

Diversity, Equity and Inclusion Progress Report March 2023

Background

Against a backdrop of high profile social justice movements, the charitable sector, including funders, has come under heightened scrutiny in recent years. In light of this, in June 2020, Somerset Community Foundation (SCF) created a working group of trustees and staff to improve our performance with respect to diversity, equity and inclusion.

The response to the Coronavirus pandemic, and in particular the way the pandemic affected more marginalised groups in society, created a further focus and urgency for change. At SCF we take this very seriously and have taken time to understand more about concepts like intersectionality and adopted an approach of continual improvement. Work on this is not like an on-off switch. It is more like a dimmer that you push up, day after day, month after month, year after year.

This progress report highlights what we have done so far and what our next steps will be. It also, for the first time, provides an analysis of who we are. We acknowledge that there is much more we can and must do and we are inviting comment and feedback on this update.

Key points

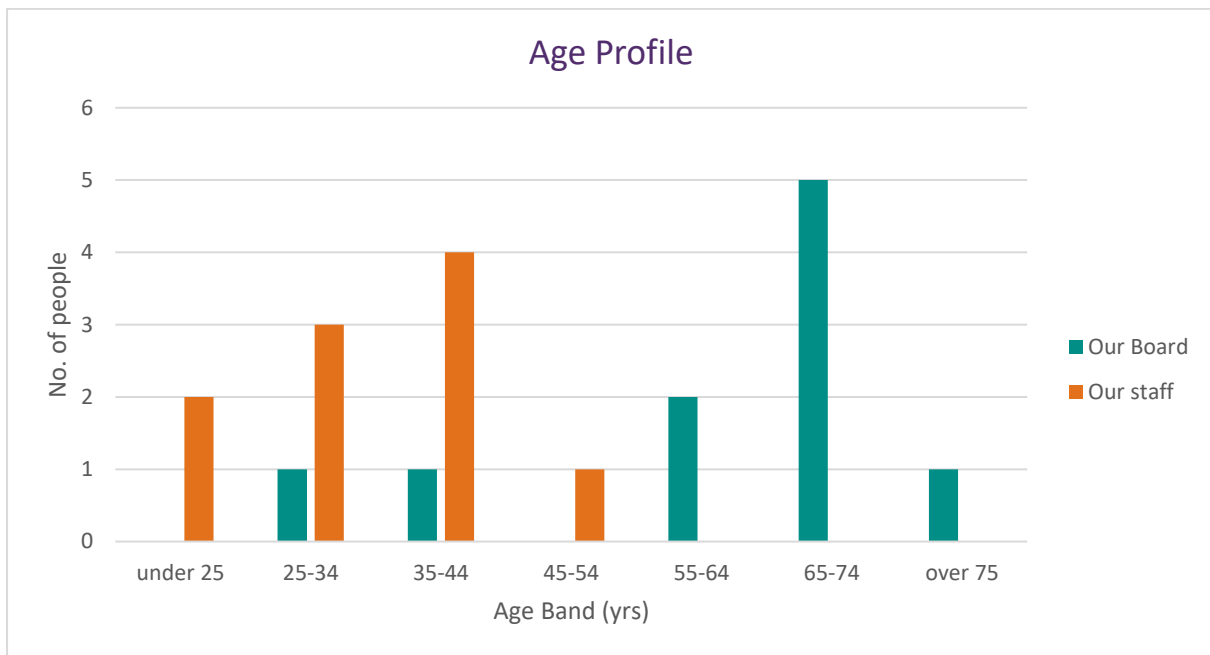
1. We adopted a Diversity, Equity and Inclusion policy in June 2021, subsequently published on our website with an accompanying statement. To support this we drew on a wide range of resources, many of which are listed as an annex to this report.
2. We adopted more flexible and family-friendly working practices to become a more inclusive employer, including introducing enhanced parental leave and pay, and providing flexibility in the use of leave for non-Christian religious days.
3. We made improvements to our recruitment processes for trustees, staff and volunteers, emphasising our interest in attracting applicants from a diversity of backgrounds.

4. Funding was provided to organisations supporting ethnic minority communities and promoting stronger social cohesion, including Diversity Voice and the Diverse Communities team in CCS.
5. We commissioned research to improve the way the Discovery Community Fund responds to the needs of people with learning disabilities by detailing their wishes for the fund, and we have subsequently started to adapt the fund accordingly, including trialling participatory grant-making with people with additional needs.
6. For the first time we publicly advertised for volunteers to serve on our Grants Panel with the view to increasing diversity of experience and thought amongst its members. As a result community representation on our Grants Panel has improved with the appointment of 6 independent members.
7. We provided training on 'Power and Privilege' in grant-making to staff, trustees, volunteers and fundholders.

