Making Inclusion a Reality

CII

Keywords

What is equality?
Equality means "the same as each other"
– i.e. everyone is equal.

What is diversity?
Diversity means difference
– i.e. different protected characteristics and
different ways of thinking being represented.

What is inclusion?
Inclusion is when everyone is included,
irrespective of their diversity.

What is inclusive leadership?
Inclusive leadership is when leaders behave
in a way that makes their teams feel included,
irrespective of their background.

Contents

The Chartered Insurance Institute (CII) Professionalism in practice

As the premier professional body for the insurance and financial planning professions, the CII promotes higher standards of integrity, technical competence and business capability.

With over 120,000 members in more than 150 countries, the CII is the world's largest professional body dedicated to these sectors.

Success in CII qualifications is universally recognised as evidence of knowledge and understanding. Membership of the CII signals a desire to develop broad professional capability and subscribe to the standards associated with professional status.

The CII works with businesses to develop bespoke, company-wide solutions that ensure competitive advantage by enhancing employees' technical and professional competence.

Individually, CII's members are able to drive their personal development and maintain their professional standing through an unrivalled range of learning services and by adhering to the CII's Code of Ethics.

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Introduction

The central purpose of the CII is to build trust in insurance. Success depends upon our being relevant, modern and diverse – both in how we work and how the profession works.

We should all be familiar with the concept of equality and its benefits. Practitioners who embrace diversity do so, not just because it is the right thing to do, but because of the positive impact on our businesses, the sector as a whole and society in general. Drawing on a broad spectrum of views and experiences supports decision making and those professions committed to fairness do well in terms of recruitment and retention.

Equality and diversity should not be seen as a compliance exercise, mere box ticking. It should be second nature. Making it so is not difficult and we are here to help you make it happen.

Sian Fisher
Chief Executive Officer

As the professional standards body for insurance it is our role to work with you to develop the profession, to meet the needs of today's consumers and businesses and those of the future.

The business case for diversity and inclusion is clear to us all. Business leaders are putting more focus on diversity and inclusion now that tangible benefits are more quantifiable. In a recent study by PwC, 79% of international business leaders agreed that enhanced customer satisfaction was a core outcome from a diverse and inclusive workforce, with 85% believing it enhanced business performance[1], and yet we have a way to go in our profession in utilising the diverse thinking and creativity that is out there.
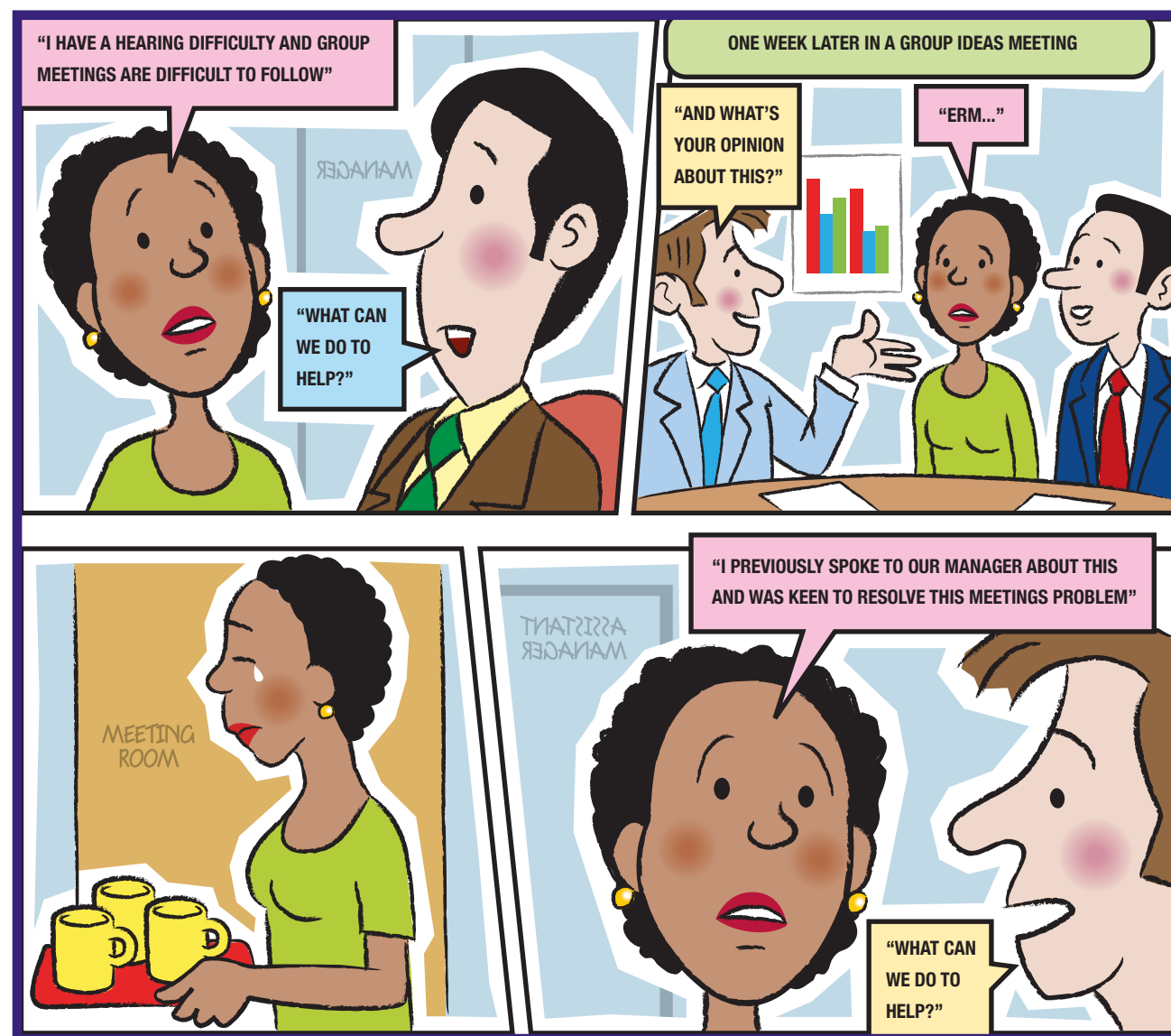
There are many ways we can all make a difference as we continue to embrace diversity and value inclusion. I hope you find this booklet a useful source of inspiration to make a difference.

Tali Shlomo
People Engagement Director

> " Big things have small beginnings
>
> **Prometheus**

People with disabilities

A disability is a health condition that has a substantial and long term (12 months+) impact on an individual's ability to undertake every day activities. This can refer to an individual's functioning, including physical, sensory, cognitive and intellectual impairments, and mental illness.

"I HAVE A HEARING DIFFICULTY AND GROUP MEETINGS ARE DIFFICULT TO FOLLOW"

MANAGER

"WHAT CAN WE DO TO HELP?"

ONE WEEK LATER IN A GROUP IDEAS MEETING

"AND WHAT'S YOUR OPINION ABOUT THIS?"

"ERM..."

MEETING ROOM

ASSISTANT MANAGER

"I PREVIOUSLY SPOKE TO OUR MANAGER ABOUT THIS AND WAS KEEN TO RESOLVE THIS MEETINGS PROBLEM"

"WHAT CAN WE DO TO HELP?"

Is it easy to see someone's disability? Will it always be visible?

Learning statement/outcome:

Identify barriers that people with disabilities face and how good practice can make a positive difference. Seek consent to share a disclosure of a disability and any resulting arrangements that may be agreed to assist a person with a disability.

The distribution of people with disabilities is fairly evenly spread across the UK. The North East, Wales, the North West and East Midlands have the highest rates of disability, while London, the South East and the East of England have the lowest.[2]

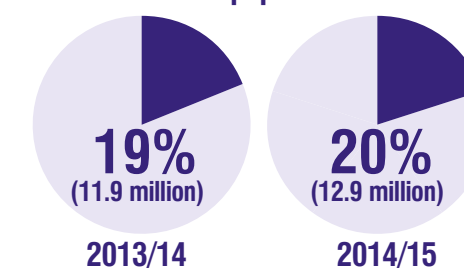**People with disabilities in and out of work**

For Jul–Sep 2016 (the most recent quarter for which data is available at time of publication) amongst people in Great Britain aged 16–64...[3]

84.4% of those who stated they **did not have a disability** were economically active. Of these **4.5% were unemployed.**
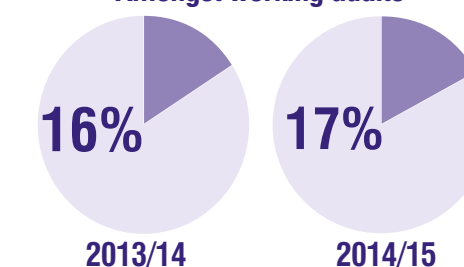
54.1% of those who stated they **had a disability** were economically active. Of these, **10% were unemployed.**

Most commonly reported disabilities[5]

	2012/13	2013/14	2014/15
Mobility	57%	55%	53%
Problems with stamina/breathing/fatigue	28%	28%	29%
Dexterity	38%	38%	39%

The most commonly reported impairments in the three years 2012/13, 2013/14 and 2014/15 related to mobility, dexterity, and stamina/breathing/fatigue.*

Percentage of the UK population experiencing disability[4]

