Equality Matters

A Good Practice Guide

LARGE PRINT
Revised October 2011

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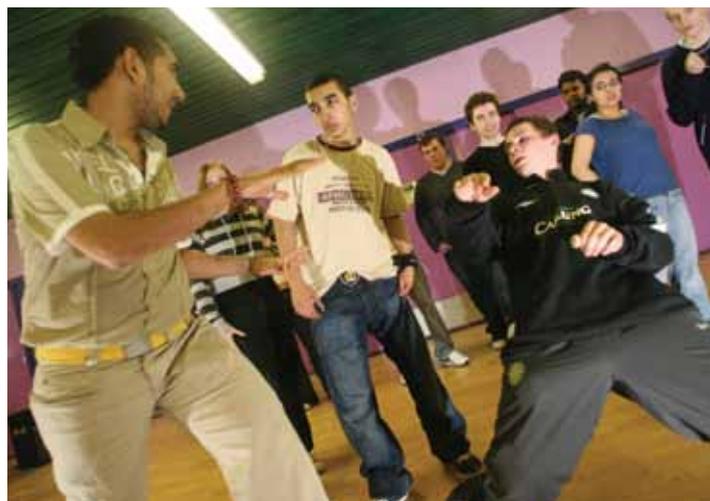
Equality Matters Guide 1–Revised LARGE PRINT

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Accessibility

Please contact us to discuss any specific communication needs you may have

Our equality principles

Promoting accessibility; valuing cultural diversity; promoting participation; promoting equality of opportunity; promoting inclusive communities; reducing disadvantage and exclusion. Please visit our website for more information.

We care about the environment

The Big Lottery Fund seeks to minimise its negative environmental impact and only uses proper sustainable resources.

Our mission

We are committed to bringing real improvements to communities and the lives of people most in need.

Our values

We have identified seven values that underpin our work: fairness; accessibility; strategic focus; involving people; innovation; enabling; additional to government.

The Big Lottery Fund is committed to valuing diversity and promoting equality of opportunity, both as a grantmaker and employer. The Big Lottery Fund will aim to adopt an inclusive approach to ensure grant applicants and recipients, stakeholders, job applicants and employees are treated fairly.

Awarding funds from
The National Lottery®

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Introduction

Equality matters to the Big Lottery Fund. We want to use Lottery money to bring about BIG changes to communities by funding people, projects and programmes, with a particular emphasis on tackling need. This guide is part of our drive to promote equality and maximise opportunities for people to take part in the projects we fund.

By putting equality right at the heart of project design and implementation, organisations are more likely to achieve better outcomes.

About this guide

This is a practical guide. It is designed to help you think about and describe your everyday practice on equality. It is particularly aimed at small to medium sized voluntary or community organisations, whether or not they are applying to the Big Lottery Fund (BIG) for a grant.

This guide aims to help you to identify what you already do well in your approach to equality issues, and help you to identify how you could do even better. Ultimately, however, it is up to you how far you want to consider equality issues.

The guide aims to help you in three ways:

1. It provides practical help on how to incorporate equality into planning new projects.

2. It explains BIG's equality principles and why it is important to pay attention to these if you are applying to BIG for a grant. In general we would expect you to demonstrate a commitment to equality, which is proportionate to the nature and size of your project and organisation.

3. It explains how BIG expects your organisation to implement equality once you have a grant.

Along the way, we provide practical exercises and tips. We also look at some of the common mistakes that grant applicants make, and provide examples of good practice from previous applications to BIG.

Section 1

1. What do we mean by equality?

Equality is a short-hand term for all work carried out by an organisation to promote equal opportunities and challenge discrimination, both in employment and in carrying out its work and delivering services.

2. What are BIG's six equality principles?

The aim of the Big Lottery Fund is to support projects that bring real improvements to communities and the lives of people most in need. As part of that commitment, we have adopted six equality principles to underpin our work. (NB: this list is not in any order of priority). We expect any organisation that we fund to share our commitment to these principles:

Promoting accessibility

People should be able to use services with relative ease, without spending too much time and money and which are sensitive to the different needs of people using them.

Valuing cultural diversity

People have different needs, beliefs, values and abilities and these differences need to be respected and promoted. Cultural diversity within an organisation helps:

- build trust and confidence between varied communities
- provides a richer mix of ideas and talents to draw from
- to create more efficient and effective decision-making.

Promoting participation

The best services are based on a close understanding of the needs they are trying to meet. This means that the people who will be affected by them should be involved in developing the services, because they know their needs best. Traditionally, some groups are more likely than others to be consulted and involved. The challenge for many organisations is to reach out and involve groups that are often left out, and to help them take a more active part in shaping the work that the organisation does.

Promoting equality of opportunity

Some groups in the community find it harder to get jobs and they may also find it harder to make use of services, or find using those services more difficult. We believe that we should create a level playing field for everyone and this may mean treating people differently in order to help them have the same chance to take part in work or in local services.

Promoting inclusive communities

We want to help build strong communities, in which:

- people feel they belong
- their lives are appreciated and valued
- people have similar life opportunities, and
- strong, positive relationships develop between people of different backgrounds.

Reducing disadvantage and exclusion

To help those groups most at risk of

being disadvantaged or excluded from work and services, there need to be initiatives that:

- deal with the causes of disadvantage and exclusion, and
- promote inclusion of the most disadvantaged and excluded.

3. What does disadvantaged mean?

Disadvantaged people have fewer opportunities than most people in the society around them in respect of one or more aspects of their lives, for example, education, health or employment, or having a poorer quality of life compared to those around them.

Disadvantage can be a result of many different factors in people's lives, which may reinforce each other. Disadvantage is often linked to poverty; it may be a result of patterns of discrimination or exclusion; it may derive from other kinds of differences among people. Disadvantage varies from community to community and within communities'.

Disadvantaged groups may include:
- people who are unemployed
- lone parents
- people with caring responsibilities
- families on low income
- single homeless people
- young people
- ex-offenders
- people with poor reading & writing skills
- young people leaving care

- lesbian, gay and bisexual people
- Travellers
- people living in isolated rural areas
- people with English as a second language
- refugees and asylum seekers.

This is not an exhaustive list.

Some people experience more than one form of disadvantage e.g. ex-offenders with poor reading and writing skills, lone parents in isolated rural areas or young disabled people leaving care. In cases like these, their needs will be particularly acute.

The law recognises that certain groups of people in our society may experience discrimination, and seeks to protect them.

As a result, people cannot be discriminated against on the basis of:
a their sex/gender
b their race/ethnicity
c their religion or belief
d their sexual orientation
e their age or
f gender re-assignment.
nor because they:
g are disabled
h are pregnant
i are married or
j are in a civil partnership.

In addition, in Northern Ireland people cannot be discriminated against on the grounds of political opinion, nor because they have caring responsibilities.

Section 1

In Wales, voluntary organisations providing services on behalf of a public authority **must** conduct their work on the basis of equality between English and Welsh. In Scotland, voluntary organisations providing services on behalf of a public authority are advised that they **should** conduct their work on the basis of equality between English and Gaelic.

BIG expects all applicants to comply with the law and to demonstrate that they work in ways that recognise the rights of all groups that are protected by the law. (There is a summary of all the relevant pieces of legislation within the 'further support' section of this guide).

Section 1
The BIG picture: our approach to equality

BIG recognises, however, that groups protected by law are not necessarily automatically disadvantaged. So, for instance, if your group was working with older people, you would still need to demonstrate that
they face disadvantage in order to get a BIG grant. Above all, we want to know who is experiencing disadvantage in your community and what you
know about their needs?

