Equality, Diversity and Inclusion Review update report

09/12/2022

See all updates

In this report we summarise – for each of our four EDI workstreams – our progress during 2021–2021 and our ambitions for the rest of 2022–2023.

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Equality, diversity and inclusion

Foreword

By **Maria Adebowale-Schwarte**, Chair of the Equality, Diversity and Inclusion Review Task Force and Trustee at The National Lottery Heritage Fund.

This report summarises our main achievements and progress in each of our equality, diversity and inclusion (EDI) workstreams – investment, governance, culture and workforce – during the past 12 months. It also sets out some of our aims and ambitions for the coming year.

The Heritage Fund made encouraging headway with our EDI objectives in 2021–2022, despite a challenging background as the UK, and the world, recovered from the pandemic and faced ongoing economic and political uncertainty.

Of particular importance to us this year was the completion of our two-year programme of research, which is helping us better understand how we can become a more inclusive and equitable funder. The research focuses on groups currently and historically under-served by our funding. We gained valuable insight into how these organisations perceive heritage, identified some gaps in understanding and gained more awareness of the needs and expectations of these groups.

The research resulted in seven key findings and 10 recommendations grouped into four areas:

- perceptions of heritage
- inclusive practice
- accessing support needs
- understanding inclusion

These recommendations are already informing the development of our new 10-year strategy, which is due to be introduced in 2023.

Inclusion is identified as one of the new strategy's key priorities. Through the strategy development process, we have engaged with a wide range of stakeholders – including running workshops and focus groups with under-served groups –

to gather the widest range of opinions and insights into how the Heritage Fund can be more inclusive.

We will also continue to listen to, consult and work with our staff, grantees and applicants (potential and unsuccessful) to achieve greater equality, diversity and inclusion within the Heritage Fund itself – in our grant giving and our work across the heritage sector.

We will also continue to collaborate with external organisations which offer opportunities to people from diverse ethnic communities and/or disadvantaged groups and can enhance the diversity of the Heritage Fund's reach and the heritage sector more generally.

Internally, we will continue to build on the EDI actions already delivered and introduce more actions at corporate level during the coming months. Alongside this, there will be a focus on local teams exploring local actions to improve EDI in their areas. We hope this will encourage a two-way flow of information where important actions and learning are shared across all areas and levels of the organisation.

Our EDI Task Force has been invaluable in supporting and guiding our work during the past two years. I would like to thank all the members for their expert contributions and for having kindly committed to supporting the Heritage Fund for this additional year to drive forward implementation of some of our key actions.

Although the Task Force will conclude its work at the end of 2022, I am delighted to say that members of the group will continue to advise and bring their specific expertise to areas of the Heritage Fund's EDI work during 2023.

I very much look forward to sharing the next stage of the Heritage Fund's work towards becoming a more inclusive, diverse and equitable organisation.

Background

In the summer of 2020 we launched a wide-ranging review of the Heritage Fund's approach to diversity and inclusion.

The Review included wide consultation – both internal and external – and resulted in the creation of four workstreams to help us deliver progress on the Review's findings.

A year on from our initial progress update, we're pleased to share how we've continued to work towards our ambitious vision of inclusive heritage.

Our EDI progress 2021–2022

Investment

Objective

We want all our funding to contribute to a society where everyone can take part in and benefit from heritage. We will support, monitor and hold accountable our grantees in the delivery of our inclusion outcome.

Progress

We:

- Commissioned a second round of external research to better understand how we can be a more inclusive and equitable funder, focusing on groups currently and historically under-served by our funding. We gained valuable understanding of how these organisations perceive heritage that will help us focus and plan our future activities.
- Developed an ongoing audit of our external communications and marketing materials to ensure our language, images, channels and processes are inclusive and accessible. Results have included:
    - creating a new page setting out the application process in a clear, step-by-step way
    - updating the Our work webpage to clarify what we do and highlight our current priorities
    - regularly updating our internal style guide to ensure our communications reflect the current, most inclusive and representative language
    - Plain English training for the Marketing and Communications team to ensure the words used by the Heritage Fund are clear and straightforward
- Continued to encourage and support projects led by and/or exploring the heritage of under-served communities throughout the application process. Some of those projects we funded include:
    - A Legacy of Kindness: Telling the Story of The Gender Identity
    - West Horsley Place: An historic estate without barriers
    - The Roma of Newport, South Wales
- Established an EDI Register of Support Services (RoSS) working group to procure a more inclusive, diverse and representative set of digital heritage RoSS consultants in 2022. We trialled a range of activities to encourage and increase engagement. Learnings from the trial are being fed into the 2023 re-procurement of the main RoSS framework, which provides a greater opportunity to broaden diverse representation.
- Developed and are currently testing technology to enable continuous monitoring of EDI metrics – especially from under-served groups – from initial project enquiry through to grant award. This will help us to monitor, encourage and increase applications from under-served groups, leading to more successful applications.
- Introduced changes to our new investment management service, Get funding for a heritage project, based on user feedback to ensure it remains user-friendly and accessible. This development is an ongoing process and support requests from applicants are reviewed regularly alongside targeted research with a user panel.
- Invested in partnerships that help us play our part in increasing diversity within the heritage sector, better reflecting and representing the diversity of the communities we serve, including:
    - Nextdoor Nature, a £5m partnership with The Wildlife Trusts to empower people in economically deprived urban and rural areas to bring nature to their communities
    - New to Nature, a £2m partnership with Groundwork UK to help young people from disadvantaged backgrounds into work placements in nature and landscape organisations

