

Appendix 1

Ref.	Summary of action	Team	Lead officer	Timetable	Notes on progress
1.1	Identify new resources dedicated to taking forward this work	CMT	CMT	Mar-24	Jamie Hooper now in post
1.2	Appoint Corporate Management Team lead for EDI	CMT	SP	Mar-24	Alison Hatcher
6.10	Ensure that EDI is fully reflected in new W&F social value statement and future implementation	Commissioning and procurement	SS	Mar-24	"Equity - ensuring that procurement process highlights and drives out in any inequalities, especially those resulting from poverty and rural sparsity. We will focus on the wider determinants that drive those inequalities in a way that is fair and equitable."
1.3	Develop annual EDI work timetable for W&F policy team to oversee	Policy	JH	24-May	Phase one action plan agreed up to March 2025, phase two to be planned and agreed.
1.5	Develop roles and responsibility outline for W&F	Policy	JH	24-May	Ellie Greenwood developed R&R outline
9.1	Work with democratic services and HROD to develop member resource pack on EDI, including local data, W&F guidance, signposting to useful resources	Policy	JH	24-May	23/09/24 EDI Resource pack now available on Members Information Portal. Portfolio holder making at statement at Council 26 September and follow up Member Briefing scheduled for 7th November [Insert link to resource pack on member's site]
3.5	Policy and communications team to develop EDI comms approach with planned ongoing comms related to EDI	Policy	JH	24-Jun	Linked to point 3.4 - JH working with GH on EDI annual calendar - to discuss with Luci Robb
6.5	Promote a consistent organisational approach to the use of translation and interpretation services through the development of corporate guidance and communications	Policy	JH	24-Jun	Jamie has developed internal guidance on using the current service, and he is working with the commissioning team on the tender for new contract 1st April 2025

6.6	Lead workstream with key services to develop guidance on consistent organisational approach to accessibility of council documents and information	Policy	JH	24-Jun	Comms and digital team receiving two day inclusive comms training with AbilityNet - 20th and 21st November 2025
4.1	Map existing external engagement on EDI related issues	Policy	JH	24-Sep	Jamie working with Alec on mapping external partners via the W&F EDI Partnership - relaunching in January 2025 Link with Inclusive Cumbria network too
5.5	Work with democratic services to review and clarify information on council website regarding participation in public meetings	Policy	JH	24-Sep	Public participation scheme policy published on the website
6.1	Develop written diversity guide on protected characteristics/other groups and potential implications for staff/services.	Policy	JH	24-Sep	Jamie to incorporate this into new W&F Equality Policy / EIA form template and guidance - to be launched early 2025
6.3	Develop guidance on equality objectives and service planning	Policy	JH	24-Sep	Jamie to provide further support on embedded EIAs in service provision planning - ahead of February 2025 deadline
1.12	Provide equality impact assessment (EqIA) training for selected staff and members	Policy	JH	24-Oct	2/7/24 We have run the first two EDI/EIA training sessions. Jamie working on train the trainer EIA training with Heather Langton in OD team. Jamie working on updating the EIA template and guidance to be more user friendly - to be launched early 2025
1.6	Launch a new cross-organisational EDI network to shape the corporate approach to EDI	Policy	KB	Jul-24	Support resources for EqIA on SharePoint

