 766 9999  
[www.rnib.org.uk](http://www.rnib.org.uk)

### **Royal National Institute for the Deaf**

19-23 Featherstone Street  
London, EC1Y 8SL  
Tel: 0808 808 0123 (freephone)  
Textphone: 0808 808 9000 (freephone)  
SMS: 0780 000 0360  
Email: [informationline@rnid.org.uk](mailto:informationline@rnid.org.uk)  
[www.rnid.org.uk](http://www.rnid.org.uk)

## Sense

11-13 Clifton Terrace  
Finsbury Park  
London, N4 3SR  
Tel: 0845 127 0060  
Text: 0845 127 0062  
E-mail: [info@sense.org.uk](mailto:info@sense.org.uk)  
[www.sense.org.uk](http://www.sense.org.uk)

## Terrence Higgins Trust

314-320 Gray's Inn Road  
London, WC1X 8DP  
Telephone: 020 7812 1600  
Email: [info@tht.org.uk](mailto:info@tht.org.uk)  
[www.tht.org.uk](http://www.tht.org.uk)

## Young Minds

48-50 St John's Street  
London, EC1M 4DG  
Tel: 0207 336 8445  
[www.youngminds.org.uk](http://www.youngminds.org.uk)

## Resources

Disability, Health and Employment: A short guide for small and medium sized employers (Disability Rights Commission)

[www.equalityhumanrights.com/Documents/Disability/Employment/Disability%20health%20and%20employment%20A%20short%20guide%20for%20small%20and%20medium%20sized%20employers.doc](http://www.equalityhumanrights.com/Documents/Disability/Employment/Disability%20health%20and%20employment%20A%20short%20guide%20for%20small%20and%20medium%20sized%20employers.doc)

iDET - Interactive Disability Equality Training Toolkit (Scope)  
[www.scope.org.uk/work/det/idet/index.shtml](http://www.scope.org.uk/work/det/idet/index.shtml)

See it Right: Making information accessible for people with sight problems (RNIB)  
[www.rnib.org.uk/xpedio/groups/public/documents/PublicWebsite/public\\_seeitright.hcsp](http://www.rnib.org.uk/xpedio/groups/public/documents/PublicWebsite/public_seeitright.hcsp)

Doing Work Differently (Radar)

[www.radar.org.uk](http://www.radar.org.uk)

Employing people with mental health problems - directory of specialist agencies (MIND)

[www.mind.org.uk/Information/Factsheets/Employment+and+benefits/Employing+People+With+Mental+Health+Problems.htm](http://www.mind.org.uk/Information/Factsheets/Employment+and+benefits/Employing+People+With+Mental+Health+Problems.htm)

Realising people's potential (MIND)

[www.mind.org.uk/Information/Booklets/Other/Realising+peoples+potential.htm](http://www.mind.org.uk/Information/Booklets/Other/Realising+peoples+potential.htm)

Making it Work for Employers (Mencap)

[www.mencap.org.uk/download/MIW\\_EMP.pdf](http://www.mencap.org.uk/download/MIW_EMP.pdf)

## Race

### Asylum Aid

Club Union House  
253 – 254 Upper Street  
London, N1 1RY  
Tel: 0207 354 9631  
Email: [info@asylumaid.org.uk](mailto:info@asylumaid.org.uk)  
[www.asylumaid.org.uk](http://www.asylumaid.org.uk)

### Black and Equality Merseyside Network

Toxteth TV  
37 - 45 Windsor Street, Toxteth  
Liverpool L8 1XE  
Tel: 0151 709 5294  
[www.bemnetwork.org.uk](http://www.bemnetwork.org.uk)

### Black Neighbourhood Renewal and Regeneration Network

18A Victoria Park Square  
London, E2 9PB  
Tel: 020 89813003  
[www.bnrrn.org.uk/](http://www.bnrrn.org.uk/)