In a good grant application, we are looking to see
that you can describe:

- the kinds of disadvantage that are experienced in your community
- how your project will meet the needs of disadvantaged groups, whether the law protects them or not
- how you try to involve disadvantaged groups on
a day-to-day basis in your work, with practical examples.

4. Should we aim our project at the whole community, or target it at disadvantaged groups?

There are two broad approaches to promoting equality. The first is to create services for the whole community, including disadvantaged groups. It may involve making a range of changes to how you do your work so that people from disadvantaged groups know about your project, are made to feel welcome and can use your services. This is sometimes called having an **inclusive approach**.

The second approach is to set up a project that is aimed at a particular disadvantaged group, so that people can come together with others who share similar experiences. Again it may involve thinking in new ways about how you do your work so that these people can make use of the new project. This is sometimes called having a **targeted approach**.

Example of an inclusive approach

An advice agency wanted to respond to increasing demand for its services. As well as providing more face-to-face sessions, it also set up a telephone and email advice service.

The aim was to increase the numbers of people they helped, but also to improve access for those people who found travelling to one of the agency's offices difficult – older people, disabled people; as well as those who could not get to a session in normal opening hours, such as young people and those in work.

It also meant that they could make best use of advisers with community language skills. Instead of having to travel to different offices, advisers could ring people back.

By changing their approach, the advice agency significantly increased the numbers of people it could help, whilst doing so in ways that improved access for a range of groups in the community with particular needs.

Section 1

BIG can support either of these approaches to equality. If you would like BIG to provide funding for a targeted project, you must demonstrate that this is the best way in which the needs of the group you are targeting can be met. Within this approach you would still need to show that you take account of diversity issues.

In the example shown, for instance, the applicants would need to ensure that older people from minority ethnic communities or older people with caring responsibilities could use the project.

Example of an targeted approach

A community centre serving an inner city area ran a range of projects, including youth work, a nursery, after-school clubs, lunch club for older people, a health project and IT skills training.

They found that, although they were in touch with a large number of older people, they had no people over 50 signing up for their IT courses.

They talked to people attending their lunch clubs and older people involved in the health project,
to ask why they thought this was. The view emerged that:

▶ Older people felt intimidated by what they saw as younger people's greater confidence with IT.

▶ Older people wanted to learn at a more leisurely pace than the current training allowed, and to learn for different reasons.

▶ Older people wanted to use IT primarily for social and family reasons, rather than to get an IT qualification, sit exams or undergo tests.

The project felt that if they were to fully meet the aim of bridging the 'digital divide' in their community, they would have to set up a specific service for older people, which recognised their particular needs and interests. They created a series of new, informal workshops designed to bring IT expertise to older people locally.

Section 2: Making an application to BIG: thinking equality from the start

BIG has a wide range of programmes that organisations can apply to. The application forms and processes can be different, depending on the programme you are applying to, the size of grant you are asking for, and whether you are applying on your own, or with other organisations.

This means that it is hard to generalise about how much information BIG will expect you to give about your equality practices. Generally speaking, the larger the grant you are asking for, the more information BIG will ask from you.

How to get the most out of this section

This section follows four key steps in the process of planning your project:

- understanding the need and your beneficiaries
- being clear about your aims, outcomes and what you want to do
- reaching all the possible beneficiaries and enabling them to use the project
- exploring management and policy issues.

This section takes the same broad approach as BIG's earlier guide to using an outcomes approach 'Explaining the difference your project makes'. In this way, we hope to show how equality considerations can be taken on board at every stage of your project planning process.

In general, we would expect you to demonstrate a commitment to equality,

which is proportionate to the nature and size of your project and organisation. Ultimately, however it is up to you how far you want to consider equality issues.

We use a case study of a fictional family centre throughout the section, to illustrate how an organisation can address equality issues in planning and delivering its services. We hope this will make it easier to see how theory turns into practice. We also include some case studies of real organisations that have applied successfully to BIG.

You may find it works best if you read through this section, then work with other people in your project to complete the charts in the 'further support' section of this guide. We have provided the charts as a suggested approach, but it is not compulsory to complete them and you are not required to submit this information with your application.

If you do decide to use the charts, it is important to complete one step before tackling the next, as they build on one another.

When you have finished filling in the charts, you should have the information you need to show BIG in your application that you treat equality issues seriously throughout your work. The charts also include tips telling you, which questions on the application form the information could apply to.

Section 2

Step 1
Planning your project: understanding the need and your beneficiaries

This is the first step in putting your application together, and is also the place to start thinking about equality. You may have a clear idea about what you want to do – often because your existing work has shown you that there is an unmet need or a problem that needs to be tackled in your community.

There are likely to be various kinds of evidence that you want to use to back-up your application:

- your own experience, from day-to-day involvement
- statistics about the local area and its population, taken from the national census or other surveys (local authorities often publish useful summaries)
- some specific research that you or another organisation has carried out
- feedback from people with experience of the need.

It is important to bear in mind that although your knowledge is important, it may be based only on the experiences of people who are already using your project.

What do you know about the groups in your community who might benefit from the work you plan to do, but are not already in contact with you? Alternatively, you may recognise that there is a need you are not meeting, but you do not know the best way to tackle it, as you are not in touch with the people affected by it.

Either way, you may need to think creatively about how you can make contact with people that do not already use your project, so that you can talk to them about their needs and how you can encourage them to use your project.

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Equality key questions:

► Can you confidently identify different types of disadvantage faced by the people you want to serve?

► How can you reach out to disadvantaged people or groups to find out about their needs?

► Have you considered the needs of groups in the community that do not use your services at the moment?

► Are their needs the same as those of the groups that you already know well? If not, how are they different?

Example: Local family centre

This centre has been established for 20 years and serves a community with a high proportion of children and young people. A lone parent heads 25 per cent of local families.

The centre runs regular parenting classes, family education sessions focusing on reading, maths and IT, an advice centre, job preparation classes, and family fun days and trips in school holidays.

It has identified that 80 per cent of the adults who use the centre regularly are women. There is a particular lack of young men using the

You can find lots of information about your area from the following organisation:

National Statistics Neighbourhood Database
www.statistics.gov.uk
Phone: 0845 601 3034

Section 2

Step 1: understanding the need and potential beneficiaries

What is the need?	Who could benefit from the project? Within this, do any groups face particular disadvantage?	Are we already in touch with them?	How can we find out what they want?	What have they told us about their needs?
Young dads are not playing an active part in their children's lives.	Young men aged 16–25, whether living with their children or not. Statistics show: ▶ 50 per cent are white. ▶ 40 per cent are from the Black Caribbean community. ▶ 10 per cent are from the Asian community.	–not many of them. ▶ They do not come to our 'Parent power' courses, or our family fun days. Some used to come to the centre when they were children.	▶ Go and talk to them in places where young men are known to congregate. Examples might include sports clubs, youth centres and local take-aways. ▶ Hold a consultation meeting and invite young dads along by leaving leaflets in the same places.	▶ They see family issues as 'women's stuff' and not 'for men.' ▶ They find it difficult to talk about feelings. ▶ They find it hard to negotiate with their partners/ ex-partners about their children. ▶ Young unmarried Asian dads face stigma in their community.

Remember!

The most important thing at this stage is to think about everyone who could benefit from your project, not just the people you are already in contact with. Back up what you have learned in your day-to-day work with;

● relevant facts and figures, and

● what the people who might use the project say about what they need.

Be prepared to reach out to groups in the community that you do not know well. Find out how your project could help them.

