

**U3A TRAINING CONFERENCE
LEATHERHEAD
EQUALITIES TRAINING**

APRIL 2018

Introductions & Aims & Objectives

1. What is Equalities & an Equalities Framework?
2. Why is it important?
3. Benefits for local U3As.
4. What does it mean for U3As & Compliance?
5. Equalities Framework
6. Resources
7. Next Steps

Aims & Objectives

1. Increased understanding of legal responsibilities in relation to equality and inclusion
2. Share experience, approaches
3. Information on resources and support

EXERCISE 1 in twos or threes

4

- 1. What is 'Equality' ?**
- 2. Why is it important?**
- 3. The 9 Protected Characteristics under the 2010 Equalities Act**

Feedback Exercise 1

Protected Characteristics

1. Age
2. Disability
3. Gender reassignment
4. Marriage and civil partnership
5. Pregnancy and maternity
6. Race
7. Religion or belief
8. Sex
9. Sexual orientation

*“Equality is about ensuring that every individual has an equal opportunity to make the most of their lives and talents, and believing that no one should have poorer life chances because of where, what or whom they were born, what they believe, or whether they have a disability. Equality recognises that historically, certain groups of people with particular characteristics e.g. race, disability, sex and sexuality, have experienced discrimination.” **EHRC***

“ Equality is ensuring individuals or groups of individuals are not treated differently or less favourably , on the basis of their specific protected characteristic, including areas of race, gender, disability, religion or belief, sexual orientation and age” (Univ. of Edinburgh 2016)

“The right of different groups of people to have a similar social position and receive the same treatment “ (CED)

2. Why is it important?

- ❑ U3A values – inclusion/accountability to all existing and potential members
- ❑ Meeting charitable duties & good governance
- ❑ Enhances user/members involvement
- ❑ Maximising reach of the U3A

3. Benefits for U3As?

- Enhances/builds community links
- Builds community champions
- Reduces risk of legal challenge

3. Benefits for U3As?

- Acknowledges intersections of discrimination for example age and disability
- Reinforces local credibility
- Demonstrates good governance and effective policies

What does it mean for local U3As – Compliance & Legal Responsibilities

4. What does it mean for U3As?

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- Compliance with Equalities Act 2010 – See Handout 1 in Training pack bold**
- Oversight & Risks
- Policies & Procedures
- Access to Services to Members
- Communication & Language

4. What does it mean for U3As?

14

Areas of their U3A's charity's operations –

1. **Organisational Culture – Handout 3**
2. **Communications – Handout 4**
3. **Accessibility – Handout 2**

EXERCISE 2

Group A pairs

16

Have you developed a culture which recognises diversity, tackles inequality and promotes equality in all areas of activity?

(for prompt) See the 3 questions top of Handout 3)

Group B pairs

17

How do you promote the U3A within your community to ensure the greatest reach?

(NB for prompt see 3 Questions at top of Handout 4)

Group C pairs

18

What does your U3A do well and what could you improve?

(NB for prompt - See the 2 questions at top of Handout 2)

Feedback Exercise 2

5. An Equalities Framework for your local U3As

20

- **Equalities Statement**
- **Equalities Policy - Model Equalities Policy for local U3A groups – see Handout 7 in Training Pack**

5. An Equalities Framework

- ❑ A strategic approach - Linked to your aims and objectives, e.g. we want more members from x area or x community
- ❑ Monitor and review annually
- ❑ Use Testimonials/Case Studies e.g. in your Annual Report to show success

5. An Equalities Framework

- Consulting local community groups
- Get some local data
- Action Planning

Organisation Culture

- 1. Do you have equal opportunities policy statement?*
- 2. Do you have an equality & diversity policy which covers all areas of your operations?*
- 3. Is equality & diversity a topic within the induction of Trustees, staff and volunteers?*

Communications

- 1. Have you created links with other organisations / services?*
- 2. Communication methods that are fit for purpose for diversity of people?*
- 3. Do you have publicity/promotional materials that use range of images of people who are/or may become members?*

Access

- 1. What is profile & diversity of your membership?*
- 2. Have you reviewed your building/physical environment (and/or advice to local groups re use of buildings) to consider how those with disabilities can gain access?*
- 3. Have you reviewed your activities to ensure they are fit for purpose for diversity of people ?*