### **Chinese in Britain Forum**

**enquiries@cibf.co.uk**  
**www.cibf.co.uk**

### **The Consortium of Bengali Associations**

100 Gatesden, Argyle Street  
London WC1H 8EB  
Tel: 020 7713 8610  
Email: **enquiries@cba-uk.org.uk**  
**www.cba.dsl.pipex.com**

### **The Council of Ethnic Minority Voluntary Sector Organisations (CEMVO)**

Boardman House, 64 Broadway  
Stratford, London  
E15 1NG  
Tel: 020 8432 0200  
**www.cemvo.org.uk**

### **DayMer (Turkish/Kurdish Community Centre)**

Tel: (44) 20 7275 8440  
**www.daymer.org**

### **Federation of Irish Societies**

95 White Lion Street  
London N1 9PF  
Tel: 020 7833 1226  
**www.irishsocieties.org**

### **Immigration Advisory Service**

3rd Floor, County House  
190 Great Dover Street  
London, SE1 4YB  
Tel: 0207 967 1200  
**www.iasuk.org**

### **Race on the Agenda (ROTA)**

Unit 101, Cremer Business Centre  
37 Cremer Street  
London E2 8HD  
Tel: 020 7729 1310  
Email: **rota@rota.org.uk**  
**www.rota.org.uk**

### **Refugee Action**

The Old Fire Station  
150 Waterloo Road  
London, SE1 8SB  
Tel: 0207 654 7750  
Email: **info@refugee-action.org.uk**  
**www.refugee-action.org.uk**

### **The Refugee and Asylum Seeking Children's Project**

Children's Legal Centre, University of Essex  
Wivenhoe Park  
Colchester, CO4 3SQ  
Tel: 01206 872 466  
**www.childrenslegalcentre.com**

### **Refugee Council**

240-250 Ferndale Road  
London, SW9 8BB  
Tel: 0207 346 6700  
**www.refugeecouncil.org.uk**

### **The Somali Network**

**www.sonuk.org**

### **Southall Black Sisters**

21 Avenue Road, Southall  
Middlesex UB1 3BL  
Tel: 020 8571 9595  
Email: **info@southallblacksisters.co.uk**  
**www.southallblacksisters.org.uk**

## Traveller Law Reform Project

c/o London Gypsy and Traveller Unit  
6 Westgate Street  
London, E8 3RN  
Tel: 07956 450916  
[www.travellerslaw.org.uk](http://www.travellerslaw.org.uk)

## Voice for Change England

c/o BTEG  
2nd Floor, Lancaster House  
31-33 Islington High Street  
London, N1 9LH  
Tel: 0207 843 6130  
[www.voice4change-england.co.uk](http://www.voice4change-england.co.uk)

## Resources

Equality Review Team (2007) Fairness and Freedom: the Final Report of the Equalities Review (London)  
<http://archive.cabinetoffice.gov.uk/equalitiesreview/>

Bridge the Gap: What is known about the BME Third Sector in England (Voice for Change England)  
[www.voice4change-england.co.uk/docs/V4CE\\_Bridge\\_the\\_Gap\\_What\\_is\\_known\\_about\\_the\\_BME\\_Third\\_Sector\\_in\\_England\\_October2007.pdf](http://www.voice4change-england.co.uk/docs/V4CE_Bridge_the_Gap_What_is_known_about_the_BME_Third_Sector_in_England_October2007.pdf)

Commission for Racial Equality (2003) Race Equality and Procurement in Local Government: a guide to local authorities and contractors  
[www.equalityhumanrights.com/Documents/Race/Public%20sector/The%20duty%20to%20promote%20race%20equality%20and%20procurement%20in%20local%20government.pdf](http://www.equalityhumanrights.com/Documents/Race/Public%20sector/The%20duty%20to%20promote%20race%20equality%20and%20procurement%20in%20local%20government.pdf)

## Religion and Belief

### The British Humanist Association

1 Gower Street  
London, WC1E 6HD  
Tel: 020 7079 3580  
Email: [info@humanism.org.uk](mailto:info@humanism.org.uk)  
[www.humanism.org.uk](http://www.humanism.org.uk)