1.7	Establish directorate EDI working groups to develop and champion directorate workstreams	Policy	CMT	Jul-24	ACE - group up and running with monthly meetings and representatives from each service team. Adults - EDI working group meeting monthly - includes rep from L&D and Comms 18/12/24 - Childrens - Action Group established with representation across the directorate, meeting bi-monthly Enabler Services - group meeting regularly, developing action plan. Resources - first meeting 17th December Thriving Communities - will expand initial service actions to bring in rest of directorate Thriving Places TBC
1.8	Develop directorate EDI action plans setting out actions to be taken in individual directorates; policy team to develop guidance on expectations for directorate plans.	Policy	CMT	Sep-24	17/9/24 ACE - ACE EDI action plan in place and being developed further by the directorate working group. 18/12/24 Childrens Services - Action plan in place and approved by DMT 16/12/24 8/7/24 Enabling - action plan started 8/7/24 Thriving Communities - action plan started with Housing and will expand 8/7/24 Adults - Working group established an ongoing with this 20/09/24 Enabler - Directorate plan work in progress, some short term action, longer term dependent on data availability but work ongoing Thriving Places tbc
2.7	Publish summary of W&F EDI information on W&F website	Policy	AP/EG	Sep-24	Position Statement on website: need ongoing review of what is included.
2.9	Develop locality EDI profiles for each W&F area	Performance	LP/AP	Sep-24	Included in EqIA advice resources on SharePoint. EDI section on Cumbria Observatory
1.13	Develop toolkit and guidance on EqIA	Policy	JH	Oct-24	Support resources for EqIA on SharePoint
1.14	Roll out EqIA programme of support via internal training, DMT and team meetings	Policy	JH	Oct-24	Jamie working on updating the EIA template and guidance to be more user friendly - to be launched early 2025
7.1	Undertake data collection exercise and establish gaps in workforce EDI data (Trent,	HR	GH	Oct-24	31/03/2024 - Data collected from legacy districts as overview for initial benchmarking

	Surveys, Network Groups, Feedback etc.)				
7.5	Implement exit interviews / surveys to capture staff feedback and take action to respond to issues identified.	HR	GH	Oct-24	3/7/24 Started and ongoing 17/09/24 - exit interviews survey now live. Exit interview procedure updates and letters are going through approval process and nearly ready for go live. 19/11 - Exit interview procedure, forms and survey updated and live.
7.6	Develop, consult on and implement processes for monitoring staff trends; staff satisfaction, absence, disciplinary, grievance, harassment etc - at organisation wide and service level	HR	JW	Oct-24	20/09/24 Senior Advisor for data now in place, plans being developed based on timeline for systems aggregation to enable reporting on EDI
7.7	Implement processes for regular analysis of pay/progress of different groups as well as gender	HR	GL	Oct-24	
8.1	Undertake analysis of local labour market to provide benchmark for W&F workforce (x-ref with Bay Anchor Network)	Performance	PW	Oct-24	Pippa Williams working on developing a workforce and labour market economic tracker 2.0 - lots of links to this across the organisation. To come in early 2025.
8.2	As part of workstream 7, implement processes to collect data EDI data at applicant, interview and recruitment stage	HR	GH	Oct-24	3/7/24 Started and ongoing 17/09/24 - As above - on hold pending the movement of legacy payrolls into Trent and in line with work to improve the recruitment process - systems dependant. 25/09/24 - Systems dependant - adding EDI information into application form. 19/11 - Systems dependant still. Application form updated and to go live as part of recruitment updated in new year. EDI Categories to be further updated in 2025.

8.3	Review information on adverts, social posts, job descriptions etc for inclusive language, accessibility and flexible working promotion	HR	GH	Oct-24	3/7/24 Started and ongoing 17/09/24 - Guidance and training drafted to improve EDI and accessibility of job descriptions and adverts. To be rolled out to HR Operations team and line managers by end of September. 19/11 - Guidance now live on HR/OD Sharepoint, HR Advisory team trained and new inclusive post specifications live.
8.4	Develop and review EDI best practice in recruitment: mandatory EDI questions, staff training, panel diversity etc	HR	GH	Oct-24	17/09/24 - Ongoing continuous improvement, but work to develop EDI questions and training not started. 19/11 - Working with Heather in ODWT on EDI training and recruitment training. To coincide with recruitment systems development.
8.5	Develop training on EDI in recruitment	HR	GH	Oct-24	3/7/24 Yet to start 17/09/24 - Yet to start 19/11 - As above. Working with Heather in ODWT.
8.6	Building on data collected as per 8.2 and 8.3, develop positive action/targeted recruitment for underrepresented groups	HR	GH	Oct-24	Not started - Systems and ICT dependant - linked to payroll migration and recruitment systems development. 19/11 - Starting to review existing recruitment data and linking with with specialist advertising and charities. Ongoing.
10.1	Develop and approve a policy/guidance on reasonable adjustments with input from staff networks and other groups	HR	BG/GH	Oct-24	19/11 - First draft developed and seeking feedback.
10.2	As part of reasonable adjustments work, agree position on creation of corporate budget for reasonable adjustments.	HR	LR	Oct-24	3/7/24 Started and ongoing
10.3	Review earlier work on role of staff networks to confirm corporate position on ToR and role of networks, officer time permitted to support networks etc	HR	BG	Oct-24	Staff network leads meeting with CMT in Feb 2024 to discuss further
10.4	Repromote role/work of staff networks across the organisation	HR	BG	Oct-24	Staff network chairs recorded promotional videos for each network - to be relaunched in January 2025