Total population

19% (11.9 million) — 2013/14

20% (12.9 million) — 2014/15

Amongst working adults

16% — 2013/14

17% — 2014/15

Those over state pension age
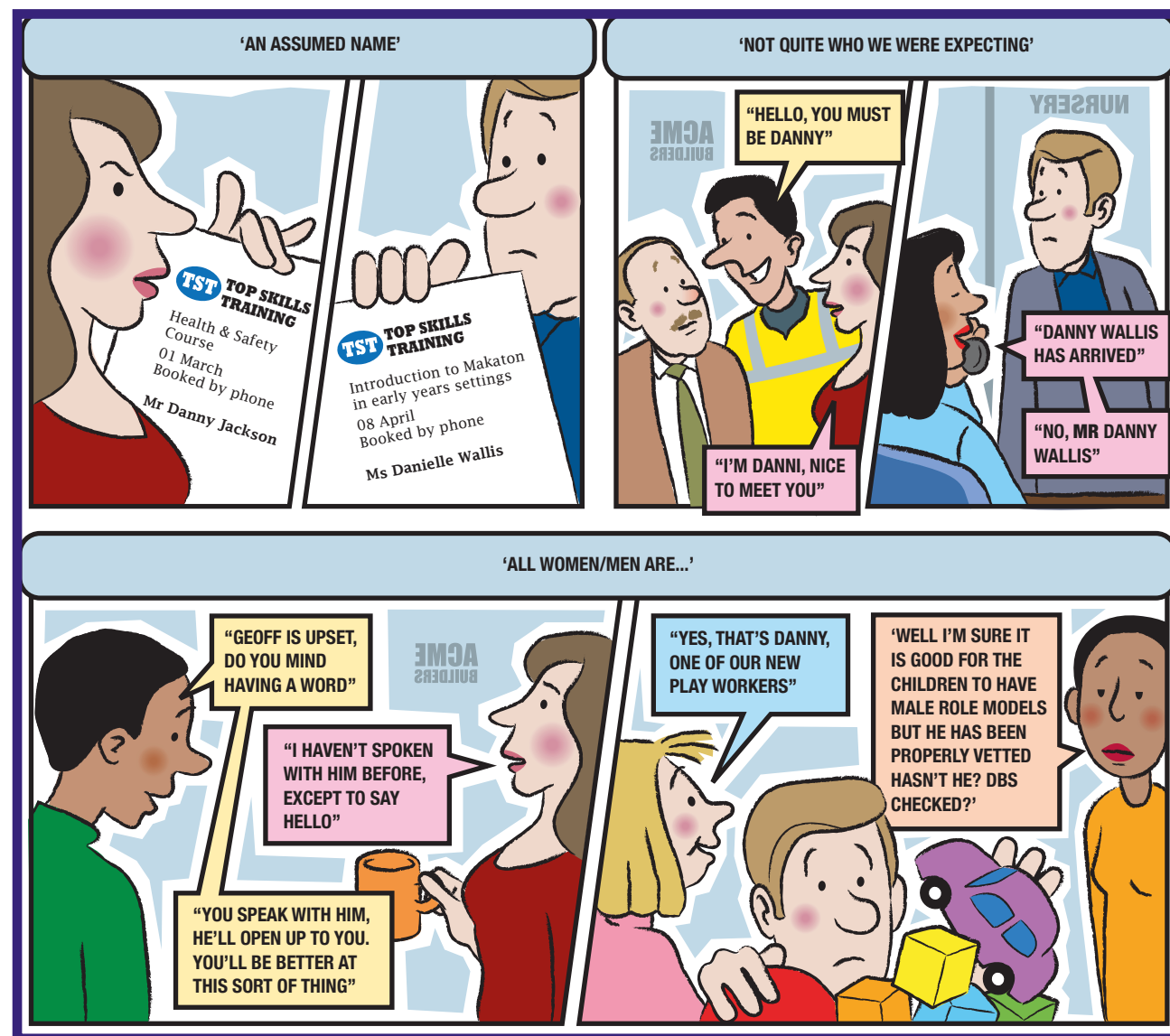
42% — 2013/14

45% — 2014/15

"For every quarter for which comparable data is available (since April 2013), the unemployment rate amongst economically active people with disabilities has been at least 5.5% higher than that among those without disabilities.[6]

*Some people will experience and report more than one type of impairment.

Gender

Unconscious bias refers to a form of bias that happens outside of our control, triggered by our brain making quick judgments and assessments of people and situations. Unconscious bias is primarily influenced by our background, cultural environment and personal experiences. Sometimes we can jump to conclusions, for example, based on whether someone is a man or a woman.

'AN ASSUMED NAME'

TST TOP SKILLS TRAINING
Health & Safety Course
01 March
Booked by phone
Mr Danny Jackson

TST TOP SKILLS TRAINING
Introduction to Makaton in early years settings
08 April
Booked by phone
Ms Danielle Wallis

'NOT QUITE WHO WE WERE EXPECTING'

"HELLO, YOU MUST BE DANNY"

"DANNY WALLIS HAS ARRIVED"

"NO, MR DANNY WALLIS"

"I'M DANNI, NICE TO MEET YOU"

'ALL WOMEN/MEN ARE...'

"GEOFF IS UPSET, DO YOU MIND HAVING A WORD"

"I HAVEN'T SPOKEN WITH HIM BEFORE, EXCEPT TO SAY HELLO"

"YOU SPEAK WITH HIM, HE'LL OPEN UP TO YOU. YOU'LL BE BETTER AT THIS SORT OF THING"

"YES, THAT'S DANNY, ONE OF OUR NEW PLAY WORKERS"

"WELL I'M SURE IT IS GOOD FOR THE CHILDREN TO HAVE MALE ROLE MODELS BUT HE HAS BEEN PROPERLY VETTED HASN'T HE? DBS CHECKED?"

How would you feel if someone made an assumption about your gender and it influenced the way they engaged with you?
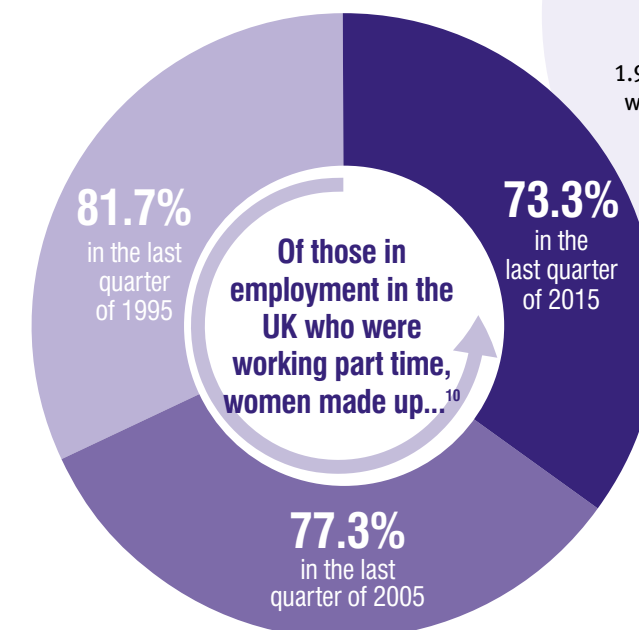
Learning statement/outcome:

Unconscious bias at work can influence decisions in recruitment, promotion, staff development, recognition and our relationships at work which can lead to a less inclusive working environment. It is important that we recognise our own biases and how we can apply them positively to create an inclusive place for all.

Women are under-represented in senior business leadership...

At September 2016, there were **7 female** CEOs, either in post or incoming, leading or set to lead FTSE 100 firms.[9]

...and over-represented in the part time workforce

81.7% in the last quarter of 1995

73.3% in the last quarter of 2015

Of those in employment in the UK who were working part time, women made up...[10]

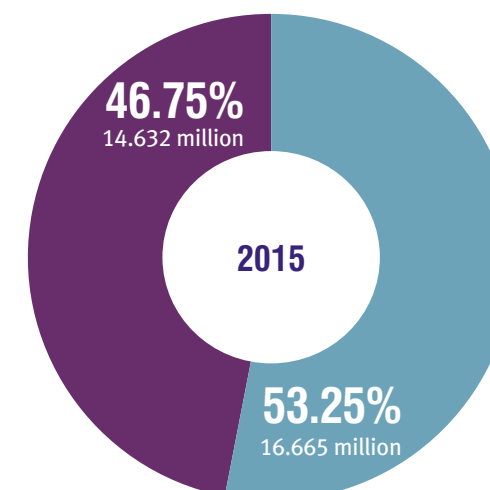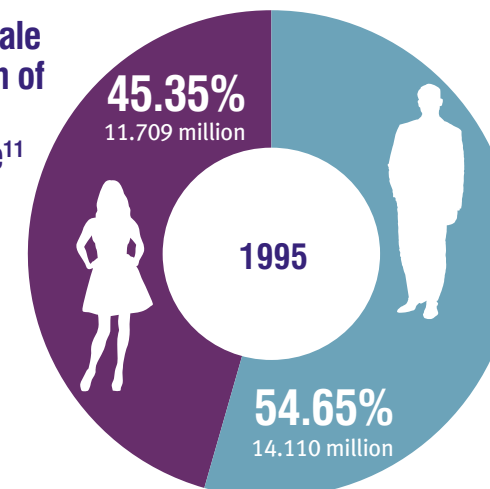77.3% in the last quarter of 2005

Male/female dominated occupations

In the last quarter of 2015:

3.288 million people in employment were classified as managers, directors or senior officials; of these 2.130 million (64.8%) were men and 1.158 million (35.2%) were women.
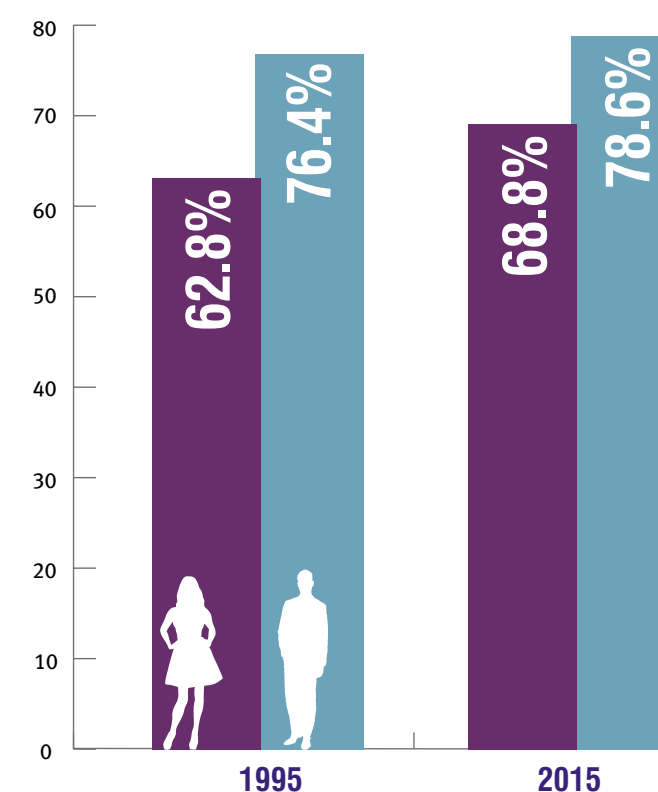
1.976 million process, plant & machine operatives were made up of 1.745 million men (88.3%) and 231,000 women (11.7%).