### The Employers Forum for Religion and Belief

Floor 3, Downstream,  
1 London Bridge,  
London,  
SE1 9BG  
Tel: 0845 456 2495  
Email: [efa@efa.org.uk](mailto:efa@efa.org.uk)  
[www.efbelief.org.uk](http://www.efbelief.org.uk)

### Faith Regen Foundation

No 4 Gateway Mews  
Ringway, Bounds Green  
London N11 2UT  
Tel: 0208 2119430  
Email: [info@faithregenuk.org](mailto:info@faithregenuk.org)  
[www.faithregenuk.org](http://www.faithregenuk.org)

### The Inter Faith Network for the UK

8A Lower Grosvenor Place  
London, SW1W 0EN  
Tel: 0207 931 7766  
Email: [ifnet@interfaith.org.uk](mailto:ifnet@interfaith.org.uk)  
[www.interfaith.org.uk](http://www.interfaith.org.uk)

### The National Secular Society

25 Red Lion Square  
London, WC1R 4RL  
Tel: 020 7404 3126  
Email: [enquiries@secularism.org.uk](mailto:enquiries@secularism.org.uk)  
[www.secularism.org.uk](http://www.secularism.org.uk)

## Resources

Challenge and Opportunity: Changing the Pattern of Interfaith Engagement in the UK (Interfaith Network)

**[www.interfaith.org.uk/publications/challenge2006meeting.pdf](http://www.interfaith.org.uk/publications/challenge2006meeting.pdf)**

Religion or Belief in the Workplace: a Guide for Employer and Employees (ACAS)

**[www.acas.org.uk/media/pdf/f/l/religion\\_1.pdf](http://www.acas.org.uk/media/pdf/f/l/religion_1.pdf)**

A Guide to Diversity in the UK (Diversity Solutions)

**[www.diversity-solutions.com](http://www.diversity-solutions.com)**

Good Practice Guide Engaging and Empowering Faith Communities in Housing and Regeneration (Faith Regen Foundation)

**[www.faithregenuk.org/gpg.html](http://www.faithregenuk.org/gpg.html)**

Building Good Relations with People of Different Faiths and Beliefs (Inter Faith Network)

**[www.interfaith.org.uk/publications/buildinggoodrelations.pdf](http://www.interfaith.org.uk/publications/buildinggoodrelations.pdf)**

Interfaith Organisations in the UK a Directory (Inter Faith Network)

**[www.interfaith.org.uk/orderdirectory.htm](http://www.interfaith.org.uk/orderdirectory.htm)**

## Volunteers

### Volunteering England

Regents Wharf  
8 All Saints Street  
London, N1 9RL

Tel: 0845 305 6979

Email: **[volunteering@](mailto:volunteering@volunteeringengland.org.uk)**

**[volunteeringengland.org.uk](http://volunteeringengland.org.uk)**

**[www.volunteeringengland.org.uk](http://www.volunteeringengland.org.uk)**

## Goldstar

**[www.goldstar.org.uk](http://www.goldstar.org.uk)**

## Resources

Investing in Volunteers Toolkit (Volunteering England)

**<http://iiv.investinginvolunteers.org.uk/newsviews/liVToolkit/>**

The A-Z on Volunteering and Asylum (Volunteering England)

**[www.volunteering.org.uk/Resources/publications](http://www.volunteering.org.uk/Resources/publications)**

You cannot be serious! A guide to involving volunteers with mental health problems (Volunteering England)

**[www.volunteering.org.uk/Resources/publications](http://www.volunteering.org.uk/Resources/publications)**

My Time, My Community, Myself

(experiences of volunteering within the black community - Volunteering England)

**[www.volunteering.org.uk/Resources/publications](http://www.volunteering.org.uk/Resources/publications)**

## Other resources and signposts

Plain English Campaign

Advice and free guides on how to communicate as clearly as possible.