Reasonable Adjustment

*“Duty holders need to make **reasonable adjustments** where disabled customers (or employees) would otherwise be at a substantial disadvantage compared to non-disabled people.”*

“The Equality Act requires service providers to be proactive in identifying potential barriers to disabled people and to have a plan of action to reduce or eliminate these”

6. Resources

See Checklists in Pack & Handout 5

- Equality Act 2010 www.equalities.gov.uk
- Equality and Human Rights Commission – www.equalityhumanrights.com
- Government Equalities Office - www.homeoffice.gov.uk/equalities/equality-government
- Access to buildings and the equalities act: <http://www.building.co.uk/cpd-4-accessible-buildings-and-the-equality-act/5050478.article>
- Model Policies

7. Next Steps

- Review & summary
- Priorities 2018
- Agreed Committee Actions

U3A Training Conference - 5th April 2018 - De Vere Horsley Estate, Leatherhead KT24 6DT

No.Participants: Up to 50	75 minutes
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Objectives of Training: Participants will have an understanding of their role, legal responsibilities and benefits to U3A in relation to an Equalities Framework for local U3As. The training will include a presentation on the relevant legislation, discussion and review of some U3A-specific scenarios, as well as providing an opportunity to ask any questions.

Times	Activity	Learning Points	Resources
5 mins	Housekeeping, Introductions Discussion priorities Training Session	<i>Format of session</i>	Flip chart record aims
What are 'Equalities' and an 'Equalities Framework'? SLIDES 1 TO 11			
10 mins	<ul style="list-style-type: none"> ▪ What is 'Equalities'? ▪ Definitions ▪ Protected Characteristics ▪ Why is Equalities important? ▪ Benefits U3A, growth membership, wellbeing/ inclusive learning 	<i>Understanding of Equalities approaches and benefits to Members, and wider U3A</i>	Exercise 1 in two's PowerPoint handouts
10 mins	<i>Questions & Answers Feedback Exercise 1</i>		
Local U3A Board of Trustees - Legal Responsibilities SLIDES 12 TO 19			
10 Mins	Compliance 2010 Act Equalities Act. Good governance Implementation - <ul style="list-style-type: none"> ▪ Reasonable Adaptation ▪ Oversight & Reducing Risks ▪ Policies & Procedures ▪ Services to Members ▪ Communication & Language 	<i>Understanding of local U3As legal duties in relation to Equalities across its areas of operations</i>	Exercise 2 in two's PowerPoint Handouts
15 mins	Exercise 2		
10 mins	<ul style="list-style-type: none"> • Feedback Exercise 2 		
An Equalities Framework for local U3As SLIDES 20 TO 28			
10 mins	<ul style="list-style-type: none"> • Best Practice Approach – keeping informed • U3A Statements • Model Equalities local U3As • Monitoring & Review 	<i>Outline Equalities Framework Areas for local U3As</i>	PowerPoint Handouts
	<ul style="list-style-type: none"> • Action Plans • Resources for members/groups • Key follow on tasks 	<i>Agreed Follow on tasks</i>	PowerPoint Handouts
5 mins	Summary & Review Flip chart to review aims and learning		

U3A 5th April 2018, Leatherhead Training Conference

Equalities Training Pack

Contents

- 1. Charities & the Equality Act 2010**
- 2. Accessibility & Checklist**
- 3. Organisation Culture & Checklist**
- 4. Communications & Checklist**
- 5. Resources**
- 6. Model Equalities Policy for U3A**
- 7. Model Equalities Policy for local U3As**

HANDOUT 1. Charities and the Equality Act 2010

The Equality Act 2010 is relevant to all charities but affects them differently, depending on what each charity does and who it works with. Charity trustees must take equalities into account and consider whether their charity is complying with the law.

What should my charity do to check it complies with equality law?

1. Read the relevant guidance from the Equality and Human Rights Commission (EHRC) to be aware of the legal requirements that apply to your type of charity. Are you an employer, service provider or association of more than 25 people?

2. Consider if your charity is complying with general equality law. For instance, if you are providing services, are you discriminating in the way you provide these?

