Equality, Diversity and Inclusion Review report

09/08/2021

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In this report we summarise – for each of the four workstreams – what we learned over the past 12 months, what we have already achieved, and set out key actions we will take throughout 2021-2022.

Attachment	Size
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Equality, diversity and inclusion

Foreword

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

Ensuring everyone in the UK has opportunities to explore, access and enjoy heritage has been at the heart of The National Lottery Heritage Fund's mission since we were established in 1994. When we launched our latest Strategic Funding Framework in 2019, we made that mission even more explicit. We believe everyone should be able to benefit from our funding, regardless of age, sex, disability, race, sexual orientation, gender identity, faith, class or income.

Inclusion – 'involving a wider range of people' – is a mandatory outcome of all the projects we fund. But a funding outcome alone is not enough. We recognise that we need to do more to achieve equality, diversity and inclusion (EDI) in all aspects of our organisation and its work. In June 2020 we committed to a wide-ranging review of our current approach to EDI. Our aim was to identify ways to accelerate and drive greater change within The Heritage Fund and across the heritage sector.

I was delighted to be asked to chair The Heritage Fund's independent Task Force to oversee the review, alongside a panel of eight other experts.

We focused on implementing an honest assessment of The Heritage Fund's current activities and performance. We looked for examples of best practice and identified areas where our future energy and attention needs to focus.

Along the way we found a lot of positives. There was a real enthusiasm for and commitment to achieving a more equitable organisation, from our applicants and funding partners, and from our staff. We were also heartened to see the breadth and depth of EDI work that was already taking place in parallel to the Review.

However, we also found that barriers to true equality, diversity and inclusion exist within many of our practices and processes. This deters applicants, partners and sometimes even our own employees, from fully engaging with us. The Review has identified those barriers and we now have clear actions to address them.

We recognise that some of the changes we propose will take time to implement, and their impact will not be apparent immediately. To ensure impetus is not lost, the Task Force will remain in place for another year. We will continue to provide support, guidance and challenge, and report progress to the Board.

I would like to thank the members of the Task Force, Andrew White and the many Heritage Fund colleagues for their commitment to and investment in this crucial work. I am excited to be part of the next stage of this journey, as the Review's actions are delivered. I look forward to seeing the difference it will make to The Heritage Fund and across the heritage sector.

Background to our Equality, Diversity and Inclusion Review

The Review was led by Andrew White, Director of The National Lottery Heritage Fund in Wales, and overseen by an independent Task Force. Its aim was to define an ambitious vision of inclusive heritage to guide The Heritage Fund's operational and grant giving activities.

When we talk about inclusion, we mean equal and fair access for everyone, regardless of age, sex, disability, race, sexual orientation, gender identity, faith, class or income.

We drew on the knowledge and experience of our valued partners, grantees and prospective applicants, staff and trade unions, to examine all aspects of our EDI activities across four workstreams:

- investment
- governance
- culture
- workforce

The first phase of the Review drew on internal expertise and evidence. Through staff working groups we were able to gain greater understanding of our various EDI activities past and present, share ideas and discuss future ambitions.

The second phase – informed by the findings of the first phase – involved greater external input. We conducted a survey of our Register of Support Services (RoSS) consultants, commissioned independent researchers from The Social Investment Consultancy to engage with under-represented groups and explored examples of best practice from the heritage sector and beyond.

We looked at our processes and policies to identify EDI gaps and reviewed existing EDI strategies and workplans to test the ambition of these approaches. One-to-one consultation, data gathering, focus groups and surveys all fed into the Review and helped us gain a better understanding of our activities and identify areas for improvement.

In this report we summarise – for each of the four workstreams – what we learned over the past 12 months, what we have already achieved, and set out key actions we will take throughout 2021-2022.

Workstream objectives, findings and progress

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 mandatory inclusion outcome.

Findings and progress

Although welcomed by many, our mandatory inclusion outcome can be perceived as difficult to comply with for projects aiming to engage with under-represented groups and communities. Our definition of 'inclusive projects' is seen by some as too narrow:

- We are undertaking a re-evaluation of our mandatory inclusion outcome to make it more accessible and relevant to projects run by and/or exploring the heritage of under-represented groups.
- We are exploring new requirements for larger projects/organisations to improve the inclusivity of their projects and governance.
- We are supporting our investment staff through new training to help them better assess the inclusion outcome at funding application and monitoring stages.

There is limited diversity across protected characteristics among our RoSS consultants, as well as limited EDI experience:

- We are using data from the survey of RoSS consultants to inform the procurement of a more diverse set of new digital heritage RoSS consultants in 2021-2022. This exercise will inform the re-procurement of our wider RoSS Framework in 2022-2023.

Research into how we develop a new, more accessible, funding system – our Investment Management System (IMS) – was wide-ranging and diverse, and aimed to ensure no one is excluded from using the system:

- Following the phased launch of the IMS during the spring and summer of 2021, we have retained the user research panel to ensure further developments remain user-friendly and accessible.

We need to improve how we collect data about access to heritage, the organisations we support and our own workforce:

- We are committed to improving the collection of anonymised diversity data and building our data capture processes to support more accurate, secure and reliable equality data reporting. We are also looking to address the issues around data collection related to participation and community outreach.

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.