Of the 2.92 million people working in caring, leisure & other services, 522,000 were men (17.9%) and 2.4 million were women (82.1%).[7,8]

Male/female proportion of the UK workforce[11]

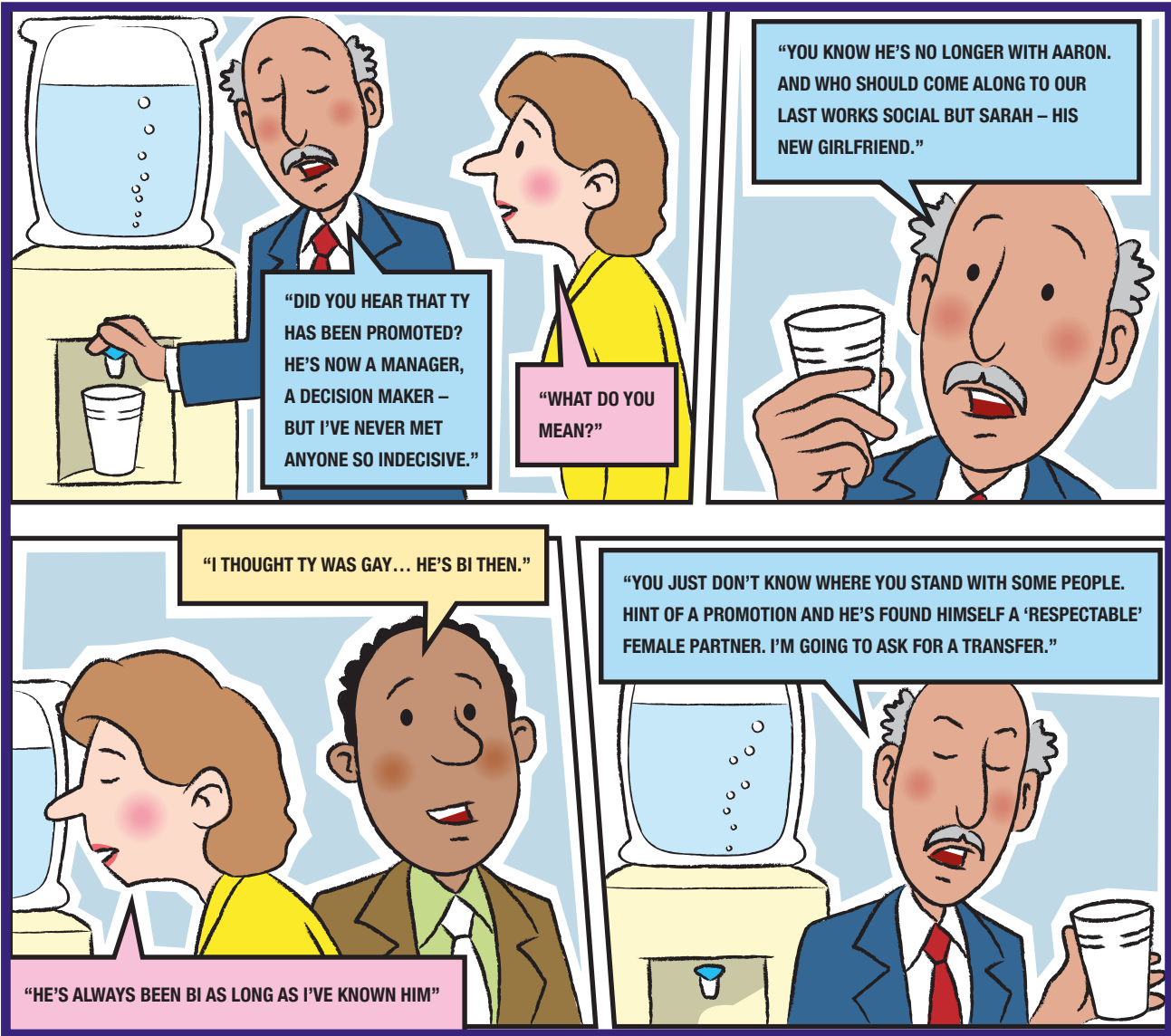45.35% 11.709 million

54.65% 14.110 million

1995

46.75% 14.632 million

53.25% 16.665 million

2015

Average percentage of men and women in the UK aged 16–64 in employment[12]

62.8%
76.4%
68.8%
78.6%

1995   2015

80
70
60
50
40
30
20
10
0

Sexual orientation

Sexual orientation is defined as an often-enduring pattern of emotional, romantic and/or sexual attractions of men to women or women to men (heterosexual), of women to women or men to men (homosexual), or by men or women to both sexes (bisexual). It also refers to an individual's sense of personal and social identity based on those attractions, related behaviours and membership in a community of others who share those attractions and behaviours.

"DID YOU HEAR THAT TY HAS BEEN PROMOTED? HE'S NOW A MANAGER, A DECISION MAKER – BUT I'VE NEVER MET ANYONE SO INDECISIVE."

"WHAT DO YOU MEAN?"

"YOU KNOW HE'S NO LONGER WITH AARON. AND WHO SHOULD COME ALONG TO OUR LAST WORKS SOCIAL BUT SARAH – HIS NEW GIRLFRIEND."

"I THOUGHT TY WAS GAY… HE'S BI THEN."

"YOU JUST DON'T KNOW WHERE YOU STAND WITH SOME PEOPLE. HINT OF A PROMOTION AND HE'S FOUND HIMSELF A 'RESPECTABLE' FEMALE PARTNER. I'M GOING TO ASK FOR A TRANSFER."

"HE'S ALWAYS BEEN BI AS LONG AS I'VE KNOWN HIM"

Should someone's sexual orientation have any bearing on their job or how their colleagues behave towards them?

Learning statement/outcome:

Connect with people within the lesbian, gay or bisexual (LBG) community and recognise them for their contributions to the workplace.

It is hard to determine how many people in the UK or Great Britain identify as lesbian, gay or bisexual (LGB) but by all estimates they remain in the minority. It may be the case that instances of lesbian, gay or bisexual identities are under reported in official statistics.

"Stonewall has estimated that there are 3.7 million gay (LGB) people in Great Britain.[13]

Percentage of UK population aged 16 and over in 2015 identifying as…[14]
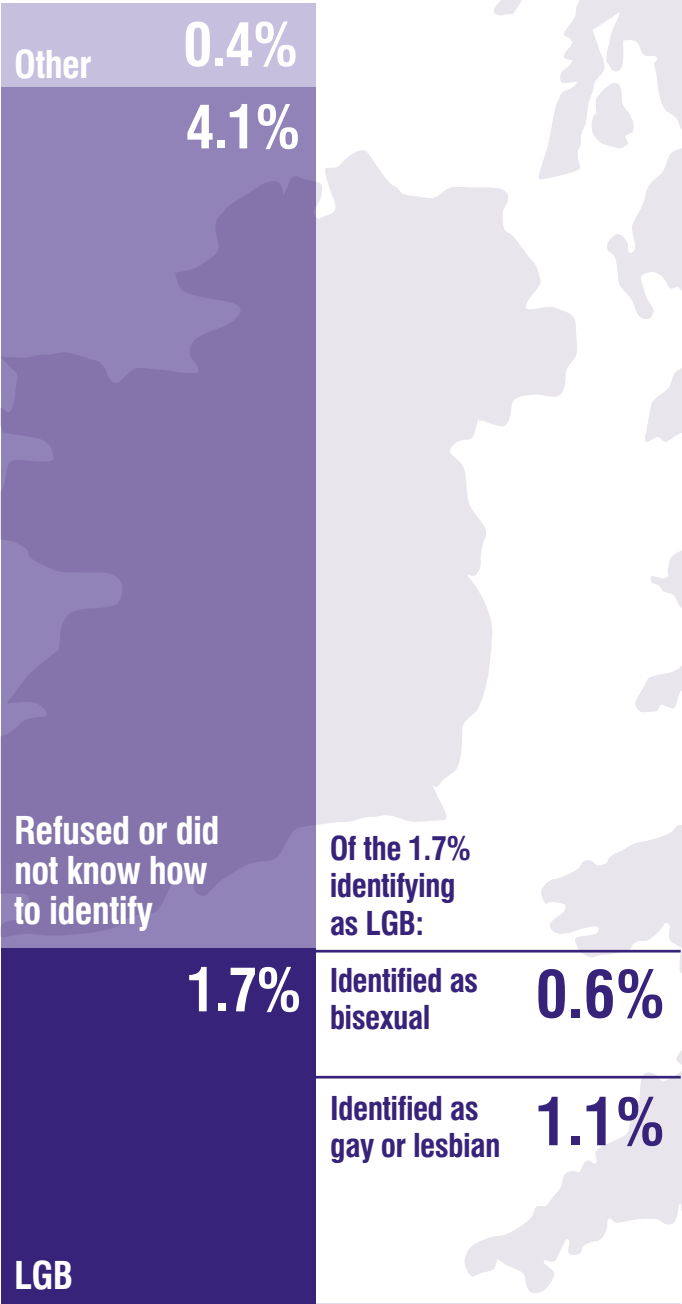
A larger percentage of younger age groups identified as LGB[15]

3.3% Aged 16–24

0.6% Aged 65+

More men identified as gay/lesbian (1.6%) than bisexual.