3. Check your charity's governing document to see if it limits its benefits to any group that shares a characteristic protected by the 2010 Act, such as gender. Any restriction must be stated in your governing document. Discuss whether your charity still needs these restrictions to achieve its charitable purposes.

What is the Equality Act 2010?

The 2010 Act is a Westminster law that applies in England, Scotland and Wales, which aims to prevent people being treated unfairly. Most of its provisions came into force in October 2010. This Act brings together a lot of existing anti-discrimination law into a single piece of legislation.

Since many requirements of the 2010 Act are not new, charities which have considered and complied with previous equality legislation will already be meeting most of its requirements.

The 2010 Act says that organisations cannot treat someone unfairly on the basis of what it calls 'protected characteristics', which are:

Protected Characteristics

1. Age
2. Disability
3. Gender reassignment
4. Marriage and civil partnership
5. Pregnancy and maternity
6. Race
7. Religion or belief
8. Sex
9. Sexual orientation

The 2010 Act has widened the scope of the protection given to people with these characteristics, and those associated with them. You cannot, for example, unfairly restrict services available to a helper who assists a disabled person, or to someone who has a 'hidden' disability, such as mental illness or epilepsy.

What are the effects of the 2010 Act on my charity?

The 2010 Act seeks to ensure that, in general, all organisations provide equal and fair treatment to all. As a matter of good practice, charity trustees might want to explain in an equality policy how they will make sure they treat people fairly, and think about whether training is needed.

If you are responsible for managing a charity you should familiarise yourself with the broader equality requirements that apply both to charities and other organisations. The 2010 Act will affect your charity if it:

- employs people
- has volunteers
- is an association with more than 25 members
- provides services, sells goods or offers facilities (even if you don't charge for these)
- carries out public functions

The 2010 Act includes a 'charity exception', which allows charities to restrict the people they benefit, but only if the restriction of benefits is specified in its governing document (constitution) and, it is either

- A. To prevent, or compensate for, a disadvantage, or
- B. A proportionate means of achieving a legitimate aim

The restriction must be permitted by the charity's constitution – but this by itself is not enough. Charities which restrict the benefits they provide must now be able to explain how by doing so they are either addressing disadvantage, or that this restriction is a fair, balanced and reasonable way to bring about a legitimate objective (which they must be able to identify). Charity trustees should consider if a restriction can be justified by either of the conditions above and how they would demonstrate that this is the case.

Public Function

When a charity has a public function, it may be subject to the public sector general equality duty to:

- Eliminate unlawful discrimination, harassment and victimisation
- Advance equality of opportunity between different groups
- Foster good relations between different groups

Your charity should check whether any public service it carries out means it has these duties.

HANDOUT 2. Accessibility & Checklist

Questions

1. *Do you ensure your services/ activities are accessible?*
2. *Are the inclusive of people from diverse backgrounds in your local area?*

What is profile & diversity of your local population? (E.g. age, gender and ethnicity, and disability, sexual orientation, religion and belief, and gender identity).

Have you reviewed your building/physical environment to consider how older people and those with disabilities can gain access?

Have you reviewed activities to ensure they are fit for purpose for diversity of people,

- Meet in alternative venues; refreshments offer a suitable level of choice
- different options for how people can communicate with the organisation
- Activities designed to be suitable for people with cognitive impairment; an assessment of the affordability of your activities for participants.
- Wheelchair ramps; hearing loops; accessible toilets; clear signage at readable height; well-lit entrances; glass doors are clearly marked; available seating in waiting areas; adaptations for people with cognitive impairment.

Equality Act

Anyone providing a service to the public, in any sector, whether the service is provided free or paid for is considered a duty holder under the Equality Act 2010.

Duty holders need to make reasonable adjustments where disabled customers (or employees) would otherwise be at a substantial disadvantage compared to non-disabled people. The Equality Act requires service providers to be proactive in identifying potential barriers to disabled people and to have a plan of action to reduce or eliminate these.

An access audit, undertaken by a suitably qualified person, such as a member of the National Register of Access Consultants, of the place from which a service is offered, is a means of identifying any potential physical barriers and will inform building owners and managers of the best way to minimise the risk of discrimination – it also makes good business sense.