Findings and progress

The diversity of our Board and committees does not fully reflect the communities we serve:

- We piloted a new approach to recruitment in the North of England, proactively promoting the opportunities to organisations working in more diverse heritage spaces and, as a result, appointed three new members.
- We are using the ideas and learning from the successful North of England pilot to improve current recruitment campaigns and increase the diversity as well as the skills of our Board and committees.
- We will strengthen our monitoring and reporting of governance diversity data to be included in an annual EDI progress report to Board.

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.

Findings and progress

Our values – inclusive, ambitious, collaborative and trusted – are intrinsic to The Heritage Fund's development:

- Our new Behaviours Framework, launched this summer, will help embed our values across our workforce, helping us become a more flexible and receptive organisation, able to hold honest and sometimes challenging conversations.

There are high levels of staff engagement with our Culture Programme, through behaviours workshops, surveys and a peer to peer 'thank you' scheme:

- We are prioritising and strengthening the development of our Culture Champions network with additional resources and guidance.

There is widespread enthusiasm from our staff to learn more widely from each other and share ideas:

- We have introduced supportive staff networks related to a range of protected characteristics.
- We have introduced more detailed and bespoke EDI training, including anti-racism training, and knowledge sessions around areas such as supporting transitioning, the menopause, and people of faith in the workplace.

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.

Findings and progress

Our workforce is not as diverse as the UK working population and we have under-represented staff groups:

- In April 2021 we launched a new Recruitment Framework and Policy that puts our values and behaviours on an equal footing with skills, knowledge and experience, to break down barriers for applicants from under-represented backgrounds.
- In conjunction with the Windsor Fellowship, we have appointed four trainees from Black, Asian and minority ethnic backgrounds on paid, 12-month placements.
- We are reviewing key HR procedures including career development for staff from diverse communities and policies on workforce diversity, dispute and resolution, and dignity at work.
- Two interns joined us for the summer 2021, as part of Leonard Cheshire's Change 100 programme of paid work placements. It matches talented students/recent graduates with any disability or long-term condition with progressive employers.

Workstream actions

Investment

Actions for 2021-2022:

- audit our external communications and marketing materials to ensure our language, channels and processes are accessible
- review other funders' approach to EDI to inform changes to our current ways of working
- establish mentoring and networking opportunities with our RoSS consultants to help prospective applicants who have no experience of writing applications
- continue our work supporting projects led by and/or exploring the heritage of under-represented communities, such as Black, Asian and minority ethnic, LGBT+, disabled and working class communities, throughout the application process

Governance

Actions for 2021-2022:

- strengthen monitoring and reporting on governance diversity data
- demonstrate transparent and public leadership on EDI by introducing an annual EDI progress report to the Board, which will be further disseminated to our stakeholders and the public
- develop more opportunities for buddying, mentoring, EDI learning and development to support new Board and committee members
- diversify our decision making by involving young people through programmes such as Kick the Dust in advisory roles and in supporting national and local EDI decisions
- put in place a detailed EDI training plan for Trustees
- introduce exit interviews for departing Trustees and refresh Trustee appraisals to provide more opportunities to consider The Heritage Fund's culture from other perspectives
- explore the use of recruitment agencies with experience in recruiting people from diverse backgrounds
- raise awareness and accountability of our duties under the relevant laws of the constituent parts of the UK, such as the Public Sector Equality Duty

Culture

Actions for 2021-2022:

- identify measures of staff wellbeing and satisfaction and monitor these through regular ‘check-in’ surveys
- work with a range of people and organisations to understand and agree the most inclusive and representative language
- deliver an ‘Exchange-Explore-Reflect’ programme of interactive staff sessions discussing race and heritage
- continue to build our supportive staff networks related to intersectionality, LGBT+, race, gender, disability and neurodivergence

Workforce

Actions for 2021-2022:

- Introduce a new Performance Management Framework to embed our new Behaviours Framework and support the development of a performance culture. All staff will be assessed against performance objectives and against behaviours with a key emphasis on inclusion and diversity.
- More prominently publish key data relating to the diversity of our staff and membership of our governance bodies.

The way forward

Our EDI Review identifies clear areas for us to build on as part of our ambition to achieve greater equality, diversity and inclusion within The Heritage Fund, in our grant giving, and across the heritage sector. It also highlights areas where we need to reflect or challenge more, including some long-term issues that will take time to address.

It is important that we take the time to do things thoroughly, effectively and collaboratively. So, we are:

- retaining the independent Task Force and providing it with quarterly updates to oversee progress and suggest further focus
- coordinating an annual report to the Board on the implementation of our EDI actions, which will also be shared with our stakeholders and the public
- establishing a staff EDI Coordination Group to steer the delivery of the Review’s actions and outcomes
- recruiting an EDI Project Manager to help keep our progress on track

The EDI Review has shown that there is still much to do before we achieve our ambitions, both for ourselves and the sector.

We believe that through making our funding criteria around inclusion both broader and more comprehensive, improving our data collection and analysis, and recruiting more diverse funding decision-makers, we can support more heritage from under-represented groups to be explored and made accessible to all.

Diverse workforces are proven to be more effective, and by diversifying our workforce and putting values and behaviours at the heart of our recruitment and performance management, we will foster a cohort of heritage professionals who will have a positive influence within and beyond The Heritage Fund.

And, as the UK’s largest dedicated funder of heritage, we hope our visible commitment to EDI and our actions to progress in these areas, will inspire others to do the same, contributing to a more equal, diverse, and inclusive heritage sector and society.

Our research and evaluation

We regularly conduct research to discover what is happening in the heritage sector, and we evaluate our work to better understand the change we are making. Read more of our insight.