



Enabling women to be financially resilient

EDI Audit Recommendations

Update Spring 2024

May 2024

EDI Audit Recommendations

– Update Spring 2024

Key to shading:

- Good progress Longer-term goals
- Currently working on Needs to be discussed
- Medium term goals

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"> • Draft EDI objectives will be incorporated into the review of the Strategic Plan, scheduled to be complete end of 2024
Develop a more robust EDI policy and statement, with associated behaviour frameworks for staff.	<ul style="list-style-type: none"> • People Strategy and Plan has been approved and is being implemented including EDI objectives embedded into appraisal and personal development objectives.
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 used demographic data to address underrepresentation. We worked alongside inclusive recruitment agency Radical Recruit for the appointment of two new Programme Managers in 2023 • 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"> • As part of our annual ‘EDI Week’ all staff present back on a topic of their choice. Next one is taking place in Feb 2023 at the staff away day • 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 has taken 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 work with an externally appointed agency and has also taken place throughout the year in various team forums • The development of co-production/embedding lived experience initiatives has been implemented • Is taking place through Gendered Poverty Learning Program such as the shifting power initiatives, the communities of practice 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 • A Governance Committee has been established in 2024 which will include this in succession planning discussions • Board Shadowing Programme has recruited 3rd cohort for 2024 • Board shadowees will be offered guaranteed interviews for future trustee vacancies
<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 how we can advocate and amplify • Smallwood’s potential role for influencing is on the Board agenda for 2024
<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 and will form part of the strategy review in 2024 • 30% of 2023 grants budget is devolved to community grant partners • As part of Strategic Plan, we have formed a partnership with Turn2Us and Buttle UK to develop a co-produced grants programme with beneficiaries • Learning workshops/ Community of Practise 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 has been co-produced as is the Local Resilience Fund in Newham and Hackney. Also early stages of developing a potential disability-led initiative with other funders.

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.

- Proposal to devolve re-funding decisions (eg. On community grant partnerships) to a participatory grants panel
- Mechanisms such as the mission moment have been implemented so that staff can present grant updates to the Board
- Programme of project visits for 2024 (eg. Staff/trustees could visit together)
- Opportunities for trustees / staff to work together (eg. EDI Group, Comms Plan)

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"> • HR Policies are being updated through an EDI lens as per the recommendations in the EDI Audit Report • 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. • We have recently agreed a trial benefit for all employees whereby they are entitled to up to £75 for a Health and Wellbeing voucher
<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 worked with an inclusive recruitment agency. We implemented a positive action process into our recruitment practice, 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
<p>Ensure all staff undergo a learning programme covering; power and privilege, microaggressions, having challenging conversations and EDI action planning/commitment setting.</p>	<ul style="list-style-type: none"> • Sessions have been delivered on EDI, Growth Mindsets, Motivation, Coaching and Having Challenging Conversations, Shifting Power and Co=production. • We are also running regular monthly staff devt sessions / team meetings on strategic plan delivery staff • Participatory approach with staff for strategy review in 2024
<p>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.</p>	<ul style="list-style-type: none"> • This is being delivered 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, such as the team away day in 2024 • Staff will contribute to the work on the language guide which is currently being developed • Staff are working with Renaisi, the external learning partner, on the place based programme which is encouraging internal learning • Some staff have volunteered and formed a working group to collaborate on a Language Guide which is currently being developed
<p>Explore opportunities for reverse mentoring for staff, leadership, and the Board.</p>	<ul style="list-style-type: none"> • This recommendation is being covered by actions above including mission moment, project visits, comms plan, work with the EDI Group etc
<p>Ensure that women with lived experience are valued and adequately compensated for sharing skills and experience.</p>	<ul style="list-style-type: none"> • We compensate women with lived experience for their time for the co-production programme, Board shadowing programme and for Smallwood workshops • We are also developing a set of guidelines for payment of lived expertise fees noting that there is not a one size fits all approach.
<p>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.</p>	<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 • Development of staff charter to look at our values and ways of working



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 • This also includes work with the Gendered Poverty Learning Programme and Renaisi • The participatory review of the strategy will also support this recommendation
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 to staff who identify as marginalised or have lived experience (we are a team of 12) • 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.
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 programmes • Place-based initiative which takes an intersectional approach • Sharing practice with other stakeholders eg. shadowing programme, ACO, ACF networks • Informal feedback that other funders are adopting similar processes (eg. Community grant partnerships)
<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 previously developed and implemented a theory of change / gender-lens framework and strategy which has resulted in delivery of significant funding • This conversation can develop and be refined through the review of the strategy in 2024
<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 number of lived experience models to support our grant-making • We are running a series of workshops with grant partners for which we pay a fee for their time • 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

Next review: by December 2024