Who we are today¹

Metric	Benchmarks (where available)			Our Board	Our staff	Combined
	UK	Somerset	UK Civil Society			
Female:Male	51:49	52:48	32:68	38:62	70:30	54:46
% identifying other than straight/heterosexual	4%	5%	-	0%	30%	15%
% self-identify living with disability	19%	19%	21%	0%	0%	0%
% from Black, Asian or other non-White backgrounds	15%	2%	9%	8%	10%	9%
% educated to degree or above	-	35%	-	90%	80%	85%
% in receipt of benefits growing up	-	-	-	10%	70%	40%

¹ Based on survey Sept/Oct 2022



With such a small team (at the time of the survey, the number of trustees and staff combined was 25), we have to be careful of attaching too much weighting to the statistical significance of these results, let alone expect any individual to be wholly representative of any aspect of diversity. However we hope this gives an impression of the level of diversity within the Foundation.

We can note that at the time of survey:

- While there is good gender balance across the whole organisation, there is a stronger weighting to male on the Board and to female in the staff team.
- While we have representation across most of the age range across the organisation, the trustee average is around 60 years (which is close to the UK average for charity boards), and the staff average age is around 35 years.
- SCF does not have anyone with a disability within the Board or in the staff. However while the survey asked about self-identified disability, the benchmarks are for '*disability and other long-term health conditions*'. Had the survey question included this longer definition, it is likely there would have been a small number of positive responses. This will be amended for the next survey. We will also capture information about people who are neuro-diverse.
- The trustees and staff team are, overall, educated to a higher level than the general Somerset population.
- The majority of our staff have experience of growing up in low-income households.

Overall, and with the exception of disabilities, SCF has a reasonable level of diversity. We do need to reflect on barriers to people with disabilities joining the organisation, and we also need to look at whether there are barriers we can remove

that will enable more people from different backgrounds and cultures who have the skills, experience and insights we need to join our Board. This could include using co-option on to a sub-committees or grants panel could be a pathway to becoming a trustee.

Due to the relatively small size of our own Grants and Social Investment Committees we did not collate results from co-opted members to protect anonymity.

In the meantime we must work to ensure that the lived experiences that exists within the organisation, and in the communities we serve, are heard and help us improve the ways in which we respond to our local community needs and we will continue to stretch ourselves to involve people from a wider range of backgrounds in decision-making roles for our funding programmes.

Next steps

While we have made good progress, there is much more we can and must do to embed a greater focus on DEI in everything we do. We are very grateful to the members of the Working Group we established to provide leadership on this. They have given us a good start and roadmap, but to ensure the focus on DEI does not become 'siloes' accountability for ensuring progress is being made has been handed to the CEO, with the support of a lead trustee.

We will continue in our efforts to better reflect, and become more inclusive of, the communities we serve. In addition, during the coming year we have a number of priorities and actions:

As an employer

1. Improvements to office work-space to make it more accessible to people with disabilities
2. Introduce menopause-friendly working practices.
3. Explore appropriate ways to recognise the lived experiences of our staff and trustees, and extend our diversity survey to take account of people living with long-term illness and neurodiversity.

As a funder

4. Provide more funding to historically underfunded communities and their support organisations, for example to support training and development, creating delegated grant programmes delivered through partners, and responding to direct applications from groups led by members of these communities.
5. Create a system for recording how our funding reaches historically underfunded communities, including groups led by minority-ethnic groups.

6. Create more opportunities for people from different backgrounds and cultures to shape our programmes and/or join our funding panels for grants and social investments.

In our influencing role

7. Develop a leading role within UK Community Foundations on investigating how rurality impacts on issues of inequity, and the response of philanthropy to this.

In our communications

8. Create a new accessible website, ensuring that our new brand identity is accessible in terms of fonts, colour palette and graphic design.
9. Improve the way our marketing and communications are designed to be inclusive and reflect the diversity within the communities we serve.

This list is not meant to be exhaustive but it does reflect the next steps we feel we can and should take at this stage.

Annex 1: Resources used by trustees and staff

DEI Coalition - Transforming UK Philanthropy

<https://deicoalition.com/>

ACF - DEI: The pillars of stronger foundation practice

https://www.acf.org.uk/common/Uploaded%20files/Research%20and%20resources/Stronger%20foundations/ACF_DEI_Thepillarsofstrongerfoundationpractice_final.pdf

CAF - From the margins to the mainstream

<https://www.cafonline.org/docs/default-source/about-us-policy-and-campaigns/from-the-margins-to-the-mainstream--philanthropy-diversity-equity-and-inclusion-in-our-society-june-2020.pdf>

Grant Givers Movement - Discrimination, prejudice and isomorphism

https://www.grantgiversmovement.org/files/ugd/0cd318_096bd55a4f7f410e896646af6d3e86aa.pdf