- Adapt your documents to reflect this, e.g. your strategic plan, equality statement, or induction materials etc.
- Keep a log of changes made and any suggestions
- Log why some things are done and not others e.g. affordability, restrictions of physical environment etc.
- Review your activities to ensure they are fit for purpose for diversity of older people, and you have considered the factors below:
- E.g. meet in alternative venues; refreshments offer a suitable level of choice; different options for how people can communicate with the organisation; activities designed to be suitable for people with cognitive impairment; an assessment of the affordability of your activities for participants.
- Review your information for participants.
- Describe your considerations - why some things are done and not others e.g. affordability, lack of demand etc.
- Find examples of how you promote your organisation to excluded groups.

Checklist

Question	What to aim for	What you can do
<p>1. Do you ensure <u>your services/ activities are accessible, and inclusive</u> of older people from diverse backgrounds in your local area?</p>	<ul style="list-style-type: none"> • <i>Understanding profile & diversity of local population.</i> • <i>(E.g. age, gender and ethnicity, and disability, sexual orientation, religion and belief, and gender identity).</i> 	<ul style="list-style-type: none"> ✓ Adapt your documents to reflect this, e.g. your strategic plan, equality statement, or induction materials etc.
	<ul style="list-style-type: none"> • <i>Review your building/physical environment. Have you considered how older people and those with disabilities require below?</i> • <i>Wheelchair ramps; hearing loops; accessible toilets; clear signage at readable height; well-lit entrances; glass doors are clearly marked; available seating in waiting areas; adaptations for people with cognitive impairment.</i> • <i>Duty holders need to make <u>reasonable</u> adjustments where disabled customers (or employees) would otherwise be at a substantial disadvantage compared to non-disabled people.</i> • <i>The Equality Act requires service providers to be proactive in identifying potential barriers to disabled people and to have a plan of action to reduce or eliminate these.</i> • <i>An access audit,</i> 	<ul style="list-style-type: none"> ✓ Keep a log of changes made and any suggestions from visitors. ✓ Log why some things are done and not others e.g. affordability, restrictions of physical environment etc.
	<ul style="list-style-type: none"> • <i>Review your activities to ensure they are fit for purpose for diversity of people, and you have considered the factors below:</i> • <i>e.g./ meet in alternative venues; refreshments offer a suitable level of choice; different options for how people can communicate with the organisation; activities designed to be suitable for people with cognitive impairment; an assessment of the affordability of your activities for participants.</i> 	<ul style="list-style-type: none"> ✓ Review your information for participants. ✓ Describe your considerations - why some things are done and not others e.g. affordability, lack of demand etc. ✓ Find examples of how you promote your organisation to excluded groups.

HANDOUT 3. Organisation & Culture

Have you developed a culture which recognises diversity, tackles inequality and promotes equality in all areas of activity?

1. Have you created links with other local organisations / services that provide support to people from particularly excluded group?

2. Do you have an equality & diversity policy which covers all areas of your operations?

3. Is Equality & diversity is a topic within the induction of staff and volunteers?

Produce posters, signposting leaflets, referral process etc.

Produce/update a policy with evidence of its circulation to all trustees, staff & volunteers.

Look at interview questions /scripts / tests etc. and update to include equalities focus. Include Equality & Diversity policy in your induction pack /checklist; keep notes of training sessions where equalities are covered; team minutes etc.

Checklist

The following basic checklist can be used to assess how equality and diversity is adhered to within your organisation.

Question	What to aim for	What you can do
2. Have you developed a culture which recognises diversity, tackles inequality and promotes equality in all areas of activity?	<ul style="list-style-type: none"> • <i>Create links with other local organisations / services that provide support to people from particularly excluded group.</i> 	✓ Produce posters, signposting leaflets, referral process etc.
	<ul style="list-style-type: none"> • <i>An equality & diversity policy which covers all areas of your operations.</i> 	✓ Produce/update a policy with evidence of its circulation to all trustees, staff & volunteers.
	<ul style="list-style-type: none"> • <i>Review recruitment procedures and look at how equality & diversity are assessed in recruitment of staff/volunteers.</i> 	✓ Look at interview questions /scripts / tests etc. and update to include equalities focus.
	<ul style="list-style-type: none"> • <i>Equality & diversity is a topic within the induction of staff and volunteers.</i> 	✓ Include Equality & Diversity policy in your induction pack /checklist; keep notes of training sessions where equalities are covered; team minutes etc.

