

EQUALITY, DIVERSITY AND INCLUSION MONITORING POLICY

PRN-56: Equality, Diversity and Inclusion Monitoring Policy

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Trading/Business Name: Trusted Companionship

Company Registration Number: 15556946

SIC Code: 88100 – Social Work Activities Without Accommodation for the Elderly and Disabled

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1. Purpose

The purpose of this policy is to establish the organisation's approach to monitoring equality, diversity, and inclusion (EDI) across its services, workforce, volunteer programme, governance arrangements, and organisational activities.

The organisation is committed to promoting equality, valuing diversity, and fostering an inclusive environment where all individuals are treated fairly, with dignity and respect.

This policy aims to:

Measure equality and inclusion outcomes.

Identify barriers to participation.

Support evidence-based decision-making.

Monitor compliance with equality legislation.

Promote continuous improvement.

Improve accessibility and inclusion.

Support fair treatment for all individuals.

2. Scope

This policy applies to:

Service users

Employees

Volunteers

Trustees

Directors

Applicants for services, employment, or volunteering opportunities

Partner organisations where appropriate

The policy applies to all organisational functions and activities.

3. Policy Statement

The organisation is committed to collecting, monitoring, reviewing, and analysing equality information to identify trends, address inequalities, and improve services.

Monitoring activities will be conducted:

Lawfully.

Transparently.

Respectfully.

Proportionately.

In accordance with data protection legislation.

The organisation will use monitoring information to improve equality, diversity, inclusion, accessibility, and participation.

4. Principles

EDI monitoring will be based on:

Respect

Individuals will be treated fairly and with dignity.

Confidentiality

Information will be handled securely and appropriately.

Voluntary Participation

Individuals will normally be free to choose whether to provide monitoring information.

Transparency

The reasons for collecting information will be explained.

Improvement

Data will be used to improve services and outcomes.

5. Objectives

The organisation aims to:

Understand who accesses its services.

Monitor workforce and volunteer diversity.

Identify underrepresented groups.

Improve accessibility and inclusion.

Detect potential inequalities.

Support equality impact assessments.

Inform strategic planning.

Promote fair opportunities.

6. Legal Framework

This policy is informed by:

Equality Act 2010

Human Rights Act 1998

Data Protection Act 2018

UK GDPR

Care Act 2014

Relevant equality and human rights guidance

The organisation will ensure compliance with applicable legal requirements.

7. Why Monitoring is Important

Monitoring helps the organisation to:

Understand community needs.

Identify barriers to access.

Improve outreach activities.

Support inclusive recruitment.

Measure service impact.

Promote fairness and accountability.

Monitoring supports continuous improvement and informed decision-making.

8. Equality Monitoring Information

The organisation may collect information relating to:

Age

Disability

Ethnic background

Race

Religion or belief

Sex

Gender identity

Sexual orientation

Marital or civil partnership status

Pregnancy and maternity

Caring responsibilities

Information should be relevant and proportionate to organisational needs.

9. Service User Monitoring

The organisation may monitor:

Demographic information.

Service access patterns.

Participation levels.

Feedback and satisfaction.

Accessibility requirements.

Community engagement outcomes.

Monitoring helps identify whether services are reaching diverse groups effectively.

10. Employee Monitoring

Monitoring may include:

Recruitment data.

Promotion opportunities.

Training participation.

Retention data.

Grievances and complaints.

Exit information.

Workforce monitoring helps support fair employment practices.

11. Volunteer Monitoring

Volunteer monitoring may include:

Applications received.

Appointment rates.

Training participation.

Retention rates.

Volunteer experience feedback.

This information supports inclusive volunteer recruitment and management practices.

12. Trustee and Governance Monitoring

The organisation may monitor:

Trustee diversity.

Board representation.

Recruitment activity.

Governance participation.

Monitoring can help ensure governance structures reflect the communities served.

13. Collection of Information

Information should be collected:

Fairly.

Transparently.

Voluntarily, unless legally required.

Through secure methods.

Individuals should understand:

Why information is being collected.

How it will be used.

How it will be protected.

14. Data Protection and Confidentiality

EDI information will be:

Stored securely.

Accessed only by authorised individuals.

Processed lawfully.

Retained appropriately.

Protected from unauthorised disclosure.

Data protection requirements must be followed at all times.

15. Use of Anonymised Data

Where possible, monitoring data should be:

Aggregated.

Anonymised.

Presented in statistical form.

This helps protect privacy while supporting organisational learning and improvement.

16. Identifying Inequalities

Monitoring information may be used to identify:

Underrepresentation.