Governance

Objective

We want to ensure the principles of diversity, equality and inclusion are incorporated in our decision making. We will do this by building a group and pipeline of decision makers representative of the diversity of the UK public. We will also ensure our decision makers are equipped with the necessary skills and information required to achieve our goals around inclusion and continue to remain open and transparent about our work in this area.

Progress

We:

- Introduced exit interviews for departing trustees and refreshed trustee appraisals to provide more opportunities to consider the Heritage Fund's culture from other perspectives and identify ways in which it can be made more inclusive.
- Sought to recruit new Board and committee members who more accurately reflect the communities the Heritage Fund serves. We were explicit in wanting to hear from:
    - young people
    - people from diverse ethnic communities
    - people who identify as disabled or with long-term health conditions
    - people who identify as LGBTQ+
    - people from lower socio-economic backgrounds

The following tables show the diversity of our Board and committees as of August 2022:

Age range	**Total**
18 to 24	0%
25 to 34	3%
35 to 44	9%
45 to 54	24%
55 to 64	24%
65 to 74	33%
75+	7%

Gender	**Total**
Male	52%
Female	48%

Disability	**Total**
Yes	3%
No	97%

	Ethnic origin	**Total**
White		38%
Ethnically diverse communities		10%
Not disclosed		52%

Culture

Objective

Our culture will be one where we appreciate the richness inclusion brings, champion the interests of all and actively challenge exclusion. We will embed our inclusive value and underpinning behaviours across the business.

Progress

We:

- Helped to embed culture in the Heritage Fund by recruiting a new Workforce Equality and Culture Lead in our HR team to provide dedicated leadership. We also strengthened our network of Culture Champions with additional resources and guidance, supporting them to manage a two-way flow of information – updates, feedback, ideas and good practice – between local teams and HR and the Executive.
- Established staff networks – creating safe spaces to discuss work and life experiences – supported by Executive sponsors and with agreed terms of reference, related to:
    - disability
    - gender
    - intersectionality
    - neurodivergence
    - race
    - sexual orientation
- Had invaluable input from the staff networks on projects and updates including:
    - the development of our reasonable adjustments guidance
    - revising language in our brand guidelines and across our data collection tools
    - internal and external communications around awareness events such as LGBT History Month, Black History Month, etc
    - initiating the use of pronouns in email signatures
- Delivered our 'Exchange–Explore–Reflect' programme of interactive staff sessions discussing race and heritage, led by our RoSS consultant Jenny Williams. These sessions were attended by 30% of colleagues, including some committee members.
- Introduced a bi-annual employee engagement survey to monitor and measure staff wellbeing and satisfaction and to identify any issues, such as discrimination. We are using the results to guide actions to further support our staff.
- Continued to embed our values across our workforce, via our behaviours framework, helping us become a more flexible, receptive organisation, able to hold honest and sometimes challenging conversations.

Workforce

Objective

We want to build a valued and diverse community of staff, more reflective of the diversity of the UK public. By advancing equality of opportunity and diversity in all aspects of employment, we will enhance the effectiveness and flexibility of our workforce.

Progress

We:

- Commissioned a report into the diversity of our workforce, looking across the organisation and at each directorate. We identified improvements in representation of ethnicity, sexual orientation and disability.
- Analysed recruitment trends, benchmarked against other organisations and identified areas where we need to explore positive action to improve diversity in recruitment.