10.7	Promote Disability Confident Employer status and research Disability Confident Leader accreditation as lead organisation in Cumbria	HR	GH	Oct-24	Completed - Accredited Disability Confident Leader July 2024
10.8	Promote the 'Happy to Talk Flexible Working' initiative and work with Working Families to ensure Family friendly practices and flexible working benefits	HR	GH	Oct-24	Completed
10.9	Review and research other accreditations for EDI in recruitment	HR	GH	Oct-24	17/09/24 - Paper due to go to CMT 25/09/24 - Paper at DMT on 03/10/2024, CMT 09/10/2024 19/11 - Paper approved at CMT. Work to now progress on promises and pledges.
1.9	Embed oversight of EDI action plan into quarterly performance reporting to Cabinet, supported by annual review.	Policy	JH	Dec-24	Q1 and Q2 reports completed
2.1	Ensure all directorates have undertaken a mapping exercise to assess any data gaps and identified steps to address this as part of EDI action planning.	CMT	DSMs	Dec-24	17/9/24 ACE - this action has been incorporated into the actions for our working group. <u>Adult Services</u> - 18.12.24 - System have been identified and are being reviewed by the EDI workgroup. Childrens Services 24/9/24 Part of directorate action plan and ongoing. Enabler Services Part of directorate action plan - system dependent, part of ongoing CRM discussions Resources - 18/12/24 Will be incorporated into the Direcorate EDI Network action plan/tasks for the working group

2.2	As part of EDI training and support, ensure staff understand the importance of collecting EDI data and how this supports the organisation	CMT	DSMs	Dec-24	<p>Adult Services 18/12/24 - covered in Comms newsletter, reviewing completion of EDI mandatory training. Comms plan can commence once signed off.</p> <p>16/9/24 ACE - This is being addressed through the ACE EDI working group, as well as additional ways, such as at team meetings, communications and next away day.</p> <p>20/09/24 Enabler - will be part of CRM rollout and training</p> <p>24/09/24 Children's - part of directorate action plan and ongoing</p> <p>Resources - will include an item in the next newsletter and also check re the mandatory training</p>
2.3	Develop corporate templates of established questions and supporting guidance on data collection and how to use data collected for trend monitoring and service planning (ref 6.3)	Policy	JH	Dec-24	Jamie and Georgie developed a refreshed standardised list of demographic questions - reviewed by TU and staff networks. Trent being updated in January 2025. Adult Social Care will test the updated questions with their workforce.
2.4	Develop customer guidance on why data is collected	Policy	JH	Dec-24	Jamie working on FAQ documents with Georgie
2.6	Establish EDI monitoring process for complaints	Customer services	HB	Dec-24	<p>02/07/24 The new complaints process is in development and this has been incorporated into the requirements of the new process. We are on track for Dec deadline.</p> <p>20/09/24 JH working with Jonny Horn to establish this following Cabinet approval of new Complaints procedure in October.</p>
2.10	Agree mechanism for ensuring EDI team receive relevant info and intel from local officers/locality boards and cllrs generally	Policy	JH	Dec-24	Jamie linking with Helen Chaffey and Karen Edmondson on establishing a member special interest group / locality board links
4.2	Develop and agree EDI external engagement approach, incorporating key activities (eg, partnership meetings, Cumbria CVS sessions etc), in annual EDI workplan	Policy	JH	Dec-24	JH relaunching the W&F EDI Partnership group in January 2025 with new and reviewed key partners involved

