

The Phoenix Fellowship Diversity, Equity & Inclusion (DEI) Policy

Version 1.0

Statement of Assurance

This Diversity, Equity and Inclusion (DEI) Policy has been developed to ensure that The Phoenix Fellowship (TPF) meets and exceeds its responsibilities under the Equality Act 2010, aligns fully with the Charity Commission's expectations for good governance and public benefit, and reflects best practice across the UK charitable sector. It incorporates the principles outlined in the Charity Governance Code (2020), particularly Principle 6 on Equality, Diversity and Inclusion, and is designed to be practical, actionable, and regularly reviewed.

By embedding DEI into every aspect of our operations, from governance and recruitment to programming and grant-making, we aim to create an inclusive, equitable and representative environment that enables individuals from all backgrounds to thrive, contribute, and lead. This policy is a cornerstone of our commitment to transparency, fairness, and meaningful impact.

Purpose & Scope

To embed diversity, equity, and inclusion in every aspect of TPF's work. This policy applies to trustees, staff, volunteers, contractors, grant applicants, and partners. It ensures fair treatment, equal opportunity, and an environment where all can contribute and thrive. Under the Equality Act 2010, it's illegal to discriminate against protected characteristics (age, disability, gender reassignment, race, religion/belief, sex, sexual orientation, marriage/civil partnership, and/or pregnancy/maternity). The Charity Code emphasizes that inclusive governance enhances public trust and decision-making.

Definitions

To ensure clarity and consistency in our approach, we use the following definitions throughout this policy:

- “Diversity”: A mix of demographic and experiential backgrounds.
- “Equity”: Fair access, opportunity, and advancement for all.
- “Inclusion”: Creating a culture where everyone feels welcome, respected, and able to participate fully.

Principles & Commitments

TPF is committed to embedding DEI in our culture, decision-making, and daily operations. Our guiding principles include:

- Embedding fairness across its operations.
- Actively identifying and addressing barriers to participation.
- Ensuring its governance reflects diverse perspectives.
- Regularly reviewing and publicising progress on DEI objectives.

Board & Governance

The Board holds responsibility for leadership in DEI. Specifically, it will:

- Conduct an annual DEI audit.
- Set DEI objectives.
- Report annually on DEI progress in the annual report.

Recruitment & Selection

We aim to ensure our recruitment processes are inclusive and accessible. We will:

- Use diverse candidate pools for trustee, staff, and volunteer roles.
- Include at least one diverse panel member in interviews.
- Provide clear access information.
- Offer flexible working and reasonable adjustments.

Culture & Behavior

Creating a respectful and inclusive organisational culture is central to our success. To support this:

- All participants must treat each other with dignity and respect.
- Inclusive behaviours should be modelled by the Board and Staff.
- Training in unconscious bias and inclusive leadership will be provided annually.

Inclusive Programming & Delivery

Our programming is designed to reach and reflect the diversity of the communities we serve. We will:

- Ensure all TPF events welcome a diversity of participants.
- Use inclusive imagery and language.
- Actively encourage applicants from underrepresented backgrounds.
- Monitor outreach, application, and selection data.

Accessibility & Reasonable Adjustments

We are committed to ensuring our work is accessible. Reasonable adjustments will include:

- Providing accessible venues and remote / online access.
- Offering reasonable adjustments for travel, dietary needs, communication support.

Handling Concerns & Complaints

Concerns related to DEI will be handled promptly and sensitively. We provide the following routes:

- DEI-related concerns can be reported confidentially to the Chair or Safeguarding Lead.
- Reports will be investigated swiftly and impartially.
- Whistleblower protections apply.

Training & Awareness

Ongoing training ensures our commitment to DEI remains active and informed. We will provide:

- New trustees, staff, and volunteers will receive DEI induction training.
- Ongoing refresher training provided annually.
- Annual Board DEI workshop using external facilitators if needed.

Whistleblowing and Incident Escalation

We encourage individuals to speak up about misconduct and provide clear channels to do so.

- Suspected fraud or misuse of funds must be reported to the Chair or another Trustee immediately.
- Reports may also be made confidentially to the external auditor or Charity Commission.
- Whistleblowing protection applies to anyone acting in good faith. Example: A volunteer who identifies duplicate payroll entries is encouraged to raise this confidentially and will be protected from any negative consequences.

Monitoring, Evaluation, & Reporting

We will track and publish our DEI progress as part of good governance. This includes:

- DEI metrics will be reviewed annually.
- Findings inform future DEI objectives.
- Performance will be published in the annual report.

Responsibilities

Clear lines of responsibility ensure accountability. Specifically:

- The Board of Trustees endorses the policy and sets objectives.
- The DEI Lead coordinates training and audits.
- All trustees, staff, volunteers, and partners must uphold these principles.

Contact

If you have any questions about this policy, please contact the Policy Lead using the policy@phoenixfellow.org email address.

Review

This policy is reviewed at least once a year and sooner if legal requirements or our operations change. The version number and effective date will be updated on publication.

Effective date

Effective from. 1st October 2025

Document owner. Policy Lead.

Next planned review. September 2026

Trustee Implementation Guide

This guide supports Trustees of The Phoenix Fellowship in applying the DEI Policy in practice. It sets out clear expectations and responsibilities to ensure accountability and leadership in promoting diversity, equity, and inclusion throughout the charity's activities.

1. What Trustees Must Know

As Trustees, you are responsible for ensuring the charity actively upholds and implements its Diversity, Equity and Inclusion (DEI) commitments. This policy aligns with the Equality Act 2010 and Charity Commission guidance. Your role includes fostering a culture of inclusion and transparency, ensuring that DEI principles are reflected not only in public-facing activities but in governance and decision-making.

2. What Trustees Must Do

Trustees are expected to:

- Attend annual DEI training or a Board DEI workshop.
- Ensure recruitment panels include diverse perspectives and follow inclusive practices.
- Review DEI metrics annually and use data to inform strategic planning.
- Approve and monitor delivery of DEI objectives set by the charity.
- Promote inclusive programming and accessible events.
- Uphold DEI principles in all trustee decisions and encourage others to do the same.

3. Red Flags and Escalation

Trustees should remain vigilant to signs of non-compliance or weak implementation, including:

- A persistent lack of reasonable adjustments or access provisions.
- Homogeneity in trustee or staff recruitment, or in programme participation.
- Concerns raised about discriminatory behaviour that go unaddressed.

Any such issues should be raised with the Chair or tabled for formal discussion. Reports will be handled with confidentiality and whistleblowing protections will apply.

4. Board Calendar Insert

To support consistent oversight, the following DEI-linked actions should be calendared annually:

- Q1: Review and approve annual DEI objectives.
- Q2: Conduct an internal DEI audit and assess training coverage.
- Q3: Evaluate the inclusivity of programmes and accessibility of events.
- Q4: Review and approve DEI disclosures in the Annual Report.

Approved by the Board of Trustees on July 15th, 2025.

Next Review Date: 18th July, 2026