Section 2

The following case study is taken from a recent application to one of BIG's programmes. It shows an organisation that worked hard to understand the needs of the people they were trying to reach. They made sure they knew the published research data then they set to work to make contact with as many potential users as possible. They were very creative in how they did this and by the end of the consultation, could demonstrate a deep understanding of what young people in their area wanted and needed.

Good practice case study

Reaching out: good practice in consultation

A youth project in Northern Ireland wanted to attract young people that were outside mainstream community life. Having researched the area they lived in, they knew it to be among the five per cent most deprived wards in Northern Ireland. It also had higher than average numbers of young people living there – 3,500 in total.

The applicants asked the youth committee of the club (all young people aged 12–18) to design a consultation process so that they could find out exactly what the young people in the area wanted. They got to work in a variety of ways, including:

▶ Every youth committee member was given a target number of young people who already attended the club to talk to and bring this information back to the committee (225 young people consulted).

▶ Youth project users went out on to the local estates to talk to other young people in shops, clubs, street corners, etc. The methods ranged from filling in questionnaires to casual conversations. 450 young people took part.

▶ The youth project organised a day conference, where they told young people the results of the consultation so far, and held more discussions in workshops. 237 young people took part in this event.

Over a three-month period the project succeeded in talking to almost a third of the young people in their catchment area. Of these, only one third already made use of the project.

The application to BIG sought funding to establish a range of short programmes around the issues identified through consultation. By seeking out the views of young people who did not already use the project, the applicants made sure their activities and services addressed the needs of all young people in the area.

Section 2

Step 2
Being clear about your aims, outcomes and what you want to do

Once you are clear about the needs for your project, you can decide what difference you want to make, and how you are going to do it. This is the point at which you may need to make choices about whether your project will offer services that are accessible to the whole community, including disadvantaged groups (inclusive approach) or whether you want to set up a project that is aimed at a particular disadvantaged group (targeted approach).

In the example of the family centre that we are using, there are elements of both approaches. The centre is proposing to review its existing activities to make them more 'dad-friendly' and to set up some new activities that will respond to the needs of local fathers, but will also be available to all parents.

On the other hand, some targeted activities are
being set up, to appeal specifically to young fathers (the dads and kids sessions) and it is also planning
a specific project for young Asian fathers, because it believes they face additional difficulties in getting involved.

In reality, this mixed approach is often how organisations try to open up their work to new groups with unmet needs.

Equality key questions:

▶ Now you know what the needs are, what is the overall difference that you want to make?

▶ What are the main things you want to have changed by the end of the project? Do any of these changes relate to disadvantaged groups?

▶ What do you need to do to bring about these changes?

▶ Can you achieve the changes you want by making your services accessible to everyone in the community, including disadvantaged groups?
Or do you need to offer a specialist, targeted service? Or both?

▶ If you are to reach your target groups, how might you have to change your activities and approach from what you do at the moment?

Remember!

Whatever approach to equality you choose, you have to be able to show how it links to the needs that you have identified.

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Example: Local family centre

Step 2: Being clear about aims, outcomes and what you want to do

What difference do we want to make? (overall aim)	What are the main changes we want to bring about? (intended outcomes)	What will we do to make this happen? (activities)
—to improve the ability of young fathers to be good parents, whether living with their children or not.	Fathers more actively involved with their children, in areas of; ● education ● health ● social development ● play. Less conflict between young parents about children's upbringing. Young Asian fathers feel less isolated. Young fathers expressing more confidence in their relationship with their children.	For existing courses and activities at centre consider how they can be made more attractive to young fathers (e.g. timings), and make changes. Provide new 'dads and kids' programme, with sessions such as; ● football ● computer skills, and ● food and cooking. Set up new conflict resolution course for couples, focussing on their roles as parents Create opportunities for fathers to support each other in their role as parents.

Remember!

This step is about good planning generally. Equality issues should emerge naturally at this stage, so long
as you:

● have a clear understanding of the problem
● know the needs of all the people who could use your project, and
● have based what you want to do on what they say their needs are.

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Step 3
How to reach all the possible beneficiaries and enable them to use the project

By this stage, you will have a clear idea about the needs you are trying to address, the people who will benefit from the work, and the kinds of activities you need to offer in order to meet their needs.

The next step is to think about how you will make sure that the people who could benefit from the project know about it and are able to make use of it.

There is a whole range of 'access' issues that you may need to take into account if your target groups are to use your project. Some of these issues will be more relevant to your project than others and some may not apply at all.

It is a very common mistake to think that 'access' just means wheelchair access to a building or venue. In fact, access issues include:

Location
Is your venue close to public transport, in a well–lit area, and in an area that your target groups feel comfortable and safe? If you project is aiming to be inclusive, is the venue in an area that will be recognised as neutral by all communities?

Physical access
Will people using wheelchairs or buggies, or those who find stairs or heavy doors difficult be able to use your venue?

Costs
Can your target groups afford to use your services? Are they free or priced at an affordable rate for the people you are trying to attract?

Communication
Do your target groups have particular communication needs? Do you need to consider information in community languages, providing a signer at events, introducing larger type face publications and notices, working with texting, mobile phone and internet technology with young people? Fit an induction loop system for hearing aid users? Can you use simple language for people with reading difficulties?

Timing of your services
Can people use your services or attend activities at a time that suits them?

Do you need to plan around school holidays, religious festivals celebrated by your target groups, or offer some activities outside office hours? Do you need to take breaks to allow for prayers at various points in the day?

Caring responsibilities
Do any of the people you are targeting need support with their caring responsibilities, for children or for older or disabled family members? Do you need to offer childcare or sitting allowances, provide a crèche or set up sitting circles so that people are free to come to your activities? If you are working with young people, are any of them young carers?

Food and diet
Do you need to take account of different dietary needs amongst your target groups? These might be due to religious or cultural requirements, but could also be about accommodating vegetarians or responding to health needs.

Section 2

Publicity and marketing

What forms of publicity will reach your target groups? What papers do they read? What radio stations do they listen to? Where do they already go to meet, shop, pray, use services? What images make them feel comfortable? If they saw your leaflets or came into your building, would they see images and language that made them feel at home?

People

If people from your target groups came into your premises or came to your events, would they feel welcome and comfortable in the surroundings? Would they see people similar to themselves, as staff, volunteers or users? Would they feel comfortable with the mix of people in the project? Would they feel safe in disclosing details about themselves.

Equality key questions:

▶ What might be preventing people from using your services, and how can you remove the things that make it difficult for them?

▶ How can you go beyond the needs of your existing users?

▶ How can you make sure that all the people who might benefit from your project know about it?

▶ How can you make all your target groups feel welcome and understood in your project?

▶ How can you show in practical ways that you are a project that wants to work with everyone in the community?

▶ How can you demonstrate in your everyday work that you are committed to meeting the needs of people who are disadvantaged in your community?

Section 2

Example: Local family centre

Step 3: Reaching all the possible beneficiaries and enabling them to use the project

Access issue	What we already do	What else would help our target groups?
Physical access	Wheelchair access to ground floor meeting, training and counselling rooms.	Lift to offices on first floor.
Location Issues	Centrally located, close to bus routes.	Consider offering sessions in partnership with local youth groups at their venues.
Financial issues	Subsidised fees for people on benefits.	Negotiate group booking rates for trips out.
	Information leaflet and poster about centre's services in English.	Family centre website, with monthly newsletter, as well as information about services. Produce version of leaflet and poster in main Asian language locally.
Timing of services	Parenting courses run in daytimes and evenings.	Offer 'dads and kids' sessions on Saturdays and Sundays.
Caring	Supervised play sessions for children of people using centre activities.	Encourage centre members to set up mutual sitting circles.
Food and diet issues	Family nutrition covered in parenting courses.	Integrate food and cooking skills into 'dads and kids' sessions.
Publicity and	Information leaflet about project distributed to playgroups and other community projects.	Get local radio to run news items about centre events.
People issues	Users are 80 per cent women. Volunteers are 100 per cent women.	Racial mix is representative of local area, with the exception of Asian communities. Set up links with Asian community project to help us identify how we can involve more parents from Asian communities in our work.