**[www.plainenglish.co.uk/guides.htm](http://www.plainenglish.co.uk/guides.htm)**

Information Alternatives

A guide to producing accessible information

**[www.informationalternatives.co.uk/](http://www.informationalternatives.co.uk/)**

Council for Advancement of Communication with Deaf People (CACDP) offers information on training for communication between hearing and deaf people

**[www.cacdp.org.uk/index.html](http://www.cacdp.org.uk/index.html)**

Association for Sign Language Interpreters

The professional association and support network for Sign Language interpreters in England, Wales and Northern Ireland. They include those who work as interpreters and Deaf and hearing people who support their aims

**[www.asli.org.uk/](http://www.asli.org.uk/)**

Sense

Information and services for deafblind people

**[www.sense.org.uk/](http://www.sense.org.uk/)**

EasyInfo

This website offers advice on making information easy to understand for people with learning difficulties

**<http://easyinfo.org.uk/index.jsp>**

GLA Equalities Toolkit September 2002

**[www.london.gov.uk/gla/publications/equalities/equalities\\_toolkit.pdf](http://www.london.gov.uk/gla/publications/equalities/equalities_toolkit.pdf)**

University College London also has very clear explanation of equality legislation

**[www.ucl.ac.uk/hr/equalities/legislation.php](http://www.ucl.ac.uk/hr/equalities/legislation.php)**

## 7. Appendices

### Appendix A – Generic equalities monitoring form sample

The following form is a sample equalities monitoring form that may be used by any organisation. It is designed to be one page that is printed on both sides. It includes all the equality strands and also can be adapted to include optional categories. Users of the form should edit the introduction to reflect their specific circumstances and values and add their contact details at the end.

## Equality and Diversity Monitoring

The Organisation Name aims to provide equal opportunities and fair treatment for all staff/volunteers/service users. Please complete the form and email or post to the address at the end. The information below is anonymous and will not be stored with any identifying information about you. All details are held in accordance with the Data Protection Act 1998. We would like you to complete this form in order to help us understand who we are reaching and to better serve everyone in our community. The information will be used to provide an overall profile analysis of our staff/volunteer/service user base. If you would like the form in an alternative format or would like help in completing the form, please contact a member of staff.

### Race/Ethnicity

Please state what you consider your ethnic origin to be. Ethnicity is distinct from nationality and the categories below are based on the 2001 Census in alphabetical order.

<p><b>Asian</b></p> <p><input type="checkbox"/> Indian</p> <p><input type="checkbox"/> Pakistani</p> <p><input type="checkbox"/> Bangladeshi</p> <p><input type="checkbox"/> Any other Asian background (please write in)</p>	<p><b>Black</b></p> <p><input type="checkbox"/> Caribbean</p> <p><input type="checkbox"/> African</p> <p><input type="checkbox"/> Any other Black background (please write in)</p>	<p><b>Chinese or other ethnic group</b></p> <p><input type="checkbox"/> Chinese</p> <p><input type="checkbox"/> Any other ethnic group (please write in)</p>
<p><b>Mixed race</b></p> <p><input type="checkbox"/> White and Black Caribbean</p> <p><input type="checkbox"/> White and Black African</p> <p><input type="checkbox"/> White and Asian</p> <p><input type="checkbox"/> Any other mixed background (please write in)</p>	<p><b>White</b></p> <p><input type="checkbox"/> English</p> <p><input type="checkbox"/> Scottish</p> <p><input type="checkbox"/> Welsh</p> <p><input type="checkbox"/> Irish</p> <p><input type="checkbox"/> Any other white background (please write in)</p>	<p><input type="checkbox"/> Rather not say</p>

**Age (or date of birth):** \_\_\_\_\_

Rather not say

## Disability

The Disability Discrimination Act 1995 (DDA) defines a person as disabled if they have a physical or mental impairment which has a substantial and long term (i.e. has lasted or is expected to last at least 12 months) adverse effect on one's ability to carry out normal day-to-day activities. This definition includes conditions such as HIV, mental illness and learning disabilities. Do you consider yourself to have a disability according to the above definition?