HANDOUT 4. Communications & Checklist

How do you promote the U3A within your local community to ensure the greatest reach?

1. Do you have an equal opportunities policy statement?
2. Communication methods that are fit for purpose for diversity of people, and that take into account the factors below: (E.g. written, spoken, large print, translated into other languages, signposting to other agencies).
3. Do you have a publicity/promotional materials that use an appropriate range of images of older people, representative of local population

Produce and make publicly available a statement that makes a commitment to equality & diversity.

Log communication methods that you use.

Your ability to describe your considerations - why some things are done and not others e.g. lack of demand

Keep examples of your promotional materials.

Look at images and ensure they represent local population.

Checklist

Question	What to aim for	What you can do
3. How do you promote the U3A within your local community to ensure the greatest reach?	<ul style="list-style-type: none"> • <i>An equal opportunities policy statement.</i> 	<ul style="list-style-type: none"> ✓ Produce and make publicly available a statement that makes a commitment to equality & diversity.
	<ul style="list-style-type: none"> • <i>Communication methods that are fit for purpose for diversity of people, and that take into account the factors below:</i> • <i>(E.g. written, spoken, large print, translated into other languages, signposting to other agencies).</i> 	<ul style="list-style-type: none"> ✓ Log communication methods that you use. ✓ Your ability to describe your considerations - why some things are done and not others e.g. lack of demand
	<ul style="list-style-type: none"> • <i>Publicity/promotional materials that use an appropriate range of images of older people, representative of local population.</i> 	<ul style="list-style-type: none"> ✓ Keep examples of your promotional materials. ✓ Look at images and ensure they represent local population.

HANDOUT 5. Resources - Where can I get more advice?

- I. Equality Act 2010 www.equalities.gov.uk
- II. Equality and Human Rights Commission – www.equalityhumanrights.com
- III. Government Equalities Office - www.homeoffice.gov.uk/equalities/equality-government
- IV. NCVO – Governance guides www.ncvo.org.uk
- V. Scottish Council for Voluntary Organisations - www.scvo.org.uk
- VI. Access to buildings and the equalities act: <http://www.building.co.uk/cpd-4-accessible-buildings-and-the-equality-act/5050478.article>
- VII. Equality and human rights in practice http://www.ageuk.org.uk/Documents/EN-GB/For-professionals/Equality-and-human-rights/Expert_Guide_Equalities_In_Services_pro.pdf?dtrk=true
- VIII. Diversity in older people and access to services – an evidence review http://www.ageuk.org.uk/Documents/EN-GB/For-professionals/Equality-and-human-rights/Equalities_Evidence_Review_Moriarty_2012.pdf?dtrk=true
- IX. An equalities checklist from Opening Doors London – Supporting Older Lesbian, Gay, Bisexual & Transgender People. <http://ageuklondonknowledgehub.org.uk/supporting-older-lgbt-people/>
- X. In relation to dementia: http://www.alzheimers.org.uk/site/scripts/documents_info.php?documentID=1674
- XI. Age UK London distributes an equalities bulletin with practical advice on meeting your equalities objectives. www.ageuklondon.org.uk

HANDOUT Six, (Large) Charity xxxx Equalities Policy

Date of Issue xxxx
Date of Last Review xxxx
Date of Next Review xxxxx

Equality, Diversity and Inclusion Policy

The Charity xxxx is a democratic membership organisation with charitable status that provides adults with educational opportunities to develop intellectual understanding, confidence and social and collective responsibility. From its inception in xxx the charity xxxxx has been committed to
XXXXXXXXXXXXXXXXXXXXXXXXXXXX Quote from Memorandum and Articles of Association

1. The Context

1.1 The xxxx has Memorandum and Articles of Association which commit the Association to take positive steps towards implementing equalities practices in all areas of its work.

1.2 The Association will meet all statutory obligations under relevant legislation (Equality Act 2010) and where appropriate, anticipate future legal requirements Signalled under xxxx directives and national legislation.