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Taking the time to think through your work in this way will enable you to:

▶ Think in detail about who needs to be able to use your project.

▶ Think about the needs of people and groups who are not using your services at the moment.

▶ Identify practical things you do already that help your target groups to know about your work and use your services.

▶ Identify practical things you could do to make it even easier for your target groups to know about your work and to use your services.

▶ Get real life examples that you can put into your grant application, so that BIG can see you really think about, and are committed to, good equality practices.

Some changes will not cost any additional money,
for example, setting up links with local radio stations to reach particular audiences, or recruiting volunteers from a wider range of backgrounds. Some changes will require funding, for example, installing a lift, translating information or making changes to a website. In this case, you need to identify where
you might generate the funds you need, for example, grant applications; fundraising events; sponsorship from local companies etc. BIG will not fund projects, which are purely associated with increasing disability access, but if

your project includes these costs as a small part of a wider project, these costs will be considered.

If you want to employ a disabled person, you might be able to get funding from the government's Access to Work scheme, which is based in local job centres.

It is a good idea to treat this list as something that you need to review and update at regular intervals.

Remember!

▶ Making your project accessible is about much more than just whether wheelchair users can get into the building.

▶ It is not enough to simply say 'our project is open to all'.

▶ You may not be able to do all the changes you have identified at once. You may need to decide which is the most important and will make the biggest difference.

▶ Many adjustments are about doing things a little differently – do not assume that making changes will cost lots of money.

▶ In your application to BIG include examples of how you can make your project or activities open to potential users.

▶ Some of these issues will be more relevant to your project than others and some may not apply at all.

Section 2

The following case study is taken from a recent application to one of BIG's programmes. It shows an organisation that thought hard about how it could reach out to people who might find it difficult to use
their services. They realised that there were carers who needed support, but would face difficulties due to timing of services, transport problems, culture issues, caring responsibilities, and age. The project they designed addressed all these issues, making the service as accessible as possible to all people caring for someone with a terminal illness.

Good practice case study

Creating a service that everyone can use
A hospice serving a southern English county had recognised that, although it provided top quality care for its patients, it had a very limited focus on their carers. Following consultation, it applied to BIG to develop a new project delivering an all-round package of emotional and practical support to carers. This would include workshops providing advice on lifting and handling, welfare benefits, maintaining their own health and preparing for the future.

Within this overall programme, the hospice identified a number of practical steps it could take to reach those most in need of support:

▶ Transport would be provided for those with mobility difficulties or living in isolated rural parts of the catchment area, by expanding an existing volunteer drivers scheme.

▶ A volunteer sitting service would be created, to free carers up to come to sessions.

▶ A telephone support service would be established, so that people who could not come to sessions could still get professional guidance and talk to other carers.

▶ The hospice already provided information leaflets in Italian, the most common community language locally. They now planned to extend language support by making sure that carers' information was also available in other languages and by using a list of approved interpreters in their work with carers.

▶ The project aimed to broaden the hospice's existing lively volunteer programme to target volunteers from the small minority ethnic communities in the area.

▶ They planned a new partnership with a local young carers' project, to identify and respond to the needs of young carers.

▶ All activities for carers would be free, meaning that no one need miss out for financial reasons.

Section 2

Step 4: exploring management and policy issues

At this stage, you should have a clear idea about the need your project is trying to tackle. You should have a good idea about the kind of activities that will make a difference, and how you can make sure that all the people who might benefit from your project know about it, can make use of it and can be made to feel welcome and understood.

The final equality issue for you to think about is how your project is managed, and the procedures you have in place to ensure that you treat people fairly.

Ensuring your management committee or board of trustees reflect the community

In addition to ensuring that your management committee has the right balance of skills you need to consider whether its membership reflects the kinds of people you are trying to serve. For example, what are the proportion of women and men, different ethnic communities in your community, different ages and disabled and non-disabled people?

Having people who you are trying to serve involved in managing your organisation or project will help you to attract those groups within the community to use your services. It enables their views to be heard and to have a say in how services and policies develop. They are also more likely to see you as an organisation that understands their needs, and values their contribution.

We realise it can be hard to attract people from particular groups onto committees.

Section 2

The following case study is taken from a recent application to one of BIG's programmes. It showed an organisation that had worked hard to make sure that its management committee was representative of the community it served.

This included making sure that there was representation of local minority ethnic groups, but also that the committee had a mix of professionals and non-professionals, and experience in the community alongside experience in health services.

This gave the organisation a huge pool of experience to draw on, as well as credibility with their users and with the professionals they were trying to influence.

Good practice case study

Managing for equality

A community health centre in Glasgow worked in partnership with the local health board and primary care trust to run a community health clinic for people from Black and Minority Ethnic (BME) communities. Its work covered health promotion, advice and treatment in a culturally sensitive environment.

The centre applied to BIG to fund a new project that would allow people from BME communities to take part in the development of local health policy, and to ensure that local health services were developed in a way that reflected the needs of BME communities.

The management committee of the health centre clearly reflected the local community being targeted by the project. Members came from a range of local communities, including people of Arab, Bangladeshi, Indian and Pakistani origins. Their expertise ranged from local community activists through to health professionals, and across the community, voluntary and statutory sectors. This placed them in a strong position to deliver on the relationships, both within the community and with the statutory services, which would make the project a success.

Part of the project being applied for was a BME men's health project, identified as one of the most difficult groups to engage with on health issues. The project set up a separate steering group for this project, again drawing on the communities being targeted. As well as managing a member of staff working on increasing involvement in health policy by BME men, the steering group was given the task of developing a new BME men's health clinic at the centre.

The centre's philosophy was to ensure that the views of all the BME communities locally were listened to, and that their views were translated into action in the delivery of local health policies and services. The integration of these principles into the centre's own management structures provided a strong basis for influencing others.

Section 2

Can I have that in writing? Your equal opportunities policy

Now is the time to check that all of the good practice issues that you have thought about are included in your organisation's equal opportunities policy (EOP). This is the formal document that is:

- a public statement of your organisation's commitment to preventing discrimination, promoting equal opportunities and treating people fairly.

- a summary of the practical ways that you will put equal opportunities into practice in the way that you employ people, deliver services and manage your organisation.

BIG will want to know that you have an equal opportunities policy, and the areas it covers.

A common mistake that organisations make is to think that they can adopt a policy 'off the shelf' or copy one from another organisation. The problems with this approach are:

▶ It is not tailor-made for your organisation and may commit you to things that are not appropriate for your size or type of organisation.

▶ Your organisation will have missed out on the opportunity to think and talk about its equality practices in the process of writing your equal opportunities policy. No-one in the organisation will really feel that they 'own' it, and their commitment to it will be weak.

