

Equality, Diversity and Inclusion(EDI) Policy

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Purpose

The Chartered Institute of Public Finance and Accountancy (CIPFA) is the global professional body for public finance professionals and recognises practitioners at every level, from those starting out in their career to those innovating and leading the profession. CIPFA organises, sets and runs professional examinations and assessments to enable our members to attain high levels of competence in the field of public finance.

CIPFA is committed to eliminating discrimination, promoting equity, and advancing equality of opportunity on the grounds of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief (including lack of belief), sex and sexual orientation. We are also committed to fostering a culture of diversity and inclusion across our staff, membership and wider community.

Scope

This policy applies to all CIPFA staff, contractors, members, students and stakeholders. Our statutory duties are outlined in the Equality Act 2010, the Data Protection Act 2018 (UK GDPR), and, where relevant, the Public Sector Equality Duty (Section 149, Equality Act 2010). CIPFA will also act in accordance with the Human Rights Act 1998 in ensuring dignity, fairness, and respect in all its operations.

This document outlines the principles of Equality, Diversity and Inclusion (EDI) as applied to all staff, contractors, learners, members and qualifications. Further provisions for employees can be found in the CIPFA Staff Handbook.

Equality, Diversity and Inclusion Definitions

Definitions

EDI refers to practices that promote fair treatment, full participation, and opportunity for all. These principles aim to eradicate prejudice and discrimination based on an individual's or group's protected characteristics.

Equality is about ensuring individuals or groups are not treated less favourably due to personal characteristics. It includes creating equitable opportunities through appropriate support or adjustments.

Diversity refers to recognising, respecting and valuing the differences among people in backgrounds, perspectives and experiences.

Inclusion means creating an environment where everyone feels respected, valued, and empowered to participate fully, including through managing unconscious bias.

Protected characteristics

This policy is aligned with the Equality Act 2010 and covers the following protected characteristics:

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

In addition to the protected characteristics above, the Equality Act 2010 extends some of these protections to characteristics that were previously not covered by equality legislation.

Types of Discrimination

Type	Definition
Direct discrimination	Less favourable treatment due to a protected characteristic
Indirect discrimination	A neutral policy or rule that disadvantages people with a protected characteristic
Associative discrimination	Discrimination based on association with someone who has a protected characteristic
Perceptive discrimination	Discrimination based on the belief that someone has a protected characteristic, whether or not they do
Harassment	Unwanted conduct related to a protected characteristic that violates dignity or creates a hostile environment
Victimisation	Disadvantage suffered due to raising or supporting a complaint under the Equality Act

CIPFA acknowledges the impact of exclusionary behaviours such as microaggressions and will take appropriate action where such behaviours are reported or identified.

Assessment design, development and delivery

During the development of assessment materials, CIPFA takes active steps to embed equality, diversity and inclusion (EDI) principles throughout the design and review process. Assessment content is subject to equality impact reviews to ensure it is free from bias, culturally sensitive, and accessible to all learners.

Language, format, and context are scrutinised during Question Paper Evaluation Meetings (QPEC) to avoid disadvantage to any group, particularly those with protected characteristics under the Equality Act 2010. All assessors and assessment developers and reviewers receive training on unconscious bias and inclusive assessment design. Furthermore, assessment processes will focus on:

- Bias mitigation: Assessment instruments will follow regulated processes and be pre-

reviewed to ensure clarity and fairness

- Reasonable adjustments: Adjustments will be made in line with Ofqual Condition G6 to remove barriers while maintaining assessment validity
- Unconscious bias: Assessors will be trained to recognise and mitigate unconscious bias in both face-to-face and online assessments.

Roles and responsibilities

Overview

The Senior Management Team holds overall responsibility for the implementation and review of this policy. However, all individuals working for or on behalf of CIPFA share responsibility for upholding EDI principles.

All CIPFA staff are expected to:

- Encourage inclusive and non-discriminatory practices
- Report incidents that contravene this policy
- Treat colleagues, members, students and stakeholders with respect
- Undertake regular EDI training.

The P&C department will:

- Ensure all policies align with current legislation and good practice.
- Monitor compliance and provide regular EDI training.
- Use equality data for continuous improvement.

CIPFA members must:

- Promote and uphold EDI principles when interacting with staff and other members
- Report any behaviours that breach this policy
- Senior Management Responsibilities

Senior leaders must:

- Ensure fair and consistent application of EDI principles in recruitment, performance management, progression and disciplinary processes
- Lead the implementation and understanding of this policy
- Be accountable for EDI performance and culture.

Application of this Policy

Recruitment, Selection and Admission

All recruitment and admission practices will reflect this policy. Staff involved in these processes will be trained in EDI principles. Promotional material will reflect inclusive messaging.

Disciplinary, Assessment Offence and Complaint Policies

These will be applied consistently, transparently, and in line with EDI principles.

Data monitoring and collection

CIPFA collects and processes personal data in accordance with the Data Protection Act 2018 and UK GDPR. The Senior Management Team is responsible for analysing protected characteristic data relating to enrolment, retention, achievement and progression.

This data will inform targeted action to improve equality and ensure compliance with regulatory and legislative expectations.

Evaluative reports will be reviewed periodically to develop responsive and inclusive practices.

Policy version and owner

Policy owner	Head of Qualifications Innovation and Development
Version	1.3
Update	September 2025
Approval	September 2025
Policy review date	September 2026

Regulatory references

This policy is underpinned by the following regulatory and legal frameworks:

Ofqual General Conditions of Recognition
Condition D1: Fitness for purpose of qualifications
Condition D2: Accessibility of qualifications
Condition G6: Arrangements for Reasonable Adjustments
Other legislation
Equality Act 2010
Data Protection Act 2018 (UK GDPR)
Human Rights Act 1998
Public Sector Equality Duty (where applicable)