

EDI Audit Recommendations – June 2023 Update, next update Autumn 2023

Key to shading:

Good progress	
Currently working on	
To be discussed further	

Belonging and values

Recommendation	Executive Team Response
Create a shared vision and strategy for EDI rooted in anti-oppressive practice, and with tangible goals that are embedded in ST's business plan	<ul style="list-style-type: none"> • Creation of the EDI Mission, Vision and Objectives as part of the 2022-2024 Strategic Plan – recommend this is approved in September Trustee Board meeting 2023 • Regular updates on progress are being provided to the Quarterly ED&I group
Develop a more robust EDI policy and statement, with associated behaviour frameworks for staff	<ul style="list-style-type: none"> • HR consultant will be reviewing and updating HR policies through an EDI lens in June and July 2023 • Have appointed external HR consultant, who is expert in EDI. Training has been undertaken with staff, behavioural framework has been developed as part of appraisal/personal development process and People Strategy
Use staff demographic data to identify and address underrepresentation. Develop regular EDI feedback mechanisms (e.g., annual staff survey) to better understand, monitor and evaluate the experiences of staff from marginalised backgrounds and the inclusivity of the culture at Smallwood Trust.	<ul style="list-style-type: none"> • We have started using demographic data to address underrepresentation. We have used our data to inform our recruitment for the new Programme Manager role and we are now working alongside inclusive recruitment agencies • The People Strategy has been approved by the Board • EDI feedback in team meetings is happening and Quarterly Management meetings have been scheduled to review and analyse feedback
Introduce regular opportunities for staff to engage in challenging conversations around EDI. Alongside this, in collaboration with staff develop safe spaces to talk about marginalised experiences.	<ul style="list-style-type: none"> • We have regular monthly all staff meetings where we discuss EDI • We have undertaken internal training • 1 to 1 coaching sessions have been offered to all staff • We have developed intentional space for challenging conversations and safe spaces around ED&I issues
Invest specifically in line management skills and guidance in how to create an inclusive workplace, from the point of induction	<ul style="list-style-type: none"> • Line management training is taking place • 1 to 1 coaching for managers has been offered.

Representation and power

Recommendation	Executive Team Response
<p>During the EDI visioning process, explore and articulate a shared organisational view as to why representation of the communities Smallwood Trust seeks to serve is integral to Smallwood Trust's organisational purpose</p>	<ul style="list-style-type: none"> • This was part of the initial EDI audit work undertaken by an external provider and has also taken place throughout the year in various team forums • The development of co-production/embedding lived experience initiatives are being implemented • Is taking place through Gendered Poverty Learning Program such as the shifting power initiatives, the communities of practise that are being developed and conversations about marginalised groups and how they can have a voice at our table
<p>Prioritise diversification and representation on the Board and at senior levels to ensure that culture change can be led from the top, and that lived experience is shaping Smallwood Trust's decisions and services.</p>	<ul style="list-style-type: none"> • This work started with previous Board recruitment • There is an opportunity to strengthen this through succession planning which is part of our Governance Action Plan • Board Shadowing Programme provides opportunities for women with lived experience to participate at governance level
<p>Define and regularly discuss Smallwood Trust's political stance and policy positions to ensure that it advocates and amplifies the voices of women in poverty</p>	<ul style="list-style-type: none"> • In the main current comms activities are focused on highlighting the impact of the grants and the organisations we fund • There is consensus for more influencing activity, but further debate is required about what <u>political</u> stances (if any) we may want to take and <u>how</u> we can advocate and amplify
<p>Build on existing feedback mechanisms, tackle barriers to engagement, and explore new opportunities, to enable beneficiaries with lived experience, and recipient organisations to shape Smallwood Trust's services, grant-making processes.</p>	<ul style="list-style-type: none"> • Lived experience has contributed to the grant-making and strategy development through our evaluation and learning activities • 30% of 2023 grants budget is devolved to community grant partners • As part of Strategic Plan, we have formed a partnership to develop a co-produced grants programme with local communities • Learning workshops/ Community of Practice have been organised as part of the current workplan to build on the shifting of power through our community grant partnerships • The second round of the Women's Urgent Support Fund will be co-designed
<p>Develop clear mechanisms for all staff, particularly frontline staff, to engage with the Board, leadership team and decision-making processes, including ways to feed back when those mechanisms have not worked effectively.</p>	<ul style="list-style-type: none"> • Decisions on HQ grants to individuals are devolved to the Grants Managers • Mechanisms such as the mission moment have been instilled so that Board and staff can meet at planned times. • As part of People Strategy the HR consultant has created feedback and reporting activities and is actively working with the management team and staff to instil the activities operationally