5.1	Review legacy council approaches to tension monitoring (hate crime and community cohesion) and consider what is required for W&F	Safe and strong communities	RG	Dec-24	3/7/24 This is complete. There is a fortnightly tension monitoring call to get an update from various partners (including the re-settlement team). There is a standing agenda on each of the 3 Local Focus Hub meetings for partners to raise any issues. There is a standing agenda item on the (now) bi-monthly W&F Community Safety Partnership asking if partners are aware of any community tensions. There is a standing agenda item on the quarterly Cumbria Prevent Delivery Partnership asking if partners are aware of any community tensions. Hate crime figures are also reported via the police tasking document at each Local Focus Hub meeting.
9.3	Redesign and promote EDI training / support offer for staff (including considering need for cultural competence/inclusive language) in consultation with staff networks /others	OD	SB	Dec-24	JH working with Heather Langton on developing EDI hub with Learning Hub - to be rolled out early 2025
9.4	Ensure manager induction and development processes include guidance on EDI, including in relation to the Let's Talk process	OD	SB	Dec-24	As above
9.7	Develop a suite of guidance and tools for staff on EDI matters, in conjunction with corporate policy team	OD	SB/KB	Dec-24	As above
7.2	Work with trade unions and staff networks to develop approach to collecting staff data: EDI data collection; general surveys; focus groups; staff networks etc	HR	GH	Jan-25	3/7/24 Yet to start. This action has been pushed back to align with the movement of legacy payrolls onto itrent. 17/09/24 - As above. 25/09 - Meeting with TUs to be arranged. 19/11 - Feedback sought and implemented.
7.3	Promote/relaunch data collection for staff on EDI areas to improve monitoring data (i.e. application form, employee data check) and enable public reporting on workforce data	HR	GH	Jan-25	3/7/24 Yet to start. This action has been pushed back to align with the movement of legacy payrolls onto itrent. 17/09/24 - As above. 25/09 /24 - Payroll migration deadline pushed back to March 2025. 19/11 - EDI Categories on hold pending project and

					prioritisation within ICT Service. Can proceed in the time being with existing data.
6.4	Ensure corporate EDI objectives are fully reflected in corporate service planning process for 2025/6 onwards	CMT	AH	Feb-25	
1.10	Undertake and collate annual EDI reporting (reflected in EDI annual timetable)	Policy	JH	Mar-25	Dependent on all staff being on Trent system; linked to point 2.2
1.11	Ensure at least annual scrutiny of progress against action plan by corporate overview and scrutiny committee	Policy	JH	Mar-25	JH to update Corporate Overview and Scrutiny Committee on 20th January 2025
1.16	Produce annual report on use of EqIA across the organisation (* including how services are being adjusted in light of community engagement)	Policy	JH	Mar-25	New online form will allow for easier tracking
2.8	Develop dashboard of EDI information for W&F based on local, regional, national data sources	Performance	LP/AP	Mar-25	Included in EqIA advice resources on SharePoint. EDI section on Cumbria Observatory: https://www.cumbriaobservatory.org.uk/edi/
3.6	Update council communications and engagement strategy setting out how council will engage, incorporating guidance on ensuring representative input from different groups	Communications	ST	Mar-25	
6.8	Retender existing translation, interpretation and BSL support, with consideration given to framework approach	Commissioning and procurement	SS	Mar-25	Procurement exercise has now gone live

6.9	Develop and agree proposals for a programme of capital works to improve accessibility of the council estate	Assets and capital	AH	Mar-26	To be picked up as part of the Directorate EDI action plan and programme
6.11	Develop guidance for prospective suppliers on W&F EDI approach and objectives	Policy	JH	Mar-25	Jamie linking with Ali McCulloch on exploring this
6.12	Consider how equalities can be further reflected in commissioning, tender processes and contract monitoring (eg guidance for commissioning teams etc).	Commissioning and procurement	SS	Mar-26	To be picked up as part of the Directorate EDI action plan and programme
7.8	Develop objectives and action plan based on analysis of trend data identified as part of 7.6 and 7.7, eg career development plans; specific training to address trends etc	HR		Mar-25	
9.6	Ensure programme of work to develop organisational culture work fully reflects EDI	OD	SB	Mar-25	<u>Keith Cheesman</u> Adults has set up an EDI Working Group, covering workforce and service reps to build workplans into the Promoting Independence and Wellbeing Programme. 20/09/24 Culture development steering group in place and work ongoing, also links to Staff Pulse Survey and directorate improvement plans
10.10	Consider development of specific equality policy for W&F	Policy	JH	Mar-25	Jamie working on this with Georgie Hubberstey
2.11	Map out what partner data exists, how this could be used to inform W&F understanding of locality, and options/protocols for sharing types of data	Policy	JH	Dec-25	Links to relevant local data included on Data and Insight Portal