2% Identified as LGB

1.5% Identified as LGB

More women identified as bisexual (0.8%) than gay/lesbian.

Other	0.4%
	4.1%

Refused or did not know how to identify

Of the 1.7% identifying as LGB:

1.7%

Identified as bisexual	0.6%
Identified as gay or lesbian	1.1%

LGB

"In 2012, a Stonewall survey found that 19% of people in Britain acknowledged they had relatives who are lesbian, gay or bisexual.[16]

Transgender people

Transgender is an umbrella term referring to people whose gender identity differs from the social expectations for the biological sex identified at birth.

CAROLINE IS A TRANSWOMAN WORKING AS A SALES MANAGER

"AS YOU KNOW CAROLINE, CELIA HAS BEEN DOING VERY WELL WITH THE ROGERS ACCOUNT, SO IT SEEMS ONLY RIGHT THAT WE GIVE HER SOME FURTHER CLIENTS, AND THAT'S WHY WE'RE REALLOCATING THE WESTON AND UNIVERSAL ACCOUNT TO HER."

"BUT I'VE SPENT 5 YEARS DEVELOPING THAT ACCOUNT, I'VE GOT A REALLY GOOD RELATIONSHIP WITH THE MANAGERS THERE, I'VE TREBLED INCOME…"

"…AND WE WANT INCOME TO KEEP ON RISING. IT'S TOO HIGH RISK. THAT RELATIONSHIP RUNS ON FACE TO FACE MEETINGS. WHAT WILL THEY THINK."

"SO CELIA WILL BE LOOKING AFTER YOU FROM NOW ON AND I KNOW SHE'LL DO AN EXCELLENT JOB. I'LL MAKE SURE SHE'S FULLY BRIEFED."

"IT JUST SEEMS SUCH A SHAME, YOU KNOW OUR BUSINESS SO WELL."

It can be difficult for people who are not transgender to imagine what being transgender feels like. Imagine what it would be like if the gender that others identified you as was not the one you felt yourself to be?

Learning statement/outcome:

Identify barriers and challenges transgender and gender non-conforming people face and reflect on ways to make them feel welcomed and included.

The terms Transgender, Trans and Gender Variance have broad and shifting definitions. Legal protection is also relatively broad. At the present time there is no one agreed estimate of the total number or likely prevalence of gender variant adults in the UK, however, campaigners suggest this may be around 1%; so far only a small number of people have applied to have a new gender legally recognised.

Someone is not required to undergo gender reassignment surgery in order to be afforded the protection of the Equality Act.[17] For example, someone who is living their life as a person of the opposite sex to that which they were assigned at birth, whether or not undergoing medical treatment, is covered.

'Transgender' is currently used as an inclusive, umbrella term describing all those whose gender expression falls outside the typical gender norms.[18] The term Trans may be used in a similar way. However, terminology in this field continues to evolve rapidly.

Trans advocacy, campaign and research organisation GIRES recommended in 2011, on the basis of the evidence then available, that UK employers should assume…

around **1%** of their adult employees and service users may experience some degree of gender variance

around **0.015%** were likely to have undergone transition (to live full time in the gender role with which they identify).[19]

"Between the 2005–06 and 2014–15 financial years (inclusive) a total of **3,906 full Gender Recognition Certificates (GRCs) were issued** in the UK by the Gender Recognition Panel.[20] A GRC enables the holder to have their new gender legally recognised and to take on the accompanying rights and responsibilities of their acquired gender."

Mental Health

Mental health is the mental and emotional state in which we feel able to cope with the normal stresses of everyday life. Mental ill-health can range from feeling 'a bit down' to common disorders such as anxiety, depression and, in limited cases, to severe mental illnesses such as bipolar disorder or schizophrenia.

What would you do to help a work colleague affected by stress, anxiety or depression? How would you know that they were potentially affected?

Learning statement/outcome:

Take the time to understand how mental health problems affect, and are affected by, work and how we can best support people with mental ill health.

How common are common mental health problems?

In 2014, it was estimated that one adult in six (17.0%) had a 'Common Mental Disorder' (such as depression and generalised anxiety)[21]

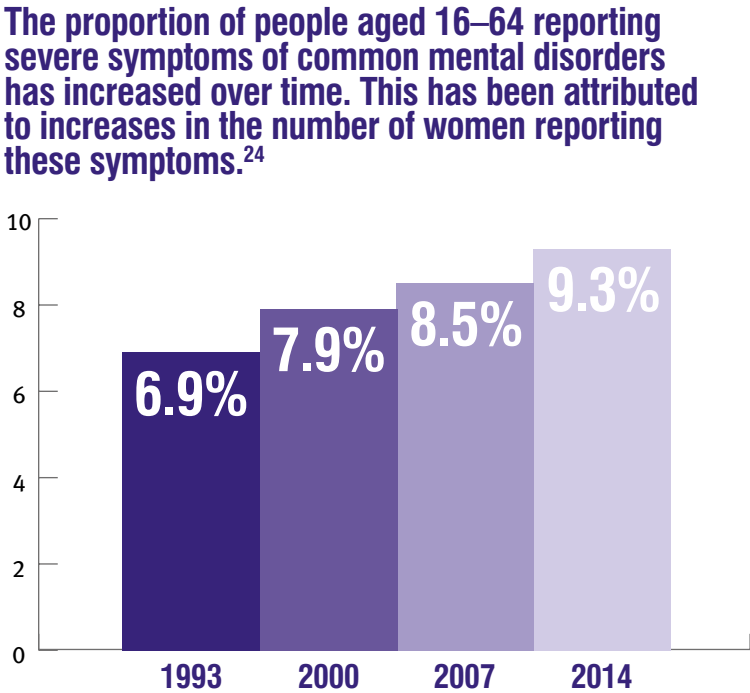
One in five women
20.7%

One in eight men
13.2%

> In 2014, of all men and women aged 16–64, it was women aged 16–24 who were the most likely to report they were experiencing symptoms of a common mental disorder.[22]

In 2013, 6,233 suicides were recorded in the UK for people aged 15 and older.[23]

22% were women

78% were men

The proportion of people aged 16–64 reporting severe symptoms of common mental disorders has increased over time. This has been attributed to increases in the number of women reporting these symptoms.[24]