Processes

Recommendation	Executive Team Response
<p>Review HR policies through an EDI lens and create supporting guidance for line managers. Communicate policies clearly through the staff handbook and induction process. Review and update HR policies regularly in consultation with staff, actively encouraging staff to raise inequities as part of feedback processes.</p>	<ul style="list-style-type: none"> • Will update policies as per the recommendations in EDI Audit • Will work with HR consultant to develop response to detailed recommendations and update existing policies such as grievance etc, and/or create new policies eg. trans inclusion. This work will commence in the summer of 2023 • Opportunity to build on existing support to staff based on what they want/need. Eg. We currently have an employee assistance scheme and have recent strengthened abusive caller protocol
<p>Review staff recruitment processes from start to finish, looking at job design, advertisement routes and selection processes. Prioritise removing barriers and encouraging applications in current areas of underrepresentation within the communities Smallwood Trust serves. Develop inclusive recruitment training and guidance to support this.</p>	<ul style="list-style-type: none"> • We have reviewed and updated our recruitment processes and are working with inclusive recruitment agencies. We have implemented a positive action process into our recruitment practise, implemented values based interviewing, held a QnA for applicants who may not have had the courage to apply for our roles and have taken on board how to be more equitable to applicants who have diverse needs by sending out the interview questions before interview • We have undertaken job design process through an EDI lens.

Progression

Recommendation	Executive Team Response
Ensure all staff undergo a learning programme covering; power and privilege, microaggressions, having challenging conversations and EDI action planning/commitment setting	<ul style="list-style-type: none"> • Sessions have been delivered on EDI, Growth Mindsets, Motivation, Coaching and Having Challenging Conversations. Further sessions are ongoing and we have planned workshops on Shifting Power and Co Production. • We are also running regular monthly staff devt sessions / team meetings on strategic plan delivery
Equip staff with the tools, knowledge, and confidence to understand and apply a 'gender lens' and an intersectional approach in the design and delivery of work, services, and projects (e.g., create and use a simple equity and inclusion impact assessment tool for ST	<ul style="list-style-type: none"> • This has started through our Gendered Poverty Learning Programme and is part of our org devt sessions and will be further strengthened through training and development activities as a team and individually • Decisions on HQ grants to individuals are devolved to staff • Co-design work is being taken forward where the Smallwood team will be working in partnership with local communities on new grant programmes
Explore opportunities for reverse mentoring for staff, leadership, and the Board	<ul style="list-style-type: none"> • This needs further discussion especially regarding time pressures / implementation • We are planning visits for Board and staff members to visit grant partners to hear their perspective and share learning
Ensure that women with lived experience are valued and adequately compensated for sharing skills and experience	<ul style="list-style-type: none"> • We have agreed to compensate women with lived experience for their time for the co-production programme, Board shadowing programme and for Smallwood workshops
Proactively foster a culture of learning and practice at Smallwood Trust, ensuring that all staff have regular opportunities to learn from sector partnerships, and particularly those which reflect intersectionality, shifting power and equitable grant making	<ul style="list-style-type: none"> • We have introduced a team learning programme building on existing work • We are developing a programme of visits/learning opportunities with the orgs we fund (eg. programme workshops) • Co-produced programme as per above • Gendered Poverty Learning Programme • We have reviewed and developed a value based appraisal and personal development plan with EDI as one of the core values as part of People Strategy

