# EQUALITY, DIVERSITY AND INCLUSION MONITORING POLICY

**PRN-56:** Equality, Diversity and Inclusion Monitoring Policy

**Company Name: AI Auto-Tech Ltd**

**Trading/Business Name: CAREHOPES**

**Company Registration Number: 15556946**

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

**Email:** admin@carehopes.com

**Version Number: V01 20260815**

**Date of Review: (August 2026)**

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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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**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.

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**31. Review Arrangements**

This policy will be reviewed:

Annually.

Following significant equality reviews.

Following legislative changes.

Following service redesign.

Following identified equality concerns.

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**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