

YOUR EDI JOURNEY



START



At the start you should gain understanding, know your needs and apply legal, regulatory and/or professional standards to yourself and the organisation, such as:

- **Equality Act 2010**
- **Universal Declaration of Human Rights**
- **FCA PS 22/3**
- **CII Code of Ethics**
- **Consumer Duty 2022**

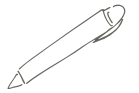
Research, survey and collate data and analyse against the above to determine:

- **Organisation demographics**
- **Legally required data:** e.g. organisations with 250+ personnel: gender & ethnicity reporting

MONTH 1

MONTHS 2&3

SIGN-OFF



Ensure CEO/leadership vocalises support through clear statements and advocacy of the promotion and inclusion of underrepresented employees at all levels. Set **actionable and measurable targets** for representation at the Board, C-suite, and senior leadership levels. **Establish KPIs** of inclusion and diversity, hold you and your organisation accountable for meeting them, and report your progress. **Report and publicise data**, including gender and ethnicity pay-gap figures. Designate Executive Sponsor(s) Ownership, Committees action agreement(s) and Sign Off.

EDI DELIVERY



Determine inclusive **succession planning**, recruit for now and the future. Based on your identified needs set targets to improve diversity among employees at all levels now and build a pipeline of opportunity for the future. Establish **independent D&I stream(s)** e.g. Gender, Ethnicity, Disability with a dedicated strategy and budget.

MONTHS 4&5

MONTHS 6&7

EDI DEVELOPMENT



Create, develop and maintain talent pipelines of underrepresented candidates for C-suite, senior leadership, and managerial positions. Develop programmes creating paths for underrepresented talent to reach senior leadership roles.

EDI INCLUSIVE CULTURE DRIVE



Use and encourage use of Inclusive language and behaviours.

Review all organisation resources, consider and remove any with non inclusive language or references. Scrutinise recruitment, work with diverse recruiters, underrepresented talent jobs boards and commit to blind recruitment processes. Where possible, ensure a diverse set of candidates is presented at all key positions, and that all interview panels are diverse.

MONTH 8

MONTHS 9&10

LEARN & DEVELOP



D&I stream(s) e.g., Gender, Ethnicity, Disability etc which are organisation led with a dedicated strategy/budget.

Commit to research projects that examine and raise awareness about the complexities of non-inclusion in the workplace.

Enable and sponsor Employee Resource Groups voluntary employee-led diversity and inclusion initiatives supported by leadership. Understand and implement effective approaches to increasing awareness and influencing behaviour in relation to unconscious biases.

Implement **structured mentorship programmes** for underrepresented employees.

Ask employees during performance reviews about their development needs and goals, paying particular attention to the needs of underrepresented employees. Determine and **agree sustainable development plans** with SMART outcomes/objectives.

SPONSORSHIP PARTNER



Sponsor industry associations and networks focused on **improving the corporate experience of underrepresented professionals**. Support and donate to charities established to combat non-inclusion.

MONTHS 11&12

LAUNCH



Promote and share plan.

Provide information and offer learning opportunities, e.g. Lunch and Learns and discussion opportunities to embed EDI.

REVIEW



Regularly review, revise and enhance as appropriate at regular intervals e.g. quarterly or bi-annually.

MONTH 13

MONTH 14





Useful Information and reading

- UK Government: [Equality & Diversity](#)
- United Nations: [Universal Declaration of Human Rights](#)
- FCA Consumer Duty: [Finalised Guidance FG22/5 Final non-Handbook Guidance for firms on the Consumer Duty](#) considers the needs, characteristics, and objectives of customers – including those with characteristics of vulnerability.
- Chartered Institute of Personnel & Development: [Equality, Diversity & Inclusion](#)
- Chartered Insurance Institute: [CII Code of Ethics \(Practical Guide\)](#)
- Chartered Insurance Institute: [Supporting Diversity in the profession](#) – CII Inclusive Language Guidelines - www.cii.co.uk and E: EDI@cii.co.uk
- Chartered Insurance Institute: [Financially Inclusive Customer Outcomes: a Companion to the CII Code of Ethics](#)
- Advisory, Conciliation and Arbitration Service (ACAS) UK: [Improving equality, diversity and inclusion in your workplace](#)
- Frost, Stephen (2022) [“The Key to Inclusion: A Practical Guide to Diversity, Equity and Belonging for You, Your Team and Your Organization”](#) Kogan Page

Protected Characteristics Information Sources

- Age – [Age UK](#)
- Disability – [Disability UK](#)
- Gender reassignment – [Gender Identity Research & Education Society](#)
- Marriage and Civil Partnership – [Relate](#)
- Pregnancy & Maternity – [Family Planning Association](#)
- Race (Ethnicity) – [Race Equality Foundation](#) – [Race Equality Matters](#) and [Runnymede Trust](#)
- Religion or Belief – [Interfaith Network](#)
- Sex – [NHS - Sex, gender and sexuality](#)
- Sexual Orientation – [Stonewall](#) and [Kaleidoscope Trust](#)