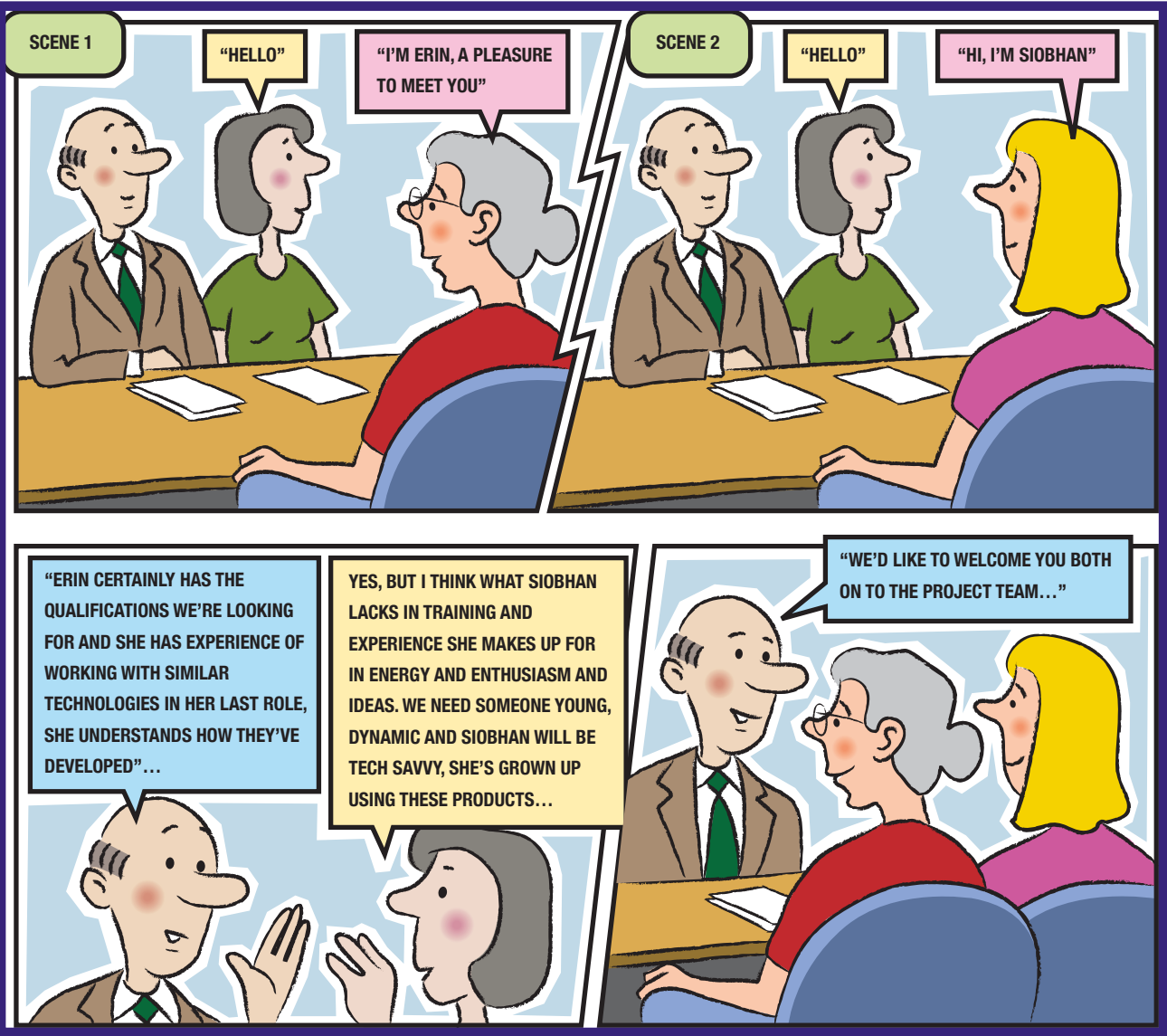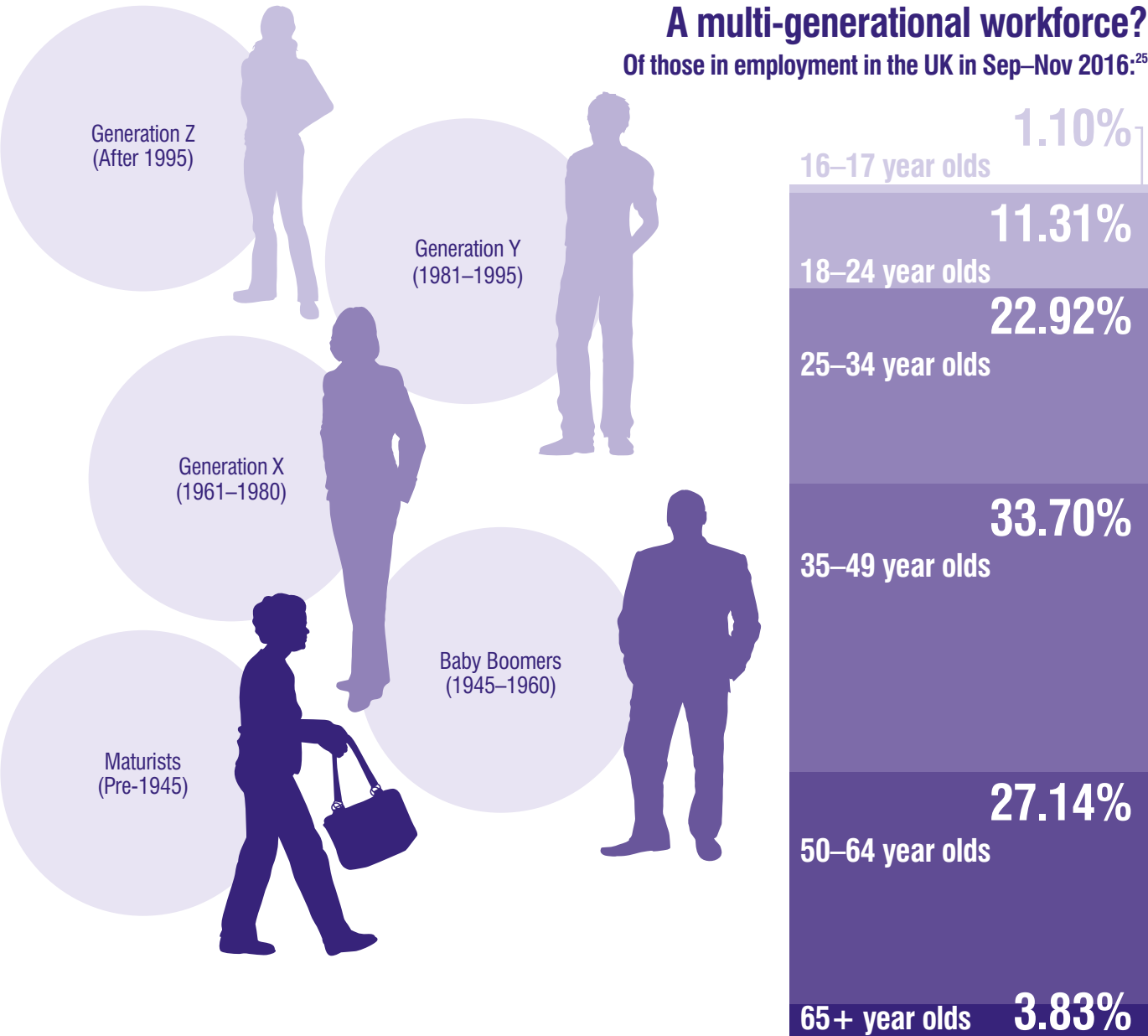| 1993	2000	2007	2014
6.9%	7.9%	8.5%	9.3%

Different generations

Today's workforce is decidedly multi-generational. It is comprised of five generations – Maturists, Baby Boomers, Generation X, Generation Y (or Millennials), and a smattering of Generation Z – whose life experiences have left indelible marks on their values and work preferences.

Imagine if you were overlooked for an opportunity because someone made an assumption about your suitability based purely on when you were born?

Learning statement/outcome:

It's important to understand that generational differences will influence the actual and perceived behaviours of each generational group. Understanding some of the wants and desires of each group, as well as your own unconscious bias, will help you develop strategies to maintain the right balance and the right approach.

Generation Z
(After 1995)

Generation Y
(1981–1995)

Generation X
(1961–1980)

Baby Boomers
(1945–1960)

Maturists
(Pre-1945)

A multi-generational workforce?
Of those in employment in the UK in Sep–Nov 2016:[25]

1.10%
16–17 year olds

11.31%
18–24 year olds

22.92%
25–34 year olds

33.70%
35–49 year olds

27.14%
50–64 year olds

3.83%
65+ year olds

An aging population?

Between mid-2005 and mid-2015 the UK population aged 65 and over increased by 21%, and the population aged 85 and over increased by 31%. The number of males aged 85 and over has increased by 54% since mid-2005, compared to a 21% increase for females.[26]

A snapshot of recent changes

	2005	2015
Median age of UK population[27]	38.7	40.0
Of those in employment in the UK[28, 29, 30]	Approximately 579,000 or 2% were aged 65+.	Approximately 1.18 million or 3.8% were aged 65+.
	Approximately 4.12 million or 14.6% were aged 16–24.	Approximately 3.94 million or 12.6% were aged 16–24.
Percentage of older and younger people in the UK in employment[31, 32]	Approximately 6.3% of those aged 65+.	Approximately 10.5% of those aged 65+.
	Approximately 59.5% of those aged 16–24.	Approximately 54.2% of those aged 16–24.
Percentage of younger people who were in full time education and employment[33]	Approximately 36.8% of those aged 16–24.	Approximately 29.1% of those aged 16–24.
Percentage of younger people who were NEET (not in employment education or training)[34]	13.75% of 16–24 year olds (mean average across the year).	12.25% of 16–24 year olds (mean average across the year).

Carers

A carer is anyone who provides unpaid care, for a friend or family member who, due to illness, disability, mental ill health or an addiction, cannot cope without their support.
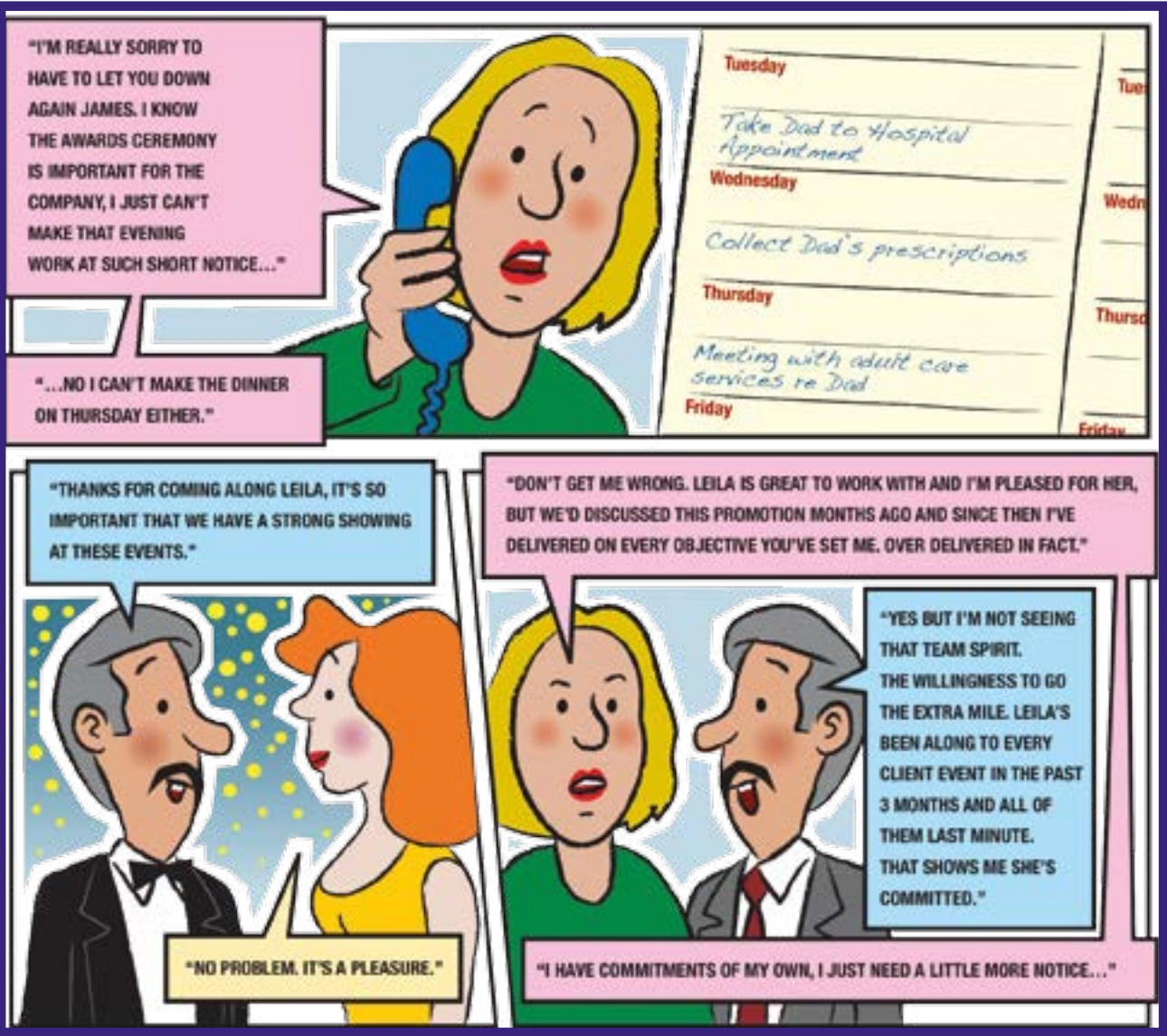
Do you think it would be fair if someone was excluded from an opportunity because they care for an elderly relative outside of their normal working day?