Yes       No       Rather not say

(If yes, please feel free to say more about the nature and extent of your disability)

## Gender

<input type="checkbox"/> Male	<input type="checkbox"/> Female	Is your gender identity the same as the gender you were assigned at birth? <input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Rather not say		

## Belief or Religion

Which group below do you most identify with?

<input type="checkbox"/> No Religion	<input type="checkbox"/> Baha'i	<input type="checkbox"/> Buddhist
<input type="checkbox"/> Christian	<input type="checkbox"/> Hindu	<input type="checkbox"/> Humanist
<input type="checkbox"/> Jain	<input type="checkbox"/> Jewish	<input type="checkbox"/> Muslim
<input type="checkbox"/> Sikh	<input type="checkbox"/> Other (please write in)	<input type="checkbox"/> Rather not say

## Sexual Orientation

How would you describe your sexual identity?

<input type="checkbox"/> Bisexual	<input type="checkbox"/> Gay man	<input type="checkbox"/> Heterosexual or 'straight'
<input type="checkbox"/> Lesbian	<input type="checkbox"/> Other	<input type="checkbox"/> Rather not say

## Today's date:

Thank you for completing this form. Please send the completed form to: (include email address and postal address)

## Appendix B – Recruitment monitoring form sample

### EQUAL OPPORTUNITIES MONITORING FORM

PRIVATE AND CONFIDENTIAL

As part of [Organisation X's] commitment to Equal Opportunities, we need to collect the following information from all applicants so that we can assess whether we are reaching all sections of the community with our recruitment advertising and review it accordingly.

**All information will be treated in the strictest confidence. Please do not feel that you have to complete all parts of this form if you are not comfortable in doing so.**

This form will be separated from the application form on receipt and numbered along with the application form. The two will not be cross-referenced again apart from after an individual has been appointed to the post, and only for the purposes of recording equal opportunities statistics. Only the person assigned to collating this information will view the two forms together.

#### Race/Ethnicity

Please state what you consider your ethnic origin to be. Ethnicity is distinct from nationality and the categories below are based on the 2001 Census in alphabetical order.

<p><b>Asian</b></p> <p><input type="checkbox"/> Indian</p> <p><input type="checkbox"/> Pakistani</p> <p><input type="checkbox"/> Bangladeshi</p> <p><input type="checkbox"/> Any other Asian background (please write in)</p>	<p><b>Black</b></p> <p><input type="checkbox"/> Caribbean</p> <p><input type="checkbox"/> African</p> <p><input type="checkbox"/> Any other Black background (please write in)</p>	<p><b>Chinese or other ethnic group</b></p> <p><input type="checkbox"/> Chinese</p> <p><input type="checkbox"/> Any other ethnic group (please write in)</p>
<p><b>Mixed race</b></p> <p><input type="checkbox"/> White and Black Caribbean</p> <p><input type="checkbox"/> White and Black African</p> <p><input type="checkbox"/> White and Asian</p> <p><input type="checkbox"/> Any other mixed background (please write in)</p>	<p><b>White</b></p> <p><input type="checkbox"/> English</p> <p><input type="checkbox"/> Scottish</p> <p><input type="checkbox"/> Welsh</p> <p><input type="checkbox"/> Irish</p> <p><input type="checkbox"/> Any other white background (please write in)</p>	<p><input type="checkbox"/> Rather not say</p>

**Age (or date of birth):** \_\_\_\_\_

Rather not say

## Disability

The Disability Discrimination Act 1995 (DDA) defines a person as disabled if they have a physical or mental impairment which has a substantial and long term (i.e. has lasted or is expected to last at least 12 months) adverse effect on one's ability to carry out normal day-to-day activities. This definition includes conditions such as HIV, mental illness and learning disabilities. Do you consider yourself to have a disability according to the above definition?

