



Equality Statement - Policy checklist

This checklist should be used alongside the NEU's model policy on equality to help you negotiate a policy acceptable to the union. Non-negotiable points (ie those required by law or union policy) are highlighted in red. You may not be able to secure everything on this checklist – if that is the case, you will need to consult members on whether the proposed policy is sufficiently positive to be acceptable.

Part 1

The NEU preference is for an employer to adopt a concise equality statement, which has been consulted upon with the wider school/college/academy community (including governors, parents and pupils) and discussed in a staff meeting or as part of a training day. It should incorporate a whole school/college approach to equality throughout all of its policies and procedures. Part 1 of this checklist addresses such equality statements. This approach ensures there is an overarching commitment to equality from the employer, while mainstreaming equality issues into all other employment and school policies.

Equality policy statement

Is there a clear introductory statement setting out the employer's commitment to promoting equality throughout the workplace and in all policies and procedures?

Is there a clear commitment by the employer to prohibit and prevent discrimination and harassment against staff and the wider school/college community (pupils/students, job applicants, governors and parents)?

Protected characteristics

Is there a list of the protected characteristics (age, disability, gender reassignment, marriage or civil partnership, pregnancy or maternity, race, religion or belief, sex and sexual orientation) and a clear statement that discrimination in relation to one or more of these characteristics is prohibited?

Public sector equality duty

Is there a commitment that the employer will meet their public sector equality duty, which requires them to give due regard to:

- the need to eliminate discrimination
- advance equality of opportunity
- foster good relations between different groups?

Complaints grievance procedure

Does the policy explain how an employee can raise a complaint on the grounds of discrimination or another equality-related issue?

Diversity in the workforce

Is there a commitment to promote and/or maintain a diverse workforce, and will positive steps be taken to facilitate this? This could include making job application forms available in a variety of formats, and asking recruitment agencies to draw applicants from a diverse pool of workers.

Monitoring

Is the equality monitoring of policies and procedures undertaken annually or, at the very least, biennially?

Will the results of equality monitoring be shared with the recognised trade unions?

New and existing policies and practices

Will the recognised trade unions be consulted on any procedures to assess the impact of new and existing policies and practices on different groups?

Part 2

While it is not the preferred approach, the NEU acknowledges that some employers may wish to continue detailing their equality commitments on each specific area in one overall equality/equal opportunities policy. Such a document would need to be much more detailed than a policy statement and employers will need to ensure that it is considered in conjunction with their other policies so that equality issues are addressed. Part 2 of this checklist addresses the items we would expect to see in such a document.

Equality/equal opportunities policy

Aims/objectives

Is there a commitment from the employer to meet their public sector equality duty to eliminate discrimination, advance equality of opportunity and promote good relations between different groups?

Is there a commitment to do more than just meet the public sector equality duty and to make the workplace environment not only accessible for all its users according to the law, but also as welcoming as possible?

Is there a commitment to attain a workforce which is representative of the area in which the school/college/academy is situated?

Is there a commitment to create an environment in which individual differences and the contributions of all staff are recognised and valued?

Is unlawful discrimination of job applicants prohibited and is there a commitment to protect applicants for work from unlawful discrimination and harassment?

Is unlawful discrimination and harassment of pupils or students prohibited, and is there a commitment to protect pupils or students seeking admission to the school or college from unlawful discrimination and harassment?

Is unlawful discrimination and harassment of workers and pupils/students prohibited, and is there a commitment to protect pupils/students, staff, from unlawful discrimination and harassment?

Will training, development and progression opportunities be available to all staff?

Legal framework

Is the Equality Act 2010 cited as the main legal framework under which the policy operates?

Definitions

Are there definitions of the behaviours which are unlawful under The Equality Act?

- Is there a definition of direct discrimination? This is when someone is treated less favourably than another person because of a protected characteristic. This can also be through perception or association.
- Is there a definition of indirect discrimination? This is when an organisation's practices, policies or procedures which apply to everyone, have the effect of disadvantaging people who share one or more protected characteristic.
- Is there a definition of harassment? This is unwanted conduct related to a relevant protected characteristic, which has the purpose or effect of violating an individual's dignity or creating an intimidating, hostile, degrading, humiliating or offensive environment for that individual.
- Is there a definition of victimisation? This is when an individual is treated less favourably because they have made or supported a complaint under the Equality Act, or because they have been suspected of doing so.

Responsibility for overseeing the policy

Is it clear who has overall responsibility for ensuring the policy is followed?

Recruitment and selection

Is there a commitment to undertake positive action if any groups are under-represented in the workforce?

Is it clear that job applicants will not be asked about their health and/or disability before a job offer is made, in accordance with section 60 of the Equality Act 2010?

Equality monitoring

Are all job applicants asked to complete a confidential equality monitoring form?

Are these forms kept separate from the job application, and not provided to the staff members undertaking the recruitment selection?

Is the information gathered in equality monitoring forms used to review the recruitment process and ascertain if any positive action is required?

Training

Is there a commitment to provide regular equality training to all staff members and other relevant individuals, such as governors?

Is this training part of the induction process for new members of staff or new governors?

Review

Is it stated that the policy will be reviewed annually or biennially and consulted on with the recognised trade unions?

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