Learning statement/outcome:

Understanding the experiences of carers allows you to appreciate the various skills, qualities, and attributes that carers have and how these can benefit our workplace. An awareness of the factors that may help or hinder carers who are working, and how we can best support them, is also important.
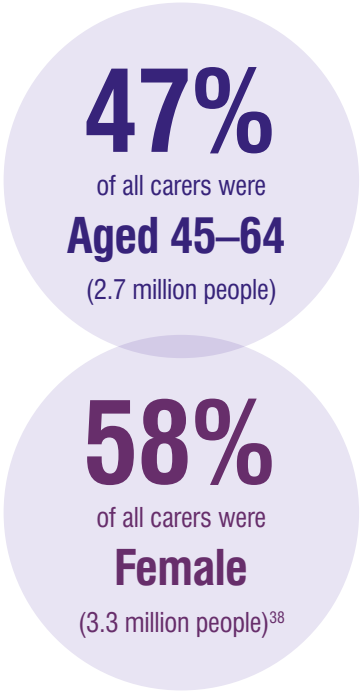
In 2015 there were an estimated 6.5 million carers in the UK.[35]

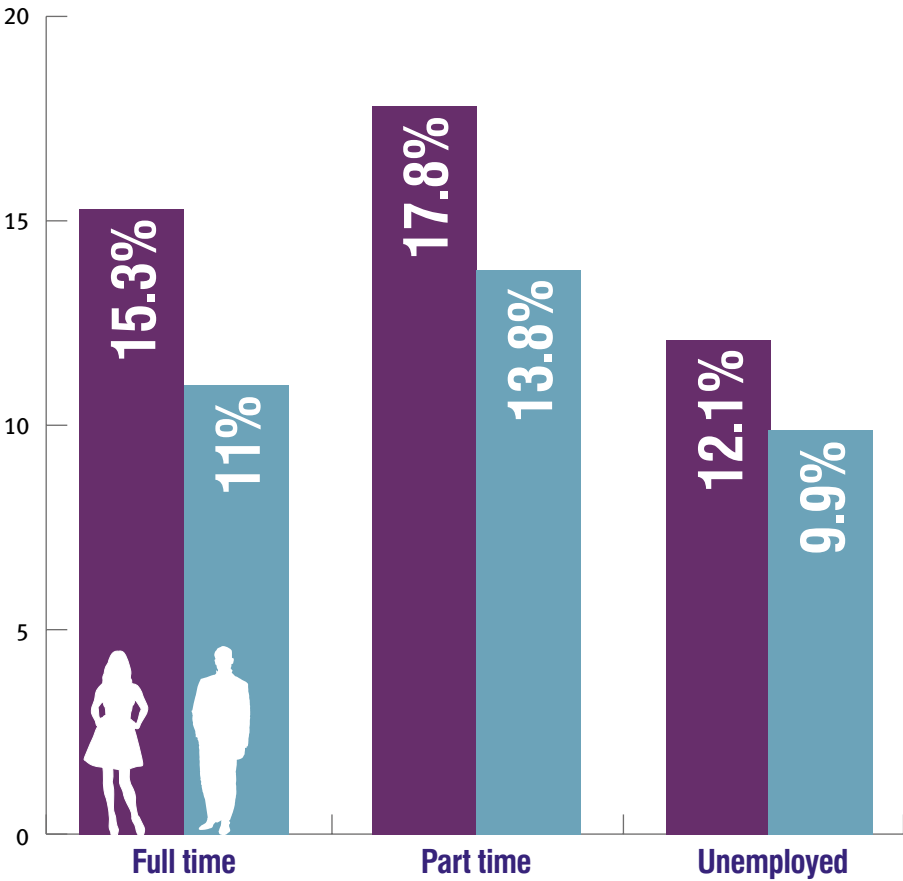The Carers Trust suggests that three in five people in the UK will be carers at some point in their lives.[36]

Who cares?

The 2011 census revealed that in England and Wales:

47%
of all carers were
Aged 45–64
(2.7 million people)

58%
of all carers were
Female
(3.3 million people)[38]

Carers in employment in 2011:[37]

	Full time	Part time	Unemployed
	15.3%	17.8%	12.1%
	11%	13.8%	9.9%

In England and Wales there has been an increase in the percentage of the total population providing care.[39]

2001
11.5% of women
8.8% of men

2011
11.9% of women
9% of men
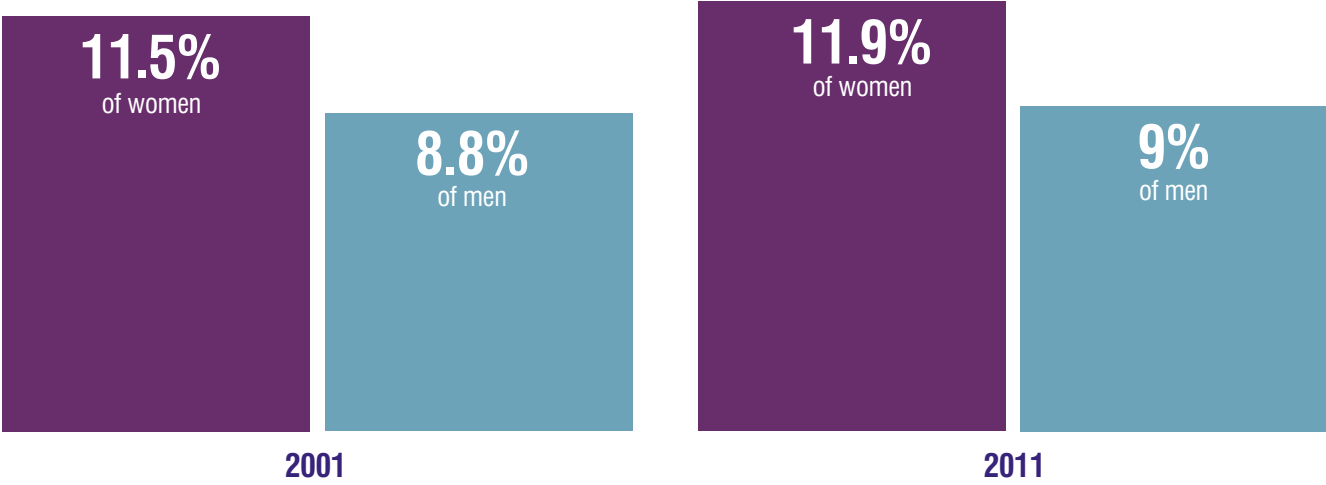
People with minority ethnic backgrounds

Black and Minority Ethnic (BME) or Black, Asian and Minority Ethnic (BAME) is terminology often used to indicate people of non-white descent. However, the UK is home to people from a wide range of ethnic backgrounds, including a number of white minority ethnic groups.

"THE CHINESE CONTINGENT HAS DECLINED. I DON'T UNDERSTAND. I DEMONSTRATED CLEARLY HOW WE HAVE OUTPERFORMED THE COMPETITOR. THEY COMPLIMENTED ME ON MY PRESENTATION. WHEN I ASKED THEM IF THEY WOULD INVEST…WELL, THEY DIDN'T SAY ANYTHING…."