Awareness and learning

Recommendation	Executive Team Response
Equip staff with the tools, knowledge, and confidence to understand and apply a 'gender lens' and an intersectional approach in the design and delivery of work, services, and projects (e.g., create and use a simple equity and inclusion impact assessment tool for ST	<ul style="list-style-type: none"> • This has started and is part of our org devt sessions on delivering the strategic plan and will be further strengthened through training and development activities as a team and individually. Staff are working with local communities to coproduce new grant programs, the gendered poverty learning program will shortly come into place and staff training has been developed • We aim to produce resources for coproducing grants which we will make available to staff and we aim to share our learning externally
Collect specific feedback (via staff survey) and monitor the retention and progression of all staff to identify where marginalised staff may face barriers.	<ul style="list-style-type: none"> • Incorporated as part of People Strategy and takes place via a variety of mechanisms including quarterly management meetings, in the staff appraisal and in the exit interview forms
Work with marginalised staff to identify opportunities for development and progression e.g. to practice skills or access to formal/informal networks, mentoring or coaching	<ul style="list-style-type: none"> • We have provided progression opportunities for three staff recently (we are a team of 10). All three staff have lived experience of some of the issues that Smallwood is aiming to tackle through its grants programmes • Further opportunities for role and skills development have been identified as we implement the 2022-2024 Strategic Plan and new appraisal process
Ensure that exit interviews adequately address equity, diversity and inclusion to establish any barriers to marginalised staffs' sense of belonging and ability to thrive and develop at Smallwood Trust	<ul style="list-style-type: none"> • Incorporated into the People Strategy, exit questionnaires are in the process of being developed
Provide transparency around progression criteria, routes and opportunities, and proactively explore development opportunities marginalised staff may need to access those routes	<ul style="list-style-type: none"> • Salary benchmarking / incremental scales have been implemented • Increased opportunities for role and skills development as part of 2022-2024 strategy and Gendered Poverty Learning Programme • Incorporated in People Strategy • Recent promotion of 3 members of staff • Bespoke mini workshops were developed to support those staff into their new roles

Collaboration

Recommendation	Executive Team Response
<p>During the EDI visioning process, define and agree the role that Smallwood Trust seeks to play in the wider sector, building on the EDI commitments in the 22-24 strategic plan, including, how ST can use its role as an investor to influence others to take an anti-oppressive approach and equitable grant-making</p>	<ul style="list-style-type: none"> • Co-produced programme with partners and local communities • We have invested c. £2.1m in place-based initiative which take an intersectional approach • Sharing practice with other stakeholders eg. shadowing programme, ACO, ACF networks • Opportunities with potential new external co-funding partnerships • Informal feedback that other funders are adopting similar processes
<p>Facilitate a cross-organisational conversation to define an equitable, intersectional and anti-oppressive approach and framework for collaboration at Smallwood Trust</p>	<ul style="list-style-type: none"> • We have developed and implemented a theory of change / gender-lens framework which has resulted in delivery of significant funding this year through place-based initiative • There is more work to be done to expand and align this approach build the confidence of the team in talking and understanding equity and intersectionality • This work is important and ongoing through our team development activities
<p>Create and fund opportunities to share learning and best practice on equity in the wider sector e.g. learning events.</p>	<ul style="list-style-type: none"> • We have appointed an external learning partner who are sharing learning through workshops • We are developing a co-produced grants programme • We are running a series of workshops with grant partners for which we pay a fee for their time • We paid a contribution for orgs time to complete final grant application proposals for the place-based fund • We have been invited to share some of our practice at grant-making forums and there are lots of further opps on this • Gendered Poverty Learning Programme
<p>Explore ways to develop more long-lasting and meaningful relationships with beneficiaries and recipient organisations. Explore how reciprocal learning could be built into grant processes, ensuring that women in poverty, community-led and grassroots organisations are compensated for their time</p>	<ul style="list-style-type: none"> • Majority of funding from 2023 for orgs is for three years. Coventry place-based initiative is year 4 of 6 years funding. • Majority of community grant partnerships will be receiving up to 6 years of grant funding • 30% of grants budget is devolved to community grant partners • We do pay fees / vouchers to compensate for time • All grant programmes have been built on a strong evidence, research and learning basis • There are many additional opportunities around co-production and more devolvement of power to deepen our relationships and embed reciprocal learning