Yes       No       Rather not say

(If yes, please feel free to say more about the nature and extent of your disability)

## Gender

<input type="checkbox"/> Male	<input type="checkbox"/> Female	Is your gender identity the same as the gender you were assigned at birth?
<input type="checkbox"/> Rather not say		

## Belief or Religion

Which group below do you most identify with?

<input type="checkbox"/> No Religion	<input type="checkbox"/> Baha'i	<input type="checkbox"/> Buddhist
<input type="checkbox"/> Christian	<input type="checkbox"/> Hindu	<input type="checkbox"/> Humanist
<input type="checkbox"/> Jain	<input type="checkbox"/> Jewish	<input type="checkbox"/> Muslim
<input type="checkbox"/> Sikh	<input type="checkbox"/> Other (please write in)	<input type="checkbox"/> Rather not say

## Sexual Orientation

How would you describe your sexual identity?

<input type="checkbox"/> Bisexual	<input type="checkbox"/> Gay man	<input type="checkbox"/> Heterosexual or 'straight'
<input type="checkbox"/> Lesbian	<input type="checkbox"/> Other	<input type="checkbox"/> Rather not say

## Appendix C – Organisational health check

Name:						
Checklist item	Yes	In progress	No	Evidence	Comments	
<b>Basic Info</b>						
Areas of service provision						
Target groups						
Years in operation						
Quality marks						
Scope					Local, Regional, National	
<b>Governance</b>						
Does the organisation have a governing document?						
Is the organisation a registered charity?				CC number		
Is the organisation a company limited by guarantee?				CH number		
Are there job descriptions for the governing body?						
Is there a current Annual Report?						
Is there an induction process in place for the governing body?						
Has the Governing body completed a Conflict of Interest Register?						
Has the governing body completed a skills audit?						
Is there a written mission, vision, aims or objectives and when was it last reviewed?						
Has the organisation created a strategic plan or developed any other planning documents?						

<b>Checklist item</b>	<b>Yes</b>	<b>In progress</b>	<b>No</b>	<b>Evidence</b>	<b>Comments</b>
Does the composition of the governing body reflect the diversity of the community it serves?					
Are any service users on the governing body?					
Finance & Income Generation					
Are there financial procedures in place?					
Are financial records computerised?					
Is there a current set of accounts?					
Does the organisation have a budget?					
Are there separate budgets for each project or programme?					
Are there PAYE records for all paid staff?					
Is there a fundraising strategy in place?					
How many separate streams of funding is the organisation currently in receipt of and what are the timeframes?					
Are quarterly management accounts prepared for the governing body?					
Has the organisation ever been in receipt of a grant, SLA or contract to provide services from a public sector body?					
<b>Management</b>					
Does each paid worker have a written contract and terms of employment?					
Does each paid post have a job description?					

Checklist item	Yes	In progress	No	Evidence	Comments
Is there a volunteer coordinator?					
Is there a volunteer policy or manual?					
Is there a data protection policy in place?					
Is there a staff manual or policy handbook?					This should include policies covering grievance and disciplinary procedures, leave, working hours and retirement.
Is there a complaints procedure?					
Is there a conflict of interest register for staff?					
Is there a child protection/vulnerable adults policy?					
Are there work plans and timelines for current projects, programmes or service provision areas?					
Do work plans identify key milestones?					
Has the organisation completed any project or organisation evaluation?					
Are records kept for service user numbers and demographics? If so, how and where is the information stored?					
Does the organisation keep casefiles and if so, are they ever audited?					
Is any evidence regularly collected regarding outputs and outcomes achieved?					
Is there a mechanism for user feedback?					

