

# 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 and advancing equality on the grounds of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion and belief (including lack of belief), sex and sexual orientation.

## Scope

Equality, diversity and inclusion is a requirement by law, our statutory duty is outlined within the Equality Act (2010). This document sets out the principles of Equality, Diversity and Inclusion as applied to CIPFA staff and the membership body. The CIPFA Staff Handbook contains a further Equal Opportunities Policy with relation to all staff and contractors.

## Equality, Diversity and Inclusion Definitions

### Definitions

Equality, Diversity and Inclusion (EDI) – EDI practices, and the policies which reinforce them, aim to ensure fair treatment and opportunity for all. EDI practices aim to eradicate prejudice and discrimination on the basis of an individual or group of individual's protected characteristics.

Equality – Central to equality is fairness: CIPFA ensures that individuals, or groups of individuals, are not treated less favourably because of their characteristics. This includes creating equality of opportunity, CIPFA aims to ensure that those who may be disadvantaged have the tools available to access the same, fair opportunities as their peers.

Diversity – A diverse environment is one with a wide range of backgrounds and mindsets, which allows for an empowered culture of creativity and innovation. CIPFA recognises and respects the differences across our staff and membership bodies.

Inclusion – CIPFA aims to create an environment where everyone feels welcome and valued. An inclusive environment requires us all to become aware of our unconscious biases, and learn how to manage them.

## Protected characteristics

This EDI Policy covers all levels of membership and refers to the Protected Characteristics defined by the Equality Act 2010 as:

- age
- disability
- gender reassignment
- marriage and civil partnership
- pregnancy and maternity
- race
- religion or belief
- sex
- sexual orientation.

## Discrimination definitions

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.

There are a number of different types of discrimination under this legislation, and the table below gives an overview of the definitions.

Category	
<b>Direct discrimination</b>	Direct discrimination occurs when someone is treated less favourably than another person because of a protected characteristic they have or are thought to have.
<b>Indirect discrimination</b>	This occurs when a condition, rule or policy/practice is applied which in theory, is applied to everyone but in practice, intentionally or not.
<b>Associative discrimination</b>	This is direct discrimination against someone because they are associated with another person who possesses a protected characteristic.
<b>Discrimination by perception</b>	This is direct discrimination against someone because others think that they possess a particular protected characteristic. They do not necessarily have to possess the characteristic, just be perceived to.
<b>Harassment</b>	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”. Individuals may complain of behaviour that they find offensive even if it is not directed at them and the complainant need not possess the relevant characteristic themselves. Employees are also protected from harassment because of perception and association. The intention is irrelevant.
<b>Victimisation</b>	This occurs when a party is subjected to a detriment, such as being denied a training opportunity or a promotion because they made or supported a complaint or raised a grievance under the Equality Act 2010, or because they are suspected of doing so or are about to do so.

## Roles and responsibilities

### Overview

The CIPFA Senior Management Team will have overall responsibility for ensuring this policy is effective. However, all individuals working for and on behalf of CIPFA have responsibility for the implementation of this policy.

### Role of staff

All staff at CIPFA have the following responsibilities with respect to adherence to this Equality, Diversity and Inclusion Policy:

- to actively encourage non-discriminatory practices and to report any incidences of behaviour that fail to comply with this Policy
- to be aware of and support this Policy in carrying out their duties
- treat fellow employees, members, job applicants, associates, and clients with respect and without discrimination or harassment and to raise any concerns regarding inappropriate behaviour with their line manager or HR
- to undertake appropriate equality, diversity and inclusion training

CIPFA will do all it can to promote good practice in this area in order to eliminate discrimination and harassment as far as is reasonably possible. The HR department will work with all employees to ensure consistent application of this policy by:

- ensuring all policies comply with and reflect the spirit of Equality legislation and guidelines for good practice
- ensuring appropriate guidance and training is provided
- ensuring any data collected by the organisation on equality issues is monitored and reviewed for any corrective action.

### Role of members

When interacting with staff or fellow members, CIPFA members have the following responsibilities with respect to adherence to this Equality, Diversity and Inclusion Policy:

- to actively encourage non-discriminatory practices and to report any incidences of behaviour that fails to comply with this Policy
- to be aware of equality, diversity and inclusion issues and their responsibility under the terms of this Policy and national legislation

## Role of Senior Management Team

With respect to this Equality, Diversity and Inclusion Policy, senior management are responsible:

- to ensure that staff receive appropriate EDI training
- to ensure that selection and appointment procedures, performance management processes, staff development opportunities, and disciplinary and grievance processes are fairly and consistently applied to all staff
- to provide leadership in the implementation, operation and understanding of this Policy
- to be accountable for any issues concerned with failure to adhere to this Policy
- to provide leadership in the implementation, operation and understanding of this Policy

## Application of this Policy

### Recruitment, Selection and Admission

All information contained on the CIPFA website, and other material used in the recruitment of members, will promote the principles of equality, diversity and inclusion outlined in this Policy. All staff involved in the recruitment, selection and admission of students will have an awareness of equality, diversity and inclusion.

### Assessment

There will be clear, consistent and transparent criteria for student assessments and all assessments will take place on an equal opportunities basis and will also allow reasonable adjustments to be made.

- Assessment bias - Assessment instruments must be devised, delivered and marked following set processes, templates and consideration to regulatory conditions, to reduce the occurrence of unintentional bias. Any perceived threat of bias can affect student performance understanding and achievement. Occurrence of this within qualification development and assessment development risks ethical and equality issues as well as students' experiences. CIPFA will design and develop qualification and assessment material so that it reduces ambiguity. Additionally, assessment will be evaluated prior to release to students to monitor these aspects.
- Unconscious bias - CIPFA will raise awareness of unconscious bias during training and development of the assessment team so that during End-point assessment, both face-to-face and online, our assessors mitigate projecting their biases onto students.

### Disciplinary, Assessment Offence and Complaint Policies

Disciplinary, Assessment Offence and Complaint policies and procedures will be applied fairly and transparently for all students.

## Data monitoring and collection

The personal data of members and staff are collected and used in accordance with the Data Protection Act (2018). The Senior Management Team are collectively responsible for monitoring the data available for each of the protected characteristics and taking appropriate action to advance equality, diversity and inclusion. These senior staff monitor student member enrolment, retention, and achievement at appropriate points throughout the year.

Evaluative reports present and evaluate this data with the aim to develop appropriate policies and practices to reduce inequalities wherever possible.

## Policy version and owner

Policy owner	Head of Qualifications & Membership
Version	1.0
Update	September 2022
Approval	SMB 05 September 2022
Policy review date	September 2023

## Regulatory references

<b>Ofqual General Conditions of Recognition</b>
Condition D1: Fitness for purpose of qualifications
Condition D2: Accessibility of qualifications
Condition G6: Arrangements for Reasonable Adjustments