There is a lot of help available to organisations to help them improve in this area. You may find the following organisations useful:

The Governance Hub - England
Helpdesk: 0800 652 4886
www.governancehub.org.uk

NCVO - England
Freephone helpdesk: 0800 2798 798
www.ncvo-vol.org.uk

SCVO - Scotland Freephone: 0800 169 0022
www.scvo.org.uk

WCVA - Wales Telephone: 029 2043 1700
www.wcva.org.uk

NICVA - Northern Ireland
Telephone: 028 9087 7777
www.nicva.org.uk

Remember!

▶ A diverse management committee will enrich your organisation. It will build links to all parts of your community and bring in new ideas and perspectives.

▶ Your equal opportunities policy is an important statement of your commitment. Do not just adopt someone else's: make it real for your organisation and put it into practice.

Section 3
So now you have got the grant: equality in action

1. The BIG picture: how BIG expects your organisation to implement equality once you have a grant

Congratulations! Your organisation has been awarded a grant from the Big Lottery Fund.

Depending on which programme you have applied for, you may be invited to a meeting or seminar to talk through the outcomes and milestones that you have set out for your project, with a member of BIG's grants staff. If so, you should be prepared to talk about your plans to reach out to disadvantaged groups, the needs that your target groups have, and the plans you have for making your project as open as possible to all the people who could benefit from it.

Every organisation receiving a grant, whether they have a meeting with BIG staff or not, will be sent BIG's standard conditions of grant to sign. These standard conditions include some that relate to equality issues. At the general level, your organisation will be asked to agree that:

During the period of the grant we will act in a fair and open manner without distinction as to race, religion, gender, sexual orientation, age or disability, and in compliance with relevant legislation.

Remember that your organisation will have a number of legal responsibilities relating to employment and service provision. The Law is constantly changing and it's important that you keep up to date. The section on 'The Law and equality' will provide you with an overview of each of the main laws that your organisation currently needs to be aware of.

There will also be specific conditions that commit
your organisation to:

- have an equal opportunities policy in place at
  all times
- monitor the progress of the project and provide information about your activities and beneficiaries
- have all proper employment policies and procedures in place at all times
- pay attention to equality in the recruitment and selection process and the need to ensure an appropriate balance of staff in your organisation
- advertise externally any new posts funded by
  the grant unless an acceptable reason for not doing so can be made and you have received our prior written consent.

The next sections aim to help you through the basics, so that you can be sure you are meeting your conditions of grant.

2. Recruitment good practice

If the grant you have been given includes money to fund the salaries of **new** posts, BIG will always expect you to go through a fair and open

recruitment process. This rule applies even if your organisation is facing a redundancy situation. Under redundancy legislation the employer has to 'consider' whether suitable alternative employment exists. Positions funded by BIG cannot be 'considered' to be suitable alternatives as they are conditional on being openly recruited to.

Recruitment and selection good practice involves meeting the following standards:

▶ There should be a job description for each post funded by the grant, which focuses on the skills and experiences that are needed to do the job.

▶ If you think a post requires an occupational requirement you should provide evidence for this. This will take the form of professional employment law advice that the requirement is valid.

▶ All documents to do with the recruitment process (job description, advert, application form, etc) should be free from any language that discriminates against particular individuals or groups.

▶ The job should be advertised outside your organisation in ways that will reach the people who might apply, including disadvantaged groups. Normally this would mean putting an advertisement in local or national newspapers, unless there were any particular reasons for doing otherwise.

▶ Candidates for the job should be assessed against the skills and experience needed to carry out the tasks in the job description, and not any other issues.

▶ The interview panel should be broadly representative of the people you are trying to reach. If possible, they should have had training in equal opportunities recruitment.

▶ You should keep records of your short-listing process and interviews, so that you can clearly justify why you chose the candidate you did. You must be able to say how they meet the skills and experience required for the job.

3. Keep track of what you do: monitoring for equality

Organisations sometimes complain that monitoring and reporting is a nuisance and that time would be better spent 'getting on with the work'. However, the truth is that good monitoring will help

Remember!

ACAS has regional offices that can provide advice to employers on the whole range of employment issues (www.acas.org.uk).

They also run the Equality Direct helpline for small employers
Tel: 08456 003444

Section 3

you to improve your activities and to manage your project to a high standard as well as meaning you can report back to BIG about the progress of your work.

Good monitoring can help you understand what is going well in your project and also areas where progress may be slow. This will help you focus attention of any problems in the work at an early stage and take action to overcome them. This keeps your organisation on track for delivering a top quality project to the people you are serving.

Monitoring will help you answer a key equality question:

Is everyone who could benefit from it using your project?
Your project may be taking an **inclusive approach** and aiming to offer its activities or services to everyone in the community who could benefit from it. Monitoring will help you spot if there are any obvious 'gaps' in who is using your service. To do this you need to compare the figures you get back from your monitoring with what you know about the make-up of the population you are serving (you should have gathered this statistical information at the planning stage of your project).

It may be that you discover that all is well and that the spread of your users is representative of the groups in your community and the pattern of need. Alternatively, you may see that there is a particular group missing which you

should be reaching. This may point you to an equality issue that your organisation needs to pay attention to.

If your project is taking a **targeted** approach, monitoring will help you check that you are paying attention to other forms of disadvantage that people might be experiencing. For instance, you may be running a project specifically for older people who are socially isolated. But are you reaching those who are disabled, or those on a low income within your target group?

If you are not reaching people in your community who could benefit from your project, monitoring will act as an early warning system. You may need to consult again about their needs, or make changes to your work to enable them to use your services.

Remember that local demographics can change over time. Monitoring can help you identify if there are new potential users that you have not previously been aware of.

What monitoring information will BIG ask for?
The exact monitoring requirements will vary from programme to programme and according to the size of your grant. BIG is very aware that the information it asks for must be in proportion to the amount of money it has given you. So, the bigger the grant, the greater the reporting requirements will be.

Section 3

When you receive your grant, BIG staff will also tell you how often they expect you to report on the progress of your project and what information they expect to get from you.

BIG asks for this information because it needs to be sure that its grants are being well-spent and that it is meeting its aim of supporting projects which bring real improvements to communities and the lives of people most in need.

There are broadly two types of equality monitoring that BIG may ask you to do (you should check with your grant officer If you are unsure which type applies to your project):

Equality monitoring (reporting back at the end of your grant only)

Projects will be required to report back against some standard equality categories, at the end of the period of grant. BIG uses this information to judge how far its programmes are reaching particular groups in society.

Equality monitoring (reporting back throughout your grant)

At the beginning of their grant, projects will be required to estimate the percentage of people who will benefit from their project against some standard equality categories and what evidence they've based their estimates on. Projects will also be asked to say how they will collect evidence throughout their project to show the percentage of people who have benefited under the same equality categories.

At the end of each year, projects will be asked to tell us what they did to make sure that everyone who could benefit from their project knew about it and was able to use it or get involved. They will also be asked to give the percentage of people who benefited from their project under the same standard equality categories and back this up with evidence. Lastly, projects will be asked to tell us how effective they think

Remember!

It is not enough just to collect the numbers. You then need to look at them in relation to:

- the aims of your project and the outcomes you want to achieve, and
- the make-up of your community.

You should use the monitoring information to help you improve your work, not just report to BIG

More help with understanding how to monitor and report on progress towards your outcomes is available in the BIG publication: 'Getting Funding and Planning Successful Projects: BIG's Guide to Outcomes', which is available at http://www.biglearningzone.org.uk/ .

they were in making sure that everyone who could benefit from their project knew about it and was able to use it or get involved, and if they need to, what they'll do differently in the next year.

At the end of their grant, projects will be asked similar questions, but instead of asking projects what they'll do differently next year, we'll ask what they've learned over the lifetime of their project.