Barriers to access.

Service disparities.

Participation gaps.

Accessibility concerns.

Potential discrimination.

Identified concerns should be explored and addressed where appropriate.

17. Accessibility Monitoring

The organisation will monitor accessibility arrangements, including:

Communication needs.

Alternative format requests.

Physical accessibility requirements.

Participation barriers.

Reasonable adjustment requests.

Accessibility information supports inclusive service delivery.

18. Recruitment Monitoring

Recruitment monitoring may consider:

Diversity of applicants.

Shortlisting outcomes.

Appointment outcomes.

Volunteer recruitment data.

Monitoring should support fair and inclusive selection processes.

19. Service User Feedback

Feedback from service users may help identify:

Experiences of inclusion.

Accessibility barriers.

Equality concerns.

Suggestions for improvement.

Feedback should contribute to service development.

20. Equality Impact Assessments

Monitoring information may be used to support:

Equality Impact Assessments.

Service reviews.

Policy development.

Strategic planning.

Data should help inform evidence-based decisions.

21. Reporting and Analysis

Monitoring information may be analysed to identify:

Participation trends.

Diversity trends.

Service access patterns.

Equality outcomes.

Areas requiring improvement.

Reports may be presented to management and governance bodies where appropriate.

22. Action Planning

Where monitoring identifies concerns, actions may include:

Policy reviews.

Accessibility improvements.

Targeted outreach.

Additional training.

Recruitment initiatives.

Service redesign.

Actions should be proportionate and measurable where possible.

23. Staff and Volunteer Awareness

Employees and volunteers should understand:

The purpose of equality monitoring.

Confidentiality requirements.

Data protection responsibilities.

The organisation's commitment to inclusion.

Awareness may be promoted through induction and training.

24. Equality Monitoring Forms

Monitoring forms should:

Explain the purpose of data collection.

Be easy to understand.

Be accessible.

Allow individuals to choose not to disclose information where appropriate.

Participation should normally be voluntary.

25. Reviewing Equality Objectives

The organisation may periodically review:

Equality objectives.

Inclusion priorities.

Diversity outcomes.

Accessibility arrangements.

Reviews should be informed by monitoring information and stakeholder feedback.

26. Benchmarking and Improvement

Where appropriate, the organisation may compare monitoring information against:

Local demographics.

Service demand.

Organisational objectives.

Previous performance data.

Benchmarking can support improvement planning.

27. Managing Equality Concerns

If monitoring identifies potential concerns, the organisation may:

Conduct further analysis.

Review policies.

Seek feedback.

Undertake Equality Impact Assessments.

Develop improvement plans.

The aim is to promote fairness and reduce barriers.

28. Case Study

Scenario: Low Participation from Disabled Adults

Monitoring data indicates that participation in a community wellbeing programme is lower among disabled adults than expected.

Action Taken

Accessibility needs are reviewed.

Service users are consulted.

Alternative communication formats are introduced.

Venue accessibility is reassessed.

Transport support information is improved.

Outcome

Participation levels increase and accessibility barriers are reduced.

Learning Point

Monitoring information can help identify barriers and improve inclusion.

29. Responsibilities

Board of Trustees

Responsible for:

Providing oversight of equality performance.

Reviewing monitoring information.

Supporting equality objectives.

Promoting inclusive governance.

Directors

Responsible for:

Implementing this policy.

Reviewing equality data.

Ensuring improvement actions are developed where required.

Managers

Responsible for:

Collecting and reviewing relevant information.

Identifying equality concerns.

Implementing improvement plans.

Employees and Volunteers

Responsible for:

Supporting inclusive practices.

Respecting confidentiality.

Participating in monitoring activities where appropriate.

30. Monitoring and Quality Assurance

The organisation will monitor:

Service user demographics.

Workforce diversity.

Volunteer diversity.

Trustee diversity.

Accessibility requests.

Complaints relating to equality issues.

Equality Impact Assessments completed.

Inclusion outcomes.

Monitoring findings will be used to promote equality, improve services, and support continuous improvement.

31. Review Arrangements

This policy will be reviewed:

Annually.

Following significant equality reviews.

Following legislative changes.

Following service redesign.

Following identified equality concerns.

Related Policies

Equality, Diversity and Inclusion Policy

Equality Impact Assessment Policy

Accessibility and Inclusive Communication Policy

Recruitment and Selection Policy

Volunteer Management Policy

Data Protection and GDPR Policy

Service User Participation and Feedback Policy

Governance, Board and Trustee Responsibilities Policy