6.2	With reference to 3.6 and 5.4, support cross organisational approach to how W&F seeks the lived experience of its community and builds this into service development processes	Policy	KB	Dec-25	<u>Keith Cheesman</u> Adults is working on its Co-Production framework which includes both EDI and People with Lived Experience forums 24/09/24 Children's Partnership Team - ongoing work to engage with Care Experienced young people; SEND Partnership Board has published Co-Production Charter to ensure lived experience is central to design and delivery of services (linked to directorate action plan)
6.13	Review EFLG expectations around consideration of human rights and safeguarding in service design and delivery	Policy	JH	Dec-25	
5.6	Work with democratic services to collect councillor EDI data and explore with members/political groups scope for Be a Councillor campaign in relation to 2027 elections	Policy	JH	Mar-26	
7.4	Work with members and policy to agree, undertake and promote EDI data collection for all councillors.	Democratic services	KE	Mar-26	5/7/24 Not yet started. This will be on the MDSG work programme for early 2025 to progress.
9.5	Ensure uptake of EDI training is monitored over time	OD	SB	Mar-26	
5.7	Scope out specific phase 2 piece of work to understand and diversify participation in civic and other roles and potential W&F role in this	Policy	JH	April 2025-March 2026	
4.4	Engage with external partners and communities to develop a phase 2 EDI workstream and objectives beyond Spring 2026	Policy	JH	June 2025-March 2026	
1.15	Undertake routine monitoring of EqlA usage and quality	Policy	JH	Ongoing	

2.5	Ensure all service user trend data is monitored by protected characteristic/EDI groups - eg) outcomes, satisfaction, complaints etc	CMT	DSMs	Ongoing	17/9/24 ACE - this action has been incorporated into the actions for our working group. Resources: Initial conversation held with Revs & Bens Service Manager and this isn't currently collected. Will be incorporated into Action Plan. 18/12- Adults - Collecting this data, looking at trends and identifying any gaps. 20/09/24 Enabler - This forms part of the long term actions of the directorate action plan as part of the CRM workstream 18/12/24 - Childrens - incorporated into directorate action plan but dependent on systems disaggregation (LCS) and digital developments (eg. Liberty)
4.3	Maintain ongoing awareness of and engagement with local EDI organisations as landscape/workstream evolve, x-ref with 2.10/work of Locality Boards	Policy	JH	Ongoing	24/09/24 Children's - engaging with Anti Racist Cumbria for Anti Racism in Education events. Part of directorate action plan.
5.2	Ensure ongoing focus on tension monitoring/fostering community cohesion through local focus hub meetings, Prevent work and work of Global Resettlement Team.	Safe and strong communities	RG / DSC	Ongoing	3/7/24 This is complete. There is a fortnightly tension monitoring call to get an update from various partners (including the re-settlement team). There is a standing agenda on each of the 3 Local Focus Hub meetings for partners to raise any issues. There is a standing agenda item on the (now) bi-monthly W&F Community Safety Partnership asking if partners are aware of any community tensions. There is a standing agenda item on the quarterly Cumbria Prevent Delivery Partnership asking if partners are aware of any community tensions.
5.4	Work closely with team developing W&F Community Power offer to ensure groups in scope of our EDI work are central to this and CWB opportunities across the Council.	Policy	KB	Ongoing	EDI relevant organisations mapped and ready for consultation as part of process.

10.5	Work with communications team to continue to run regular staff pulse surveys and analyse findings based on EDI data (x-ref with 7.1)	HR	BG	Ongoing	3/7/24 Started and ongoing
10.6	Maintain existing structures for engaging with staff: staff networks, change champions, CEX sessions, staff newsletter	HR	LR	Ongoing	3/7/24 Started and ongoing