"….BUT THEY WERE VERY POLITE? LET ME HELP YOU NEXT TIME. SUCH A DIRECT APPROACH AND WITH A NEGATIVE FOCUS ON OUR RIVALS WILL NOT WORK."
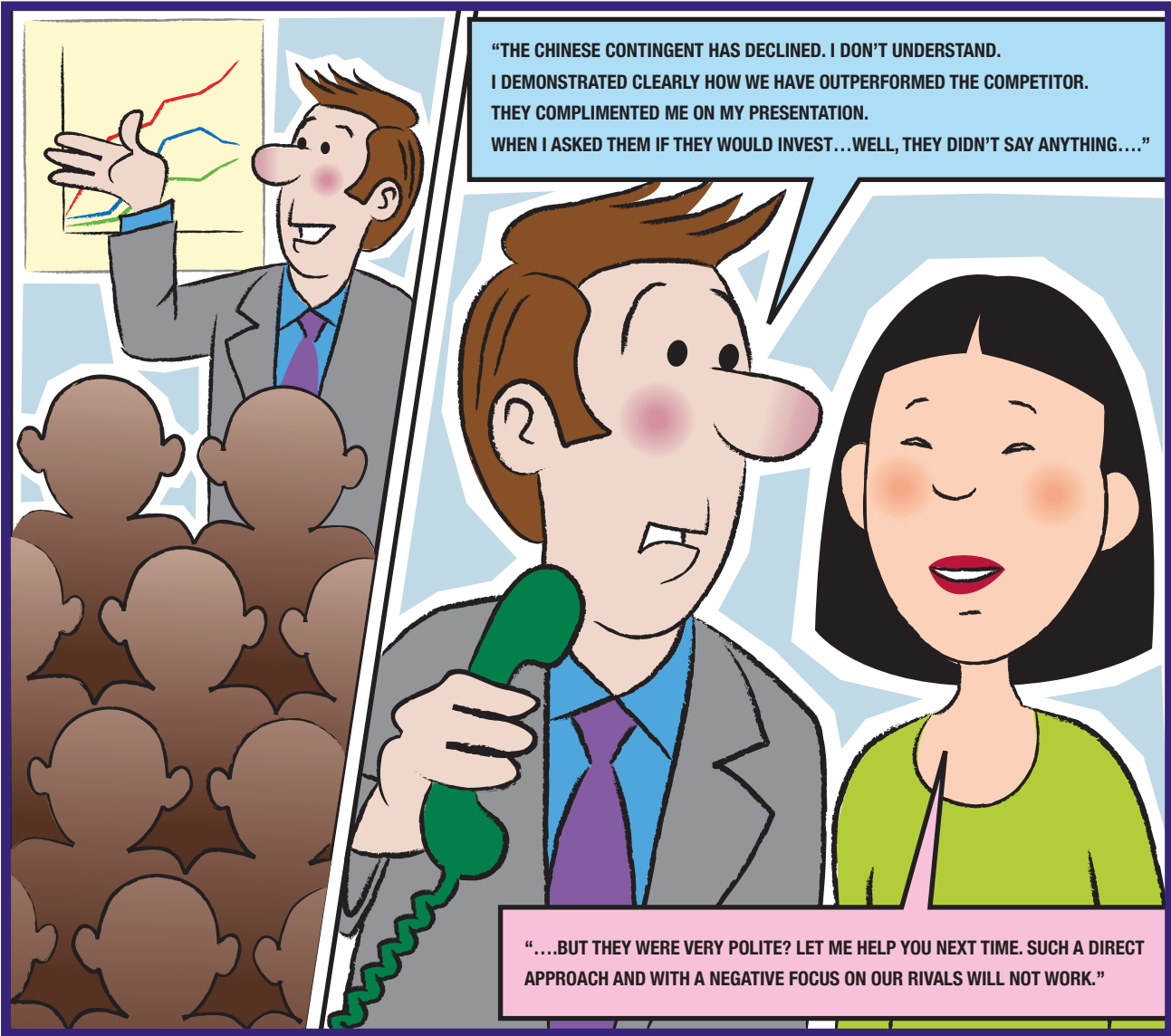
How would you feel if your cultural customs and values were disregarded and ignored?
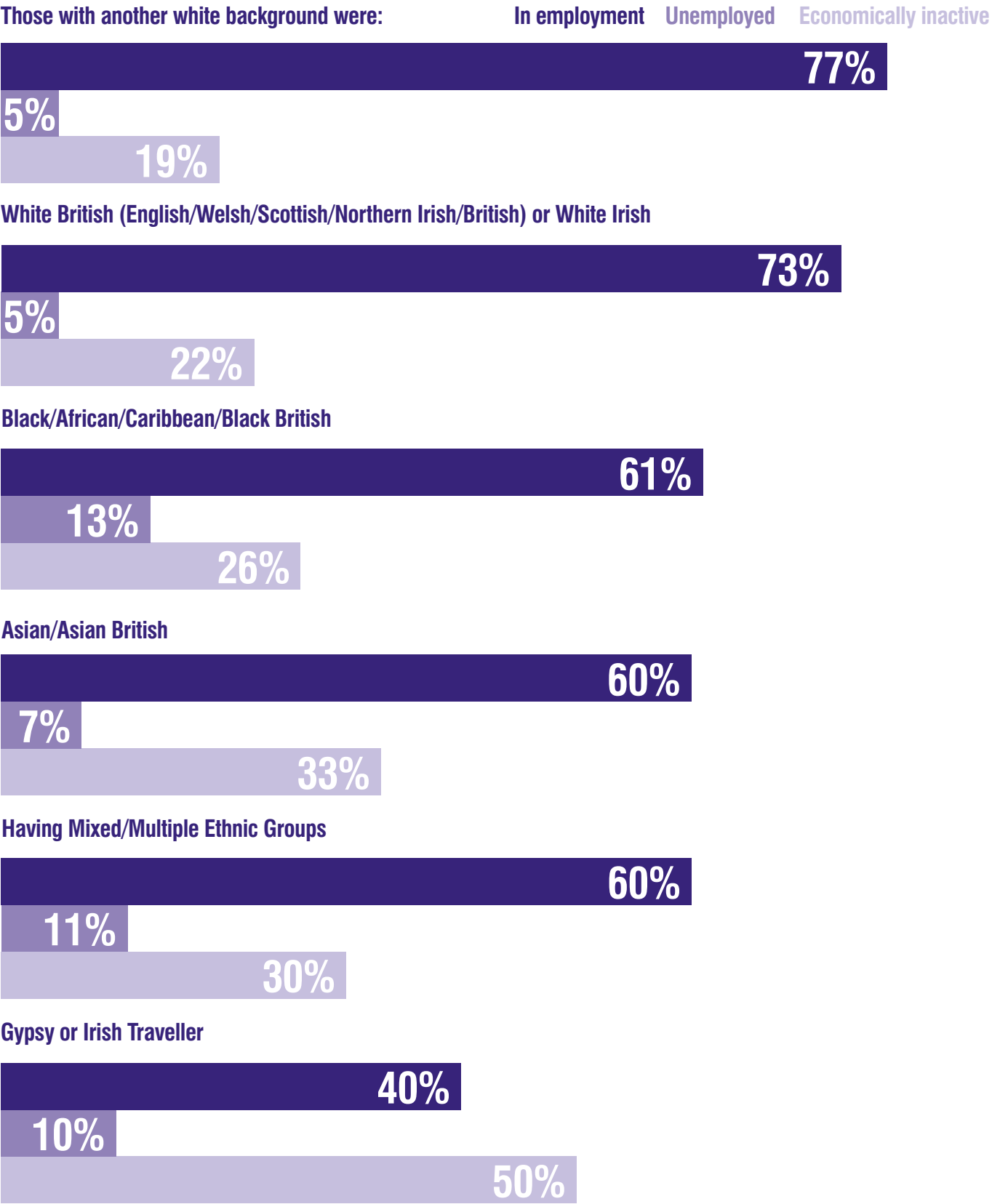
Learning statement/outcome:

People come from a broad range of backgrounds and may have different customs and values. We should be sensitive and respectful towards such differences and understand what constitutes acceptable and unacceptable behaviours and terminology. Certain words have the potential to cause offence, we need to avoid situations where a 'joke' or banter causes offence or upset. From a business perspective, understanding what matters to people outside your own cultural background will help you do business better.

Analysis of the 2011 census has shown that there are notable differences across different ethnic groups in the rates of employment, unemployment and economic inactivity (not working and not actively looking for work).

Employment rates in different ethnic groups[40]

In 2011, amongst those aged 16–64 in England and Wales:

	In employment	Unemployed	Economically inactive
Those with another white background were:	77%	5%	19%
White British (English/Welsh/Scottish/Northern Irish/British) or White Irish	73%	5%	22%
Black/African/Caribbean/Black British	61%	13%	26%
Asian/Asian British	60%	7%	33%
Having Mixed/Multiple Ethnic Groups	60%	11%	30%
Gypsy or Irish Traveller	40%	10%	50%

References

1 PwC, 2015. *Female millennials in financial services: Strategies for a new era of talent* [online] Available at: http://www.pwc.com/gx/en/industries/financial-services/publications/female-millenials.html [accessed 06 January 2017]

2 DWP 2013/14 in Smith, D. (ed.), 2016, *Disability in the United Kingdom 2016: Facts and Figures* [pdf]. Cambridge: Papworth Trust. Available at: http://www.papworthtrust.org.uk/sites/default/files/Disability%20Facts%20and%20Figures%202016.pdf [accessed 10 January 2017]

3 Office for National Statistics (ONS), 2016. *A08: Labour market status of disabled people* [Data Table]. ONS. Available at: https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/datasets/labourmarketstatusofdisabledpeoplea08 [accessed 10 January 2017]

4 Department for Work and Pensions (DWP), 2016. *Family Resources Survey 2014/15* [pdf]. London: DWP. Available at: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/531242/family-resources-survey-2014-15.pdf [accessed 10 January 2017]

5 Department for Work and Pensions (DWP), 2016. *Family Resources Survey 2014/15: Table 4.5: Impairment types reported by disabled people1, 2012/13, 2013/14 and 2014/15, United Kingdom* [Data Table]. London: DWP. Available at: https://www.gov.uk/government/statistics/family-resources-survey-financial-year-201415 [accessed 10 January 2017]

6 Office for National Statistics (ONS), 2016. A08: *Labour market status of disabled people* [Data Table]. ONS. Available at: https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/datasets/labourmarketstatusofdisabledpeoplea08 [accessed 10 January 2017]

7 Office for National Statistics (ONS), 2016. *EMP08: All in employment by occupation* [Data Table]. ONS. Available at: https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/datasets/allinemploymentbyoccupationemp08 [accessed 09 January 2017]

8 Office for National Statistics (ONS), 2016. *SOC2010 volume 1: structure and descriptions of unit groups* [online]. ONS. Available at: https://www.ons.gov.uk/methodology/classificationsandstandards/standardoccupationalclassificationsoc/soc2010/soc2010volume1structureanddescriptionsofunitgroups#major-group-structure-of-the-classification-and-qualifications-skills-training-and-experience [accessed 09 January 2017]

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Further guidance

Equality and diversity guide

Full guide available at: http://www.cii.co.uk/23109

Summary

Benefits

- Promotes and contributes to organisational reputation
- Aids recruitment and retention
- Increases productivity
- Mitigates risk
- Ensures the insurance profession is demonstrating best practice

Step-by-Step

Understand the business and social justice cases for equality and diversity

An effective understanding and management of equality and diversity can benefit firms in a host of different ways.

Understand the protected characteristics and the legal framework

The Equality Act 2010 protects individuals against discrimination because of their protected characteristics (of which there are nine) or other circumstances.

Develop an equality and diversity policy – including staff responsibilities

Developing your policy will help clarify the main issues and priorities for your organisation.

Undertake staff training

Training can take a number of forms and is a clear sign of an employer's commitment to embedding equality and diversity.

Undertake a diversity audit

Diversity audits help to identify the parts of your strategy that work well and those that need to be re-examined.

Keep on top of developments – legislation and best practice changes

Legislation and requirements are subject to change and so it is important to keep abreast of the latest developments.

