Checklist for Equality, Diversity and Inclusion

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| CUSTOMER EDI DATAProtected characteristics, socio-economic, careering responsibilities, language or literacy needs (and communication preferences), other support needs | Identify gaps (both in what you collect and what you have recorded) and seek to improve quality and quantity (give examples of how it can help deliver improved services). Use customer feedback to help you make the right ask and explanation.  |  |
| Data comparisons of customer base against staff EDI data, local census data, local social housing data to identify any areas of underrepresentation. |  |
| Use EDI data as lens to examine outcomes for customers (e.g., lettings, evictions, arrears action taken, social priority moves, complaints, ASB) and identify any areas for investigation or improvement. |  |
| Use EDI data with mapping to identify any hotspots where impact is greater than others for particular issues (e.g., damp and mould) |  |
| Review how the data can be best used to tailor services. This can be targeted for individual customers (e.g., more time for customer to answer door or communication preferences such as large print) or used to segment communication and the delivery of services. |  |
| Review the EDI data of your engaged customers compared to total customer base. Set targets if not reflective  |  |
|  | Triangulate data with other sources of insights and feedback (e.g. TSMs, complaints, Customer Scrutiny reports) to give a fuller picture of outcomes and where focus is required |  |
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| TRAINING & DEVELOPMENT | Plan programme of training for staff that will cover the essentials and reflect responsibilities (e.g., Equality Act 2010 responsibilities, reasonable adjustments) plus help create right culture (unconscious bias, gender identity, microaggressions, allyship) |  |
| Plan programme of training for board/committee members targeted at their responsibilities including leadership on organisational culture. |  |
| Offer EDI training and support to engaged customers.  |  |
|  | Review training and development delivered internally and by external providers with an EDI lens (e.g., does your management training include a module on managing diversity) and whether it is proactive in promoting diverse talent |  |
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| RECRUITMENT & RETENTION | Review recruitment policies for staff and board/committee: methods, language and criteria used. |  |
| Review EDI recruitment data in terms of stages of the process (application/interview/offer) to see if there are discrepancies and investigate reasons. |  |
| Set targets for staff and board/committee recruitment (e.g., underrepresented groups or targeted for particular areas of the business such as women in operative roles) and be pro-active in terms of recruitment by using diversity websites, recruiters, statements |  |
| Use data to review key outcome data for staff and identify any areas for investigation or positive action (e.g., promotion, performance rewards, management development), this could include such things as coaching, reverse mentoring.  |  |
| Collect and report on pay gaps (gender, ethnicity, disability) and action plan where necessary |  |
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| ORGANISATIONAL CULTURE & LEADERSHIP | Review your values, strategy, objectives for EDI relevance. Use future opportunities to strengthen and create targets (use staff/customer engagement to develop and embed).  |  |
| Use staff feedback mechanisms (e.g., pulse surveys, staff forums) to collect views on inclusivity of the workplace – if staff feel they can bring their whole self to work.  |  |
| Review how any staff feedback is used to change practices. |  |
| Plan a calendar of awareness raising and celebration events or recognition across the year and ensure this is shared externally with customers and other stakeholders.  |  |
| Review if staff network(s) could be created and how they would feed into decision making. |  |
| Review your internal and external communications in terms of accessibility and inclusivity in messaging and any responses to external events (e.g., Black Lives Matter)  |  |
| Review what you have in place to support diverse needs of staff (e.g., policies such as flexible working or menopause or initiatives such as mental health first aiders) |  |
|  | Review the Executive/Leadership Team’s and board’s expressed commitment and involvement in EDI (e.g., policies, statements, regular reporting, discussions) and any personal or organisational targets.  |  |
|  | Use annual appraisal and other mechanisms for exploring psychological safety with board openness and discussions on EDI.  |  |
|  | Review EDI policy, strategy, action plan (and any specific targets or policies in place or required) and how these are monitored and reported against (including what is shared with staff, customers and stakeholders) |  |
|  | Review your Equality Impact Assessment process, monitoring and training.  |  |
|  | Review how you make progress on EDI. Is through a designated officer, group, pursuing accreditation or other process. How does this feed into strategic priorities and senior (including board) level discussions. Review if you need more resources or senior backing.  |  |
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| CUSTOMERS & COMMUNITY | Review what mechanisms you have for customers to engage with and influence the organisation on a strategic as well as operational level and if they are accessible. |  |
| Review the accessibility of your communications including your website (against accessibility standards) and how you understand and respect individual preferences. |  |
|  | Review how services are designed and refreshed and what methods are used to ensure they are fair and equitable (e.g., customer EDI data, insights, engagement, complaints, Equality Impact Assessments) |  |
|  | Review your complaints process to ensure all customers have information on how to complain, that you are complaint with equality requirements and that you are using complaints information to learn and improve services, including their accessibility.  |  |
|  | Use case studies to learn where you have done things right or wrong (e.g., complaints with an EDI lens) and how to make improvements. |  |
|  | Review what social value initiatives or support you are providing to those at risk of being marginalised (e.g., health and wellbeing, financial or digital inclusion) |  |
|  | Review your activities and partnership working locally and how you are addressing equality of opportunity, wellbeing, inclusion and supporting marginalised and vulnerable people (e.g., action with the police on ASB, social value requirements through your procurement process) |  |

Documents considered

RSH Proposed New Consumer Standards (from April 2024)

NHF Code of Governance 2020

NHF EDI Data Tool

Housing Diversity Network Accreditation incorporating RACE Equality Code

Better Social Housing Review