1.3 This policy is intended to underpin a range of explicit and detailed associated policies, protocols and procedures which together ensure the effective implementation and monitoring of Equalities measures within the organisation at all levels

1.4 The Equality Policy sets out our commitment to providing outstanding support and services to the diverse communities we serve through our strategic intent and operational plans.

1.5 The Equality policy operates within the context of the Equality Act 2010. The Act identifies nine 'protected characteristics, these are:

Age - Where this is referred to, it refers to a person belonging to a particular age (e.g. 65 year olds) or range of ages (e.g. 65-70 years)

Disability - A person has a disability if s/he has a physical or mental impairment which has a substantial and long-term adverse effect on that person's ability to carry out normal day-to-day activities.

Gender reassignment - The process of transitioning from one gender to another.

Marriage and civil partnership

Pregnancy and maternity - Pregnancy is the condition of being pregnant or expecting a baby. Maternity refers to the period after the birth, and is linked to maternity leave in the employment context. In the non-work context, protection against maternity discrimination is for 26 weeks after giving birth, and this includes treating a woman unfavourably because she is breastfeeding.

Race - Refers to the protected characteristic of Race. It refers to a group of people defined by their race, colour, and nationality (including citizenship) ethnic or national origins.

Religion and belief - Religion has the meaning usually given to it but belief includes religious and philosophical beliefs including lack of belief (e.g. Atheism). Generally, a

belief should affect your life choices or the way you live for it to be included in the definition.

Sex - A man or a woman.

Sexual orientation - Whether a person's sexual attraction is towards their own sex, the opposite sex or to both sexes

The following can be included if desired

Poverty In addition to our statutory duties the xxxx wishes to recognise that poverty and income inequality are also a key issue in our approach to Equality, Diversity and Inclusion. The xxxx also recognises that poverty can substantially contribute to the social exclusion of people with protected characteristics but can also affect the lives of individuals without any protected characteristics. The xxxx approach emphasises that issues of concern are both low income and the other factors relating to severe and chronic disadvantage, and that these are closely connected.

2. Legal Duties

Under the Equality Act 2010, we have three public duties we aim to meet as we work towards our mission:

2.1 Advance equality of opportunity

This is fundamental part of the xxxx's mission and values. The xxxx will work to ensure that every individual reaches their full potential regardless of their personal identity and/or characteristics or socio-economic status. The xxxx will make all reasonable adjustments to its provision, resources, access and publications to enable equal access for all individuals and groups.

2.2 Eliminate unlawful discrimination, harassment and victimisation

The xxxx operates a zero tolerance policy to discrimination. We perceive this to be a minimum standard that all staff, students, volunteers and members, partners and visitors will achieve. The xxxx will ensure that procedures for challenging all forms of bullying and discrimination, harassment and unacceptable behaviour are widely promoted.

2.3 Foster good relations

The xxxx will pro-actively promote equality, diversity and inclusion. It will ensure that students, volunteers, members and staff have an understanding and appreciation for the diversity and difference that goes to make up the society in which we live and work.

3. Terminology

3.1 Equality – enables everyone to participate and have opportunities to achieve their potential. In this way we help create a “fairer society”. An equalities approach recognises that our social identity can impact on life and educational experience.

3.2 Diversity- focuses on acknowledging and valuing the individual differences of our students, staff and volunteers and the ways in which these can enrich the association at all levels of the organisation.

3.3 Inclusion – is about everyone who is part of the xxxx; all students, staff, volunteers, members, partners and other stakeholders. It involves taking action to remove barriers to participation and learning. Inclusion also involves eliminating discrimination and promoting equality.

4. Policy Statement

4.1 Recognising that the lives of individuals are damaged by discrimination at all levels of society; the Association believes that education plays a major role in challenging discrimination and disadvantage.

4.2 The Association promotes full and lifelong access to education as necessary for the development of an open and democratic society.

4.3 The Association upholds the right of everyone to be treated with respect and dignity in an environment in which a diversity of backgrounds and experience is

4.4 The Association will strive to remove barriers to involvement at all levels and to encourage and celebrate diversity by enabling students to determine their own educational needs and priorities at a local level. The Association aspires to equality of opportunity and of outcomes for all.

4.5 No one involved with the work of the Association will receive less favourable treatment because of any of the protected characteristics listed above and in addition; parental status, HIV status, political belief or social or economic class.