<b>Checklist item</b>	<b>Yes</b>	<b>In progress</b>	<b>No</b>	<b>Evidence</b>	<b>Comments</b>
Are service users involved in planning and improving services?					
Are there evaluations of service delivery?					
Does the organisation do a risk assessment of the space it uses for its work? And if so, how often?					
Is there a risk management strategy? If so, when was it last reviewed and who is responsible for implementing it?					
Is there an ICT system in place?					
Does the organisation have a website?					
<b>Contracting and Tendering</b>					
Is there a point person on staff responsible for negotiating contracts?					
Are you confident that the organisation can demonstrate effectiveness in service delivery?					
<b>Equalities</b>					
Is there an equalities monitoring system in place?					Who is included, where is the data stored and how is it used?
Is there an equal opportunities policy and code of practice?					
Is there a person or group responsible for equalities implementation or an equalities officer?					

<b>Checklist item</b>	<b>Yes</b>	<b>In progress</b>	<b>No</b>	<b>Evidence</b>	<b>Comments</b>
Are the resources, services and premises of the organisation accessible to disabled people?					
Is there a disability access document?					
Are there equalities monitoring forms?					Is there one generic form or many?
Have any surveys been done to assess the diversity of staff, volunteers, trustees or service users?					Where are the results and how were they used?
Do managers have the skills and knowledge to implement and provide leadership on equalities policies?					
Are there training opportunities available to ensure that all stakeholders are aware of their rights and responsibilities in relation to equalities.					
Is specific reference made to equality in your organisation's mission statement/values statement?					
Is your equal opportunities policy statement endorsed at the highest level of the organisation?					
Does your publicity and promotional material (including your annual report) demonstrate positive images of the diversity of your workforce and your membership?					

<b>Checklist item</b>	<b>Yes</b>	<b>In progress</b>	<b>No</b>	<b>Evidence</b>	<b>Comments</b>
Do you take positive steps to engage with organisations that are concerned about the rights of, or services to, groups outside of the mainstream voluntary sector?					
Is the equalities statement well publicised and made available to new staff and volunteers?					
When were the equalities policies last reviewed?				Date of last review and who reviewed by	
<b>Health &amp; Safety</b>					
Is there a health & safety policy?					
Is there a designated health & safety officer and if so, have they been trained?					
Does the office equipment meet health & safety requirements?					
<b>Added Value</b>					
Does the organisation have any partnership agreements in place?					
Is there a system in place to give and receive referrals for clients to/from other organisations?					
Does the organisation offer any services or resources in community languages?					
Has the organisation undertaken any research?					
Has the organisation done an environmental impact assessment?					
Please describe any environmentally friendly measures in place.					

## Appendix D – Monitoring checklist

NAME:	Employees	Governing body	Volunteers	Members	Service users	Partners	Other stakeholders
Consultations							
EIAs							
Equality Audits							
Evaluations							
Focus groups							
Funder reports							
Internal records							
Interviews							
Monitoring forms							
Surveys							
Other							

## Appendix E – Equality audit checklist

Name:																				
Checklist item	All strands	Gender	Race	Sexual Orientation	Disability	Age	Religion	Other												
<b>Access</b>																				
Is any of the following monitoring carried out?																				
Recruitment procedures																				
Volunteer monitoring																				
Governing body monitoring																				
Membership																				
Service users																				
<b>Governance</b>																				
Do the governing documents mention equalities?																				
Does the mission statement or values mention equalities?																				
Does the Annual Report reflect diversity?																				
Does the strategic plan or business plan mention equalities?																				
<b>Management</b>																				
Does the staff handbook mention equalities?																				
Do workplans or project plans mention equalities?																				

Checklist item	All strands	Gender	Race	Sexual Orientation	Disability	Age	Religion	Other
Does the website reflect equalities and diversity?								
Do other publications reflect equalities and diversity?								
<i>Do the following policies and procedures mention equality groups:</i>								
Equal opportunities								
Recruitment procedures								
Parental leave								
Disability access								
Health & Safety								
<b>Projects</b>								
Please list any current projects and if they target or reach particular groups:								
<b>Services</b>								
Please list current services and if they target or serve particular groups:								

## Appendix F – Action Plan

Recommendation	Key activity	Progress milestones	Person Responsible	Progress

## Appendix G – Equality Act 2010 update

The Equality Act 2010 was passed into law on 8 April 2010 to bring previous equality and anti-discrimination legislation together and to give equal protection to the different equality groups. The Act replaces the nine large equality laws and over 100 regulations that existed.