BIG has produced a resource to help projects meet these requirements: Equality Information guide for grant holders' which is available at http://www.biglotteryfund.org.uk/index/grant-uk/equality-information.htm

Further support A
The law and equality

This section gives a brief overview of each of the main equality laws that your organisation needs to be aware of. In each case, we give a summary of what the law says and in some cases we indicate implications for voluntary organisations. Please be aware that the law changes frequently; every effort has been made to make this information correct at the time of going to print, October 2011.

This section is not a definitive guide to the law. You should seek specialist legal help for any specific legal issues or problems. Details of agencies that can give more information or advice are included in each section.

Some legal terms and concepts are consistent across most of the equality laws: the most important follow.

Direct discrimination – this means treating one person less favourably than another in similar circumstances on grounds of race, sex, gender re-assignment, marital or civil partnership status, pregnancy and maternity, disability, age, sexual orientation or religion or belief. It is the fact of the less favourable treatment that matters; the intention of the person discriminating is irrelevant. Direct discrimination could occur when an employer appoints a man rather than a better qualified woman, or when a project for young people, after an incident involving boys of different racial groups, excludes only the black boys.

Associative discrimination – this is direct discrimination against someone because they are associated with another person on the basis of their race, sex, gender reassignment, marital or civil partnership status, pregnancy and maternity, disability, age, sexual orientation or religion or belief. Associative discrimination could occur if an individual was refused a place at a playgroup (which operated a policy of automatically offering places to siblings) because the group was concerned that the individual's brother (who had celebral palsy) would be a burden to look after.

Discrimination by perception – this is direct discrimination against someone because others think they share a particular race, sex, gender reassignment, marital or civil partnership status, disability, pregnancy and maternity, age, sexual orientation or religion or belief, whether or not they actually have the characteristic. This could occur if a charity refused to serve someone on the perception that they were Muslim, even if the individual was of another religion or belief (or no religion or belief).

Indirect discrimination – this means applying to everyone a provision or practice, a criterion, a formal or informal rule, which appears to be 'neutral' but which has the effect, whether

intentionally or not, of putting some groups or individuals of a particular race, sex, gender re-assignment, marital or civil partnership status, pregnancy and maternity, disability, age, sexual orientation or religion or belief at a disadvantage compared to others, if the provision, practice, criterion cannot be justified as a proportionate way of achieving a legitimate aim.   Indirect discrimination could occur when an organisation proposes to limit beneficiaries of a project to people who have lived in a specific area for at least five years, which is likely to disadvantage groups that have settled there more recently including a group of refugees from Somalia and a group of families from Poland. It could also occur when an employer requires five years' experience for a simple administrative job, which is likely to disadvantage young people who could otherwise do the job.

Victimisation – this means treating a person less favourably because they have made a complaint of unlawful discrimination or have supported or given evidence in a complaint of discrimination or are thought to have done so or to be intending to do so. Victimisation could occur if an employer excludes from certain benefits an employee who complained that a work colleague was being harassed because he is gay.

Harassment - this means subjecting another person to unwanted conduct related to race, sex, gender reassignment, marital or civil partnership status, pregnancy and maternity, disability, age, sexual orientation or religion or belief that has the purpose or effect of violating their dignity or creating for them an or in any way distressing. It may be intentional obvious bullying or graffiti or physical or sexual assault, but it can also involve unwanted nicknames, jokes or other behaviour not necessarily intended to be offensive. It can be a one-off incident, or ongoing. Harassment could occur when racist remarks are made to a white woman who is known to have a mixed-race child or when a Muslim man is constantly subjected to irrelevant questions about his religion.

Discrimination arising from disability – this means treating a disabled person unfavourably because of something connected with their disability and the unfavourable treatment cannot be justified. This is different from direct discrimination which occurs when a disabled person is treated less favourably because of the disability itself. This could occur if a child (who had a disability which meant he didn't have full control of his bowel movement) was refused admission to a crèche because of his incontinence (rather than because of his disability).

Liability of employers – equality law makes an employer liable for the acts of unlawful discrimination or harassment by their employees when they are acting in

the course of their employment, whether or not the employer knew or approved, unless the employer can show that they took reasonably practicable steps to prevent the discrimination or harassment.

Positive action - equality law encourages employers and service providers to take action that may involve treating one group more favourably, where this is a proportionate way to help members of that group overcome a disadvantage or participate more fully, or in order to meet needs they have that are different from the population as a whole. This is known as positive action and it applies to any of the groups of people who share a particular race, sex, gender reassignment, marital or civil partnership status, pregnancy and maternity, disability, age, sexual orientation or religion or belief.

Examples of positive action include:

- encouraging applications from under-represented groups for jobs and for promotions
- targeting advertising to reach under-represented groups
- promoting employment opportunities at job-fairs, open days and other events likely to be attended by members of under-represented groups
- offering training for particular work for members of groups under-represented among people doing that work

- offering English language classes for women in immigrant communities so they are better able to access local welfare services
- providing mobile ante-natal clinics that could visit Gypsy and Traveller communities where infant mortality rates are disproportionately high.

Positive action or preferential treatment to benefit disabled people is always lawful.

Occupational requirement – where the nature of a job or the context in which it is carried out makes being of a particular race, sex, gender reassignment, marital or civil partnership status, disability, age, sexual orientation or religion or belief is a genuine and determining requirement for that job then an employer may discriminate on such grounds in recruitment, selection, promotion and/or dismissal, provided that the requirement is a proportionate means of achieving a legitimate aim. Being an Asian woman could be an occupational requirement for a counsellor in a refuge for Asian Women victims of domestic violence, but being an Asian woman would not normally be an occupational requirement for the finance officer of the refuge.

Location	Relevant laws	Main provisions	Organisations that may be able to provide more information / help in relation to the law
England, Scotland and Wales	**Equality Act 2010**	The Act brings together, updates and strengthens discrimination law. In general terms, it prevents discrimination on the grounds of: ● age ● disability ● gender reassignment ● marriage and civil partnership ● pregnancy and maternity ● race; ● religion or belief ● sex; or ● sexual orientation. These categories are known in the Act as protected characteristics. The Act makes it illegal to discriminate against anyone with a protected characteristic in the workplace, when providing goods, facilities and services, when exercising public functions, in the disposal and management of premises, in education and by associations (such as private clubs). The Equality Act sets out the different ways in which it is unlawful to treat someone, such as direct and indirect discrimination, harassment, victimisation and failing to make a reasonable adjustment for a disabled person. The Act also introduces a new public sector equality duty which places a general duty on public bodies in carrying out their functions to: ● eliminate unlawful discrimination, harassment and victimisation, ● actively promote equality of opportunity between people of different groups and foster good relations between them also. It can apply to private and voluntary organisations if they are providing public services, for example under contract to a local authority. The main public authorities must also publish their equality objectives as well as information which demonstrates how they are complying with the duty.	**The Equality and Human Rights Commission** http://www.equalityhumanrights.com/ England: 0845 604 6610 Scotland: 0845 604 5510 Wales: 0845 604 8810 **NCVO** www.ncvo-vol.org.uk Freephone Helpdesk: 0800 2 798 798 **ACAS** www.acas.org.uk Equality Direct helpline for small employers Tel: 08456 003444

Location	Relevant laws	Main provisions	Organisations that may be able to provide more information / help in relation to the law
Northern Ireland only	**Sex Discrimination Order 1976 (NI)**	Makes it illegal to discriminate on grounds of sex or marriage in: ● recruitment (unless there is a "genuine occupational requirement") ● treatment at work (e.g. access to training) ● dismissal. Makes it illegal to discriminate on the grounds of sex in the provision of goods, facilities or services to the public. Bans harassment at work or in vocational training.	**Equality Commission for Northern Ireland** Tel: 028 90 500 600 Textphone: 028 90 500 589 www.equalityni.org
	The Race Relations Order 1997 (NI)	Makes it illegal to discriminate against anyone on grounds of race, colour, nationality, or ethnic or national origin. All racial groups are protected from discrimination. Applies to: ● employment ● planning ● housing ● the provision of goods, facilities and services, and ● education.	