4.6 The Association 'shall oppose discrimination in matters of all protected characteristics, and shall operate within an equal opportunities policy framework for the delivery of its education, for its employment practices, and for the organisation of its voluntary membership' -

5. Educational Provision

With regard to its provision the Association will;

- ✓ Implement 'Inclusive Learning' by paying particular attention to programme design and delivery to maximise the match between the needs of individual learners and the educational opportunities provided,
- ✓ Ensure good practice in teaching
- ✓ Support the development of effective student support services,
- ✓ Establish and maintain outreach provision in community venues and in workplace contexts in order to widen participation wherever possible,
- ✓ Develop programmes in response to expressed needs and demands in local
- ✓ communities from individuals and organisations,
- ✓ Ensure that Association strategic plans and Association and Regional operational plans include specific measurable targets to promote Equality and Diversity and Inclusion.

6. Voluntary Participation and Governance

The xxxx believes that democratic voluntary participation in its organisation and decision-making processes promotes mutuality, and builds the capacity of the organisation. The Association will therefore;

- ✓ Maintain organisational structures that place members at the heart of all decision making, particularly in the governance of the Association,
- ✓ Encourage full voluntary involvement at all levels of the Association, (Local,
- ✓ Regional and Association), and underpin that involvement with appropriate training and support
- ✓ Enable students to be directly involved in the development of their programmes through Branch and Regional committees and councils and arrangements with external partners,
- ✓ Actively seek involvement from underrepresented groups within the membership and governance structures of the Association at all levels.

7. Employment Practices

The xxxx is committed to ensuring that all staff and prospective staff are treated fairly and equitably on their relevant merits and abilities and within the requirements of their employment. The xxxx aims to actively encourage a climate of respect, dignity at work and value in all aspects of employment practice.

7.1 Employment Policies and Procedures

In order to ensure this the xxxx has a range of policies, procedures and commitments, which are reviewed on a regular basis. These include:

- _ Recruitment and Reference policy and procedures
- _ Staff Code of Conduct
- _ Capability and Disciplinary policy and procedures
- _ Grievance, Harassment and Bullying policy and procedures
- _ Performance management and Annual Staff Review policy and procedure
- _ Maternity, Paternity, Adoption and Personal, Family and Domestic Leave policy and procedures
- _ Annual Leave policy and procedures
- _ Induction policy and procedure
- _ Probation policy and procedure
- _ Flexible Working and Job Share policy and procedures
- _ Job Descriptions policy
- _ Managing Absence policy
- _ Job Security and Redundancy policy and procedures
- _ Leavers policy and procedures
- _ Health and Safety policy and procedures (including Stress Management)
- _ Safeguarding policy and procedures
- _ Staff Development and Training policy and procedure
- _ Whistleblowing policy and procedure

7.2 Implementation

Principles and policies are of limited value unless steps are taken to apply them; thereby ensuring that Equalities measures are embedded in the practice of the organisation at all levels. Accordingly;

7.2.1 This Policy Statement will be implemented through the actions set out in the Equality Action Plan and will inform the Association's Strategic Plan and Association and Regional Operational Plans.

7.2.2 Appropriate training and support for employees and members and other volunteers will support the implementation of the Policy where necessary.

7.2.3 The Policy will be subject to annual monitoring and review by the Equality and Diversity Scrutiny Panel, and agreed by Management Team and Trustees.

8. Location of Responsibility

The responsibility for equality, diversity and inclusion lies with everyone. The xxxx will ensure that staff, tutors, volunteers, members and students are made aware of the policy and understand their personal responsibilities as well as the Association's

collective approaches to promoting Equality Diversity and Inclusion and its commitment to Inclusive Learning

9. Governance

Ultimate responsibility for the implementation of the Equality and Diversity measures lies with the Trustees of the Association. It is their role to oversee senior management through performance management systems. The Equality and Diversity Scrutiny Panel (EDSP) monitors and reviews Equality and Diversity measures on behalf of the Trustees.

10. Management

The Association Management Team will be the key management level for ensuring the policy informs practice at Association level. The Association Management Team is supported in this by the national Strategic Lead for Equality and Diversity. The Equality, Diversity and Inclusion Champions Network (EDICN) will actively share best practice in Equality, Diversity and Inclusion across the Association.. At Regional level responsibility for the implementation of Equality and Diversity measures rest with xxxx.