Flexible working guide

Full guide available at: http://www.cii.co.uk/37497

Flexible working is far from a new phenomenon, though its profile and importance is on the rise. For decades many employers have provided part-time or job share opportunities, though very much set in the traditional '9 to 5' way of working. This has changed significantly over recent years as more flexible working options have emerged.

New legal frameworks, attitudinal change and, above all, technological advancements have contributed to the rise in flexible working across our economy. The vast majority of employers offer some form of flexible arrangements (a survey by the Chartered Institute of Personnel and Development found that only 4% of firms questioned did not offer any type of flexibility). The benefits of a flexible approach to work are well documented and apply to employers, employees and UK plc as a whole.

All employees with 26 weeks of consecutive service are now able to request flexible working. The array of flexible working options can at first appear daunting if you are an employer, as can considering whether you have the capacity to offer flexibility, developing a policy and dealing with requests from employees. This short guide has been developed to help employers understand what flexible working means, the legal framework behind it and the benefits it can bring, as well as tips on developing your own flexible working policy.

All firms are different and what works for one company might not be appropriate for another, therefore this guide provides a high level introduction to the subject and provides a number of options and approaches to consider.

Key points

- Flexible working can benefit a business in a whole host of ways from increasing productivity to improving talent retention.
- It can help promote employee motivation and well being.
- Flexible working helps promote equality and diversity within the workforce.
- There is no one size fits all solution – only you as an employer can decide what will work for you and your employees.

Guidance notes to Equality Impact Assessments (EIA)

Equality is a shorthand term referring to the range of work aimed at ensuring the full and fair participation of marginalised or under-represented groups, where these groups may be excluded from full and fair participation as a result of discrimination and disadvantage, accidental or otherwise. This has a particular reference to the protected characteristics set out in the Equality Act 2010 which are age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion and belief, sex and sexual orientation.

What is EIA?

An Equality Impact Assessment (EIA) is a tool aimed at improving policy development and implementation by ensuring that individuals and teams consider the likely impact of their work on different groups. It involves anticipating the effects of policies, procedures, and functions on different groups and making sure that any negative impacts are eliminated or minimised and opportunities for promoting and advancing equality, diversity and inclusion are maximised.

Why should we complete EIAs?

EIAs, although not a legal requirement, are an extremely useful mechanism for:

- preventing any potential discrimination before it occurs;
- ensuring that everything your organisation does is as inclusive as possible;
- providing a defence if a discrimination claim is made against your organisation.

When should we undertake an EIA?

They should be undertaken when any new activity, new type of event, procedure or policy is planned or when substantial changes are planned to current activities or procedures which could have an effect on stakeholders. The EIA should be undertaken before the new procedure, policy or activity or substantial changes take effect. There should be enough time to carry out any potential changes highlighted in the EIA.

What is a policy?

A policy is any practice, written document, guiding principle or procedure which sets out a course of action which an organisation adopts and implements. This includes any decision-making resulting in a change in practice.

What areas should the EIA cover?

EIAs should cover the nine protected characteristics in the Equality Act 2010.

These are as follows:

- Age
- Disability
- Gender reassignment
- Marriage and civil partnership
- Pregnancy and maternity
- Race
- Religion or belief
- Sex
- Sexual orientation

Northern Ireland has two extra protected characteristics: political opinion and people with dependants.

Completing an EIA – 7 point plan

1. When the need for an EIA has been identified the person responsible for the event, policy or procedure should complete an EIA. Where possible, at least two people, and ideally four to six people, should be involved in EIAs so that the viewpoint of more than one person is obtained. EIAs can be conducted by telephone.

2. The procedure, policy or activity should be considered against each of the Protected Characteristics in turn and any potential problems should be considered and noted. People involved should be prepared to think outside of the box.

3. Where a concern affects more than one or all protected characteristics, it should be noted in all sections to show that it has been reviewed under that particular characteristic.

4. Where possible, remedial actions should be identified. If it is not possible to find a solution to the problem, this should be noted on the EIA along with an explanation as to why it is not feasible.

5. A decision should be made about when the policy or procedure should be reviewed and this should be diarised.

6. The EIA should then be signed off by the relevant person and reviewer and filed.

7. The person responsible for the EIA should ensure all the remedial actions are carried out.

Types of Discrimination

Direct Discrimination

There are three different ways in which direct discrimination can occur. These are where a person is treated less favourably than another person because:

- of a protected characteristic e.g. a person is pregnant
- it is thought that the protected characteristic applies to them even if this is not actually the case (perceptive discrimination) e.g. a person is thought to be gay even though they are heterosexual
- they associate with someone to whom a characteristic applied (associative discrimination) i.e. the person is a carer for someone with a disability.

Indirect Discrimination

This happens where a policy or practice which affects everyone disadvantages a group who share a protected characteristic e.g. a uniform policy requires all female employees to wear a knee length skirt making no provision for those who may wish to cover their legs for reasons of their religion.

Victimisation

Victimisation is where a person is treated unfavourably because they have previously submitted or supported a complaint or raised a grievance related to a protected characteristic or because it is thought that they have done so i.e. a person submits a tribunal claim against a supermarket for discrimination and the supermarket deliberately delays delivering their customer orders as a result of this.

Harassment

Harassment is "unwanted conduct related to a relevant protected characteristic, which has the purpose or effect of violating an individual's dignity or creating an intimidating, hostile, degrading, humiliating or offensive environment for that individual" e.g. touching a man or woman inappropriately.

The Protected Characteristics and issues to consider

Events

Access arrangements cover several protected characteristics. Think carefully about physical access to a venue and about sight lines, AV and acoustics and seating plans for example. It is also advisable to ask delegates to let you know in advance if they have any particular access or dietary requirements. You may wish to make a statement in your invitations or joining instructions to indicate your commitment to making the event open to all and asking that everyone attending do so in accordance with your organisation's equality and diversity policy.

Age

Age covers both younger and older people. Issues which EIAs may need to consider are:

- older people may be less inclined to use technology so may need simpler solutions to be made available
- younger people may have less life experience so may be less aware of certain issues
- age may mean that a person has disabilities but these can be dealt with under the "disability" protected characteristic.

People who care for elderly relatives are also protected under this protected characteristic.

Disability

A disability is a condition which lasts or is likely to last over one year and affects an individual's ability to carry out "day to day" activities. It includes reoccurring conditions and conditions as diverse as cancer, dyslexia, asthma and schizophrenia.

- People with mobility disabilities
- People with manual dexterity or other physical disabilities
- People with hearing impairments
- People with visual impairments
- People who are deaf (British Sign language users)
- People who are blind
- People with learning disabilities or other mental/ cognitive impairments
- People with mental health conditions
- People with a communication difficulty such as Dyslexia
- People with a long-term health condition or illness such as cancer or HIV.

People who care for people with disabilities are also protected under this protected characteristic.

Because disabilities can vary so widely, careful consideration will need to be given to the specifics of each activity subject to an EIA. While care should be taken to remove obvious barriers to participation, it is also important to work with individuals with disabilities or caring for those with disabilities to understand their specific needs.

Gender reassignment

Gender reassignment covers a person who is proposing to undergo, is undergoing or has undergone gender reassignment (the process of changing physiological or other attributes of sex, therefore changing from male to female, or female to male to match the gender identity).

According to advice provided on the Equality and Human Rights Commission website as at May 2014, a person can choose whether they are defined as male or female. Therefore, at the current time, there does not appear to be any requirement to introduce any additional gender definitions to the "male" "female" ones normally used.

Issues which EIAs need to consider:

- Name/gender changes should be dealt with sensitively e.g. name/gender changes whilst booked onto an event
- Surgery may mean that it was not possible for an individual to meet certain requirements.

Marriage and civil partnership

People who are in civil partnerships should be treated the same as those who are married.

Issues which an EIA needs to consider are:

- Referring to partners rather than spouses or husbands and wives
- A person may, or may not, change their surname due to marriage, civil partnership or divorce. Name changes should be dealt with sensitively.

Pregnancy and maternity

Issues which EIAs should be aware of are:

- Arrangements may need to be made for a woman to breast feed during a work meeting e.g. short breaks and a private room can be arranged.

Race

Race includes all races. Race also refers to nationality and can include being English, Scottish, Welsh or Northern Irish.

Issues which EIAs should be aware of:

- English not being an individual's first language – everything should be written in plain English and translation may need to be available on request.

Religion or belief

This protected characteristic includes "no religion" and non-religious beliefs such as anti-fox-hunting, climate change, vegetarianism.

To be considered to be a belief, the belief must be in the public domain and the individual must be able to demonstrate that their belief affects the way they live.

Issues which an EIA should consider are:

- Arrangements to enable people to pray at particular times may need to be made.

Sex

Issues which an EIA may need to consider are:

- Women are generally more likely to have childcare arrangements which may need to be taken into consideration. However this is of equal significance if a man has childcare responsibilities.

Sexual orientation

Issues which an EIA may need to take into consideration are:

- Not holding events at religious venues where the religion concerned does not view some sexual orientations as acceptable.

Northern Ireland – political opinions and dependants

Northern Ireland has two additional protected characteristics. In reality, dependants would be dealt with in England and Wales by using one of the other protected characteristics. Political opinion would need to be considered e.g. in terms of ensuring that an event open to all did not take place solely in an area/venue which was known to have a high number of people with a certain political opinion.

Equality Impact Assessment Form

Project, procedure, practice event or activity:

Purpose of project, practice, event or activity:

Protected characteristic	Any Impact?	Remedial steps	Adjustments completed
Age			Yes ☐ No ☐ Date
Disability			Yes ☐ No ☐ Date
Marriage and civil partnerships			Yes ☐ No ☐ Date
Pregnancy and Maternity			Yes ☐ No ☐ Date
Race			Yes ☐ No ☐ Date
Religion or Belief			Yes ☐ No ☐ Date
Sex			Yes ☐ No ☐ Date
Sexual Orientation			Yes ☐ No ☐ Date
Transgender			Yes ☐ No ☐ Date

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