The following table show the diversity of Heritage Fund staff over the past five years:

Characteristic	2017–2018	2018–2019	2019–2020	2020–2021	2021–2022
Gender (percentage of women)	75%	74%	74%	76%	74%
Ethnicity (percentage of people from ethnically diverse communities)	11%	12%	10%	10%	12%
Disability (percentage of people with a disability)	4%	4%	9%	8%	13%
Sexual orientation (percentage of people identifying as LGBTQ+)	2%	3%	6%	6%	9%

- Introduced a new recruitment framework and policy to drive improvements in individual and organisational performance. It puts our values and behaviours on an equal footing with skills, knowledge and experience to break down barriers for applicants from communities currently under-served in our workforce. We also launched a new recruitment system and programme of recruitment and interview training. These new initiatives have included anonymous recruitment, diverse panels, no academic qualifications required and the importance of exploring diversity and considering positive action.
- Extended our partnership with the Windsor Fellowship scheme to appoint young trainees from diverse ethnic communities on paid 12-month placements. They've had opportunities to shadow our Chief Executive and Board members and work on key projects, including the development of our Racial equity in nature toolkit. One participant in this scheme has taken up a full-time role at the Heritage Fund.
- Created a new Assistant Workforce Development Manager post to support management and career development (particularly for groups under-served in our workforce), talent management and EDI training.
- Launched new hybrid working arrangements, including a revised policy on championing workforce flexibility, which supports the business and the diverse personal needs of our people.
- Continued our programme of policy review and redesign, launching new policies and guidance on:
    - dignity and respect at work
    - equality and diversity
    - discipline and capability
    - sickness absence, including clarification of support for people with disabilities and long-term health conditions

Our workstream actions for 2022–2023

Investment

We aim to:

- Implement the recommendations from our EDI research in our new 10-year strategy and plans for the future. This will include refining the Heritage Fund's overall approach to inclusion monitoring with improved guidance and support for grant applicants.
- Establish mentoring and networking opportunities with our RoSS consultants to help prospective grant applicants who have no experience of writing applications. Information from our EDI research will play a key role in this work.
- Review other funders' approach to EDI to learn from them, using this knowledge to inform changes to our own ways of working.
- Build on our existing work supporting projects led by and/or exploring the heritage of under-served communities throughout the application process.

Governance

We aim to:

- Put in place a detailed EDI training plan for trustees and committee members.
- Demonstrate transparent and public leadership on EDI by producing an annual EDI progress report for our Board. We will also share this report with our stakeholders and publish it on our website.
- Strengthen our monitoring and reporting on governance diversity data to help us address the areas where we're underperforming against our ambitions.

Culture

We aim to:

- Further strengthen our staff networks so they can continue to provide safe spaces for discussions, support colleagues and give advice on diversity, inclusion and related activities as appropriate. We will commit more funding to support the networks and provide more opportunities for them to work with HR on activities and plans.
- Provide more opportunities for staff to engage with and explore different aspects of diversity, both as they relate to the heritage sector and more widely in society.
- Establish a staff EDI coordination group as part of the delivery of a new people strategy. The new Workforce Equality and Culture Lead will lead this.
- Revise and refocus the role of the Culture Champions, with emphasis on practical actions and improving the flow of ideas and best practice across the Heritage Fund.
- Introduce new, and maintain ongoing, EDI training and awareness, including webinars from external contributors to share best practice and/or lived experiences.

Workforce

We aim to:

- Launch a new people strategy, setting out our vision for the next three years, with EDI embedded throughout our core goals of:

    - leadership and management development
    - ensuring the Heritage Fund is a great place to work
    - building skills and capabilities
    - improving performance management
- Design and introduce training and support to enable our line managers and staff to identify and achieve meaningful inclusion behaviour objectives.
- Continue our programme of policy review and redesign, launching new policies and guidance in 2023 on:
    - special leave, including explicit new paid provision for domestic violence, carer's leave, fertility treatment, neonatal leave and more
    - maternity, including enhanced pay entitlement
    - paternity, including enhanced pay entitlement
    - probation
    - adoption
    - parental leave
    - shared parental leave, including enhanced pay entitlement
- Continue to improve systems for recording equality impact assessments, alongside training and educating our people to better conduct these assessments.
- Create a new post of Recruitment Manager to oversee and improve how we coordinate, plan and undertake recruitment activity. A key focus for this role will include supporting local teams to explore opportunities for positive action to increase recruitment diversity in their areas.
- Continue to invest in positive action initiatives to overcome potential barriers to entry into work in the heritage sector, including continuing placements for Windsor Fellows, Leonard Cheshire's Change 100 interns and young people applying to the 2027 and Corra projects.