Responsibilities of Individual Staff

In order to ensure that the Equality and Diversity Policy is put into practice individual members of staff should:

- ✓ Seek actively to promote equality, diversity and inclusion in all areas of their work.
- ✓ Respond to individual needs of those they work with (including members, other staff, volunteers etc.)
- ✓ Foster an environment in which compliance with this policy is regarded as integral to their work
- ✓ Work to tackle and effectively eliminate bullying, harassment and discrimination.
- ✓ Not victimise any person who has complained, including complaints of harassment or unfair discrimination, or who has given information in connection with such a complaint.

Responsibilities of students and volunteers

All learners and volunteers are responsible for adhering to the Code of Conduct and treating others with courtesy and respect.

11. Monitoring and Review

All Self-Assessment Reports must include;

- ✓ What equality arrangements have been made during the previous year,
- ✓ How effective the equality arrangements were,
- ✓ Specific equality and diversity measures for the subsequent action plans.
- ✓ Data on participation levels for all areas of the Associations activity will be available and compared on an annual basis with National statistics.

HANDOUT Seven - Local U3As

Model Equality and Diversity policy

Statement

Xxxx U3A is committed to providing, life-enhancing and life-changing opportunities where retired and semi-retired people come together and learn together, not for qualifications but for its own reward: the sheer joy of discovery! Members share their skills and life experiences: the learners teach and the teachers learn, and there is no distinction between them. xxxxxU3A recognise that some people are particularly likely to experience discrimination and harassment and are committed to making sure our group is as inclusive and welcoming as possible.

“xxx U3A is committed to treating all people equally and with respect irrespective of their age, disability, gender reassignment, marriage or civil partnership, pregnancy or maternity, race, religion or belief, sex, or sexual orientation. We aim to design our activities, services and decision making processes specifically to encourage and support participation from people who face disadvantage in society”.

Aims of Policy

Xxx U3A considers that no member should suffer disadvantage, or receive less favourable treatment on the basis of:

- ethnic origin, nationality (or statelessness) or race
- disability
- religion or belief (including the absence of belief)
- marital or civil partnership status
- sexual orientation
- pregnancy
- gender reassignment
- class or socio-economic status
- political belief.

Practical Approaches to Inclusion

Xxx U3A is open to xxx.

xxxU3A will make sure all new members are aware of our Equalities policy and xxx U3A Code of Conduct. U3A will take reasonable measures and practical approaches to ensure a wide range of people take part in our activities and meetings. This may include:

- Consideration of the time of day of meetings
- Consideration of venues for meetings including:
 - Accessible to wheelchair users
 - Access to PA system and a hearing loop
- Publicity
 - Making it easy to read
 - Available to people who don't have access to the internet

- Range of images used that reflect the local community
- Tasks and Roles
 - To make sure a range of people get their voices heard For example encouraging more women to take on roles such as chairing meetings

Code of Conduct

xxxU3A has a Code of Conduct. Sexist, racist, homophobic, transphobic or otherwise offensive and inflammatory remarks and behaviour are not acceptable. These constitute harassment, and have no place in xxx U3A

If any member of xxx U3A feels they have been discriminated against by the xxxx U3A or harassed at an xxx U3A event they should raise this with the committee. The committee will investigate the complaint, listening to all members involved. (If the complaint is against a committee member, that member will not be part of conducting the investigation).

If the complaint is against a particular individual, this person will have the opportunity to express their point of view, accompanied by a friend. The person making the complaint will also have this opportunity.

If the complaint is against xx U3A as a whole, the Committee must work to ensure that such discrimination is not repeated in the future, and must inform the members of how they propose to do this.

Any decision to exclude a person from the organisation due to discriminatory or harassing behaviour will be made with reference to xxx U3A's constitution/ rules. The Association will support people who feel they have been harassed or discriminated against, and will not victimise or treat them less well because they have raised this.

Reviewing your policy

This policy will be reviewed every ... years.”

This policy was adopted at a meeting of xxx U3A on xxx, and will be reviewed at least every 2 years.