The Equality Act uses the term “protected characteristics” in place of “grounds” and includes protection for nine protected characteristics. These are age, disability, gender reassignment (with a wider definition than previously), marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.

Highlights of the new legislation include the following:

### Public Sector Equality Duty

The new Public Sector Equality Duty, which is due to come into force in April 2011, replaces the three existing duties (relating to race, gender, disability) with a single duty covering the eight protected characteristics of age, disability, gender reassignment, pregnancy and maternity, race, religion or belief, sex and sexual orientation. The existing separate disability, gender and race equality duties remain in force until the new single duty begins.

The duty applies to those public authorities listed in Schedule 19 of the Act in carrying out all of their functions. It also applies to other bodies, including voluntary sector organisations that carry out public functions. Their duty is to have due regard to the need to:

- » eliminate discrimination, harassment and victimisation
- » advance equality of opportunity between people who share a protected characteristic and those who do not share it
- » foster good relations between persons who share a protected characteristic and those who do not share it

The emphasis in the specific duties is likely to be on outcomes rather than process. However, whatever the specific duties may require, the primary obligation is to meet the general duty (public sector equality duty) in the Act itself.

### Protection against discrimination

For most of the nine protected characteristics the Act prohibits direct discrimination, indirect discrimination, combined discrimination, harassment and victimisation. For disability the Act also prohibits discrimination arising from disability and failure to make reasonable adjustments.

Although not written into the text of the Act, the government has made clear that protection against direct discrimination or harassment based on a particular protected characteristic, applies not only to a person who shares that characteristic but also to a person who is perceived wrongly to share it and to anyone who is associated with it, such as a non-disabled carer of a disabled person.

The Act now makes it possible to claim discrimination because of the combination of two protected characteristics.

The new protection against age discrimination in areas other than employment and higher education, will apply only to ages 18 and above. This will not come into effect before 2012 and might be begun in stages.

The Act also creates separate protection against discrimination for a woman because of pregnancy and maternity.

### **Positive action**

The Act enables public, voluntary and private sector employers and providers of services, such as public authorities, to take steps to help particular groups overcome disadvantage, meet needs that are different from the needs of other groups or increase participation. Therefore the Act makes it lawful to take positive action measures that involve different treatment of different equality groups which would otherwise be unlawful. However, for positive action measures to be considered to be lawful three conditions must be satisfied:

- a) the employer or service provider must reasonably think that the group in question suffers a disadvantage, has different needs, or has disproportionately low level of participation
- b) the employer or service provider takes action with the aim of enabling or encouraging the group to overcome or minimise their disadvantage, meeting their needs, or enabling or encouraging participation, and
- c) the action is a proportionate means of achieving that aim - that is, that the action is both appropriate and necessary to achieve the aim.

### **Employment**

The Act makes it unlawful for an employer to ask job applicants questions about disability or health before making a job offer except in specified circumstances.

In terms of equal pay between men and women, public sector employers must now report on the median pay of women and men in their employ. Private and voluntary sector employers are encouraged to do so voluntarily (and may, in 2013, have a statutory duty to do so). Employment tribunals, if they uphold a complaint of discrimination, will now be able to make a recommendation that the employer take certain action to avoid future breaches of the Act that would benefit not only the complainant but the workforce as a whole.

The main provisions of the Act will come into force in October 2010. The public sector equality duty, the socio-economic duty and dual discrimination protection will come into force in April 2011. There will be consultations this year on the secondary legislation that will be needed to implement some of the Act, including specific duties within the public sector equality duty. The Charity Commission and EHRC plan to publish guidance for organisations related to the new law over the summer of 2010.

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