Reed Talent Solutions



EDI&B policy creation guidance and checklist

Creating an equality, diversity, inclusion, and belonging (EDI&B) policy involves several steps to ensure your organisation promotes an inclusive environment.

Our step-by-step guide outlines all the considerations you need to take account of when creating an EDI&B strategy.

I. Define your objectives

The purpose of your EDI&B strategy

- Identify the primary goals of your EDI&B strategy.
- Determine the scope of your policy, including areas of focus, such as recruitment, retention and training, departments, and levels in the organisation.

Answer the following questions to help define your objectives:

Why do we need an EDI&B policy?

How will we implement the policy?

What is the scope of your EDI&B policy?

(Set out the scope and applicability of your policy – this ensures clarity among employees and can be pointed to in case any policies are contested)

How will the success of the EDI&B policy, and of EDI&B within the organisation, be measured?

2. Establish a steering committee

- **Form a group made up of representatives from diverse backgrounds and key departments.**
- **Assign people within this team with roles and responsibilities for implementing and monitoring your policy.**

3. Assess your existing EDI&B performance and engage with stakeholders

- **To avoid an EDI&B policy being performative or inauthentic, research how your workforce feels by conducting surveys or holding focus groups.**
- **Use the data collected in this way to analyse the current state of equality, diversity, inclusion, and belonging within your organisation.**
- **Identify any gaps and areas which need improvement.**

When holding focus groups, use this checklist:

- [ ] Define your objectives (identify the purpose of the group, what you want to learn, and set clear goals)
- [ ] Plan the focus group (select participants and recruit them, using incentives if necessary, then schedule your session(s) and select a venue)
- [ ] Create a discussion guide (produce a list of open-ended questions and arrange them in logical order – have follow-up questions ready prepared)
- [ ] Prepare for the session (select a skilled moderator to facilitate the discussion, ensuring they understand the objectives, then arrange audio/video recording equipment and/or note-taking tools)
- [ ] Conduct the focus group (explain the purpose of the group and set ground rules for the discussion, use your discussion guide to facilitate the conversation while giving everyone the chance to speak)
- [ ] Analyse your data (look for insights and themes from the discussions)
- [ ] Report your findings (highlight the main findings and how they relate to your objectives, offer actionable recommendations, and present your findings to stakeholders)
- [ ] Follow-up (ensure you thank participants for taking part, send them a summary of the findings and apply any insights gained to your policy)

4. Develop a vision and mission statement

- Create a clear, compelling vision for equality, diversity, inclusion, and belonging within your organisation.
- Be sure to include both short- and long-term objectives.

Your mission statement

(Clearly define your organisation's commitment to EDI&B)

5. Craft your policies and procedures

- Develop or update policies to promote EDI&B, and ensure these policies comply with relevant laws and regulations.
- Define key terms related to EDI&B that will be included within your policies and assess how they relate to your workplace (e.g... accessibility, harassment, ethnicity, etc).
- Ensure all policies and procedures cover the protected characteristics, as defined under The Equality Act 2010, namely: age, disability, gender reassignment, marriage or civil partnership, pregnancy and maternity, race, religion or belief, sex, sexual orientation.

As part of your EDI&B policy, outline separate policies for:

Discrimination and harassment policy

(Develop policy related to prohibiting discrimination and harassment based around the protected characteristics listed above)

Diversity and inclusion initiatives

(Outline specific programmes and strategies to promote diversity and inclusion, including an inclusive recruitment and hiring policy)

Flexible working arrangement policy

Accessibility policy

(Consider provision for those with disabilities and provide a commitment to offering accommodations for those employees)

Inclusive benefits and wellness programme policy

(Develop policy to promote equality and fairness in all aspects of work)

Maternity/paternity and adoption policy

6. Design training and development programmes

- Create training programmes on EDI&B for all employees.
- Provide leadership training to ensure managers can effectively support the strategy.

Outline your training and development programmes

(Highlight organisational commitment to providing training based on equality, diversity, inclusion, and belonging topics)

7. Implement recruitment and retention strategies

- Develop inclusive recruitment practices to attract diverse talent.
- Create retention policies that will support and advance underrepresented groups within your organisation.

8. Promote an inclusive culture and develop communication plans

- Encourage practices which foster an inclusive environment, such as the formation of employee resource groups and mentorship programmes.
- Celebrate diversity via events, communications, and recognition programmes.
- Create a plan to communicate your strategy, goals, and progress to stakeholders.
- Ensure transparency and provide regular updates.

9. Monitor and evaluate progress

- Establish metrics and key performance indicators to measure progress.
- Conduct regular reviews and adjust your strategy as needed based on feedback from employees and focus groups.

Accountability and measurement

(Measure the success of all your policies and be prepared to re-evaluate, and establish mechanisms to hold leaders to account)

10. Define your EDI&B policy

Once you have collected and analysed all the information you need, then it is time to define your EDI&B strategy.

Your strategy should be:

- Aligned to your organisational values
- Inclusive and representative of a range of views
- Authentic and genuine
- A conversation with different groups, not without them

Even after your strategy has been defined, that is not the final step. A good EDI&B policy will be constantly refined and updated to recognise developments within the field generally and in your own organisation.

To do this, you should:

- **Provide regular updated to all stakeholders outlining your progress and achievements.**
- **Publish an annual report on your equality, diversity, inclusion, and belonging efforts and outcomes.**
- **Ensure that EDI&B practices are integrated into ongoing operations and company culture.**
- **Encourage continuous improvement and innovation in EDI&B initiatives.**