Location	Relevant laws	Main provisions	Organisations that may be able to provide more information / help in relation to the law
	Northern Ireland Act 1998 Section 75	Public authorities must promote equality of opportunity between people of different ● religious belief ● political opinion ● gender ● racial group ● age ● marital status ● sexual orientation and between ● persons with a disability and persons without ● people with dependents and without. These are commonly referred to as the nine equality categories. They must also promote good relations between people of different religious belief, political opinion and racial group.	
	Fair Employment and Treatment Order (Northern Ireland) Order 1998 (FETO)	Makes it illegal to discriminate on the grounds of religious belief and/or political opinion in: ● employment ● provision of goods, facilities and services ● sale and management of land and property ● further and higher education. FETO applies throughout the employment relationship. It also makes employers liable for acts of discrimination committed by their employees. Charities providing benefits to people of a particular religious belief or political opinion are exempt.	

Location	Relevant laws	Main provisions	Organisations that may be able to provide information/help in relation to the law
Scotland only	**Gaelic Language (Scotland) Act 2005**	This set up a Gaelic Language Board (Bord na Gaidhlig) to promote the use and understanding of the Gaelic language. The Bord is required to develop a national Gaelic language plan, setting out how it intends to achieve its aims The Act also gives the Bord the power to require public authorities to prepare and implement Gaelic language plans, showing how they will use the language in carrying out their work Voluntary organisations are not specifically covered by the Act.	**Bord na Gaidhlig (Gaelic Language Board)** Tel: 0 1463 225454 www. Bord-na-gaidhlig.org.uk
Wales only	**Welsh Language Act 1993**	Requires that in public business and the justice system in Wales, the Welsh and English languages should be treated on a basis of equality. The Act also introduced the concept of Welsh language schemes. A scheme is a document setting out how a public body plans to develop Welsh language provision in: ● service delivery and planning ● dealing with the Welsh speaking public ● the organisation's public image. NB. May apply to voluntary sector organisations if contracted to provide public services. Over and above this, a number of voluntary organisations prepare and implement schemes as an expression of their commitment to diversity and to serving the needs of Welsh speakers and non-Welsh speakers alike.	Welsh Language Board Tel: 029 2097 8000 www.bwrdd-yr-iaith.org.uk

Equality Matters

Further support B: Jargon buster

Every field of activity develops its own 'special language' and technical terms. The terms used in equality work draws on specialist language from:

- project management
- social policy
- employment and equality law.

This section sets out some of the most commonly used terms and what they mean in the context of BIG's aim to promote equality through the projects we support.

Some of the terms in this section are legal terms, in which case there is also a cross-reference to the previous section on Law and Equality.

The definitions set out below should not be relied on in relation to any legal question or matter, when advice from a suitable specialist agency should be sought (please see the Law and Equality Chapter for details).

Access issues
The wide range of matters that should be considered to make it possible for different types of people to know about a service, make use of it, and feel welcome. Access, which involves more than physical access for wheelchair users, can include meeting communication or other needs of people with different disabilities or of groups with cultural or language differences.

Activities
The actions, tasks or work that a project or organisation carries out to achieve its aims.

Aim
Why a project or organisation exists and the difference it wants to make. Aims can be overall or specific.

Beneficiary
Someone who benefits from a project.

Black and minority ethnic (BME)
A term which is generally used to refer to people who belong to a visible racial minority or an ethnic group that is not a dominant group in the UK.

Disadvantage
People having fewer opportunities than most people in the society around them in respect of one or more aspects of their lives, for example, education, health or employment, or having a poorer quality of life compared to those around them. Disadvantage can be a result of many different factors in people's lives, which may reinforce each other. Disadvantage is often linked to poverty; it may be a result of patterns of discrimination or exclusion; it may derive from other kinds of differences among people. Disadvantage varies from community to community and within communities.

Disability
(Please see the Law and Equality section)

For the purpose of current equality legislation disability is a physical or

mental impairment that has a substantial and long-term adverse effect on a person's ability to carry out normal day-to-day activities. This can cover people with a wide range of impairments, including but not limited to:

- People with long-term health conditions, such as diabetes.
- People with progressive conditions, such as motor neurone disease.
- People who have been diagnosed with HIV, cancer and multiple sclerosis.
- People with learning disabilities.
- People with mental health conditions.
- People who have mobility impairments
- Blind and partially-sighted people.
- Deaf and hearing-impaired people.

People who are 'disabled' for purposes of benefits or services may not necessarily come within the above definition, and people within this definition will not automatically qualify for specifically designated benefits or services.

Direct discrimination

(Please see the Law and Equality section)

Treating one person less favourably than another in similar circumstances on grounds of race, sex, gender re-assignment, disability, age, sexual orientation, religion or belief, or marital or civil partnership status.

Diversity

Recognising and valuing the differences that exist in the factors that make up people's identity, such as sex, race, ethnicity, physical and mental ability, sexuality, gender identity, age, economic status, language, religion, nationality, education and family status. By drawing on these differences, diversity will stimulate fresh ways of thinking, broaden people's outlooks and enable every individual to contribute to their community, or to a particular activity or organisation.

Equality

Where each person in relation to a particular aspect of their lives has equal rights, freedoms and opportunities and where their different needs are recognised and barriers are removed

Equality monitoring

Collecting information about how well a project is meeting or has met its equality aims. Equality monitoring is carried out in order to report to BIG on who has used the project or work that BIG has funded. It also can help an organisation to know where it needs to make changes in its employment or service delivery policies or practices.

Equal opportunities

Ensuring that there are no barriers based on irrelevant factors, such as sex, gender assignment, ethnicity, disability, sexual orientation, age, religion or belief, pregnancy and maternity or marital or civil partnership status that prevent

people from securing employment or having full access to services.

Equal opportunities policy
A document setting out how an organisation will prevent discrimination and encourage equal opportunities in the way it employs people and provides services and in the way in which it is managed.

Ethnicity or ethnic origin
Describes the bond between people with a shared history, sense of identity, geography and cultural roots. It can include, but is much wider than, someone's racial origin.

Ethnic group
A group of people who have the same ethnicity/ethnic origin.

Evaluation
Using monitoring and other information to make judgments on how an organisation, project or programme is doing based on agreed criteria or outcomes. Evaluation can be done externally or internally. (See self-evaluation).

Gender
Gender refers to the social dimension of being male or female and the differences that have been learned, are changeable over time and may vary widely both within and between cultures.

Harassment
(Please see Law and Equality section)

Unwanted behaviour, not necessarily intentional, ranging from jokes or graffiti to physical assault that undermines a person's dignity or creates an offensive, frightening, humiliating or distressing environment.

Inclusive approach
Providing activities or services for the whole community and taking action to make sure that all individuals and groups know about and can use the service or participate in the project, are made to feel welcome and are treated fairly (see also Access issues).

Indirect discrimination
(Please see Law and Equality section)

Applying a criterion, policy, formal or informal rule or any other practice, which appears to be 'neutral' and is applied to everyone, but which has the effect of disadvantaging people of one particular group compared to others. Whether it is intentional or not, indirect discrimination is illegal if the criterion, policy etc. cannot be justified as a proportionate way of achieving a legitimate aim.

Milestone
Particular planned achievement or key event that marks a clear stage in the progress of a project.

Monitoring
The routine, systematic collection and recording of information about a project, mainly for the purpose of checking its progress against its plans.

Multiple discrimination

Discrimination against a person on more than one ground, for example treating a black woman less favourably than a white woman or a black man in similar circumstances.

National origins

The nation or country to which a person identifies by birth or descent or cultural, language or other ties. It is not necessarily the same as legal nationality and includes, for example, Scottish, Welsh and English national origins.

Nationality

The legal relationship between a person and a country of which they are recognised as having full citizenship rights. Nationality may be granted as of right by reason of place of birth or parents' nationality or by a process of naturalisation.

Occupational requirement (OR)
(Please see the Law and Equality section)

Selection, promotion or dismissal on grounds of a particular race, sex, gender re-assignment, sexual orientation, disability, marital or civil partnership status, pregnancy and maternity, religion/belief or age may be allowed for certain jobs where because of the nature of the job or the context in which it is carried out being of particular race, sex etc. is an occupational requirement for that job.

Outcomes

The changes, benefits, problems, learning or other effects that happen as a result of the services or activities provided by an organisation.

Positive action
(Please see Law and Equality section)

Measures that are allowed in limited circumstances to prevent or compensate for disadvantages linked to race, sex, gender re-assignment, marital and civil partnership status, pregnancy and maternity, disability, age, sexual orientation or religion or belief. Positive action encourages employers and service providers to take action that may involve treating one group more favourably, where this is a proportionate way to help members of that group overcome a disadvantage or participate more fully, or in order to meet needs they have that are different from the population as a whole. There are no restrictions on positive action of any type to benefit disabled people.

Reasonable adjustments
(Please see Law and Equality section)

Making relevant changes to premises, forms of communication, organisation of work or the ways services are provided to enable disabled people to be employed or to have access to information and services. What is 'reasonable' will depend on the circumstances, including the size and resources of the organisation and the nature of the employment or services.

Religion or belief

Refers to a person's religion or lack of religion or a person's religious belief or similar philosophical belief or lack of such belief.

Self-evaluation

A form of evaluation in which people within an organisation make judgments about their organisation's performance towards meeting its aims and objectives. This is done as part of project management.

Service providers

Businesses and public, private or voluntary sector organisations that provide services to the public with or without a fee or charge. They include shops, banks, restaurants, leisure centres, pubs and clubs, accountants, post offices, the police, the courts, local authorities, the health service, and many voluntary organisations.

Sexual Orientation

Being heterosexual, homosexual or bi-sexual.

Social exclusion

A short-hand term describing circumstances of individuals, groups or communities that are unable to participate fully in public life or to enjoy the benefits available generally within the society. It is often based on linked problems such as unemployment, poor education or skills, low incomes, poor housing, bad health and family breakdown.

Social cohesion/community cohesion

A situation in which:

- everyone has a strong sense of belonging
- people have similar life opportunities whatever their background
- cultural and other differences between people are valued and appreciated
- and strong and positive relationships exist between people of different backgrounds.

Target

A level of achievement which a project or organisation sets itself to reach in a specified period of time.

Targeted approach

Designing and providing a service or activity for a particular group. A targeted approach may be adopted when a group has particular needs that cannot be adequately met within a general service that is open to everyone.

Victimisation

(Please see Law and Equality section)

Treating someone unfairly because they have made or supported a complaint of unlawful discrimination or harassment or because they are thought to have done so or to be about to do so. Victimisation is treated as a form of unlawful discrimination.

Equality Matters
Further support C: Equality planning charts

Making your application to BIG

The charts that follow are designed to help you think about equality issues when planning your project.

You do not have to do this all in one go. You may find it better to tackle one step at a time – but it is important to complete one step before tackling the next, as they build on one another.

We have provided the charts as a suggested approach, but it is not compulsory to complete them and you are not required to submit this information with your application.

Top equality tips

▶ Think about equality issues throughout your application, not simply as an 'add on'.

▶ Make the connection between the disadvantage in your community and how your project will tackle it

▶ Think beyond the needs of your existing users. How can you make sure that people with different kinds of needs can use your project or work for you in the future?

▶ Give concrete, real–life, examples of how you apply equality in practice. Do not just say that you have an equal opportunities policy – use the charts you have filled in to give BIG examples of how you apply your policies in your day-to-day work.

▶ Do not assume that because you are working with one particular disadvantaged group that you have met all your equality obligations. You may be working with young people leaving care, but are you also addressing the needs of those of them who are disabled, or who are parents themselves?

Step 1: understanding the need and your beneficiaries

What is the need?	Who could benefit from the project?	Are we already in touch with them?	How can we find out what they want?	What have they told us about their needs?
A brief description of the problem you want to tackle. Be specific.	Describe the people who could be helped by your project. Think about your whole community, not just the people you already know. Do any groups face particular disadvantage?	List potential users that you already work with and potential users you do not currently work with.	Think creatively about how you can consult all types of potential user. Think especially hard about the ones you are not already in contact with. These will help you decide what activities will make a difference.	Fill in four to six key issues that have come out of your consultation with potential users.

Tip:
Use the information you put into this chart to help you answer BIG's questions about:

● project need ● project beneficiaries.

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Step 2: Being clear about your aims, outcomes and what you want to do

What difference do we want to make? (overall aim)	What are the main changes we want to bring about? (intended outcomes)	What will we do to make this happen?(activities)
This should include what the problem is and the overall difference you want to make. Keep it simple.	Identify up to six changes that will happen as a result of your project. Use words of change e.g. "more", "less" "better" "improved".	These are your tasks, services or activities. Be specific and make sure they relate to the needs you have identified and the changes you want to make. Use words of action such as to provide, to set up, to run, to create, to produce and so on.

Tip:

Use the information you put into this chart to help you answer BIG's questions about:

- project summary
- project outcomes
- project delivery method or "what you plan to do".

Step 3: How to reach your target groups and enable them to use the project

Access issues The things that may put people off or cause problems for people who could use your project.	What we already do Think in detail of ways in which you already try to remove barriers. These are things you can tell BIG you do in your everyday work.	What else would help our target groups? Think in detail about how you could remove barriers you identify in column 1. These are things you can tell BIG you plan to do in future to make your project accessible.
Location		
Physical access		
Costs		
Communication		
Timing of services		
Caring responsibilities		
Food and diet		
Publicity and marketing		
People		

Tip:

Use the information you put into this chart to help you answer BIG's questions about:

- project beneficiaries
- project delivery method or "what you plan to do"
- equal opportunities
- project outcomes.

Equality Matters
Further support D: Key contact details

England
Equality and Human Rights Commission Helpline

Equality and Human Rights Commission Helpline
Freepost RRLL-GHUX-CTRX
Arndale House
Arndale Centre
Manchester
M4 3EQ.

0845 604 6610 – England main number
0845 604 6620 – England textphone
0845 604 6630 – England fax

Mon, Tue, Thu, Fri 9:00 am–5:00 pm;
Wed 9:00 am–8:00 pm (last call taken at 7:45pm)

Wales
Equality and Human Rights Commission Helpline Wales

Freepost RRLR-UEYB-UYZL
1st Floor
3 Callaghan Square
Cardiff
CF10 5BT.

0845 604 8810 – Wales main number
　　　　　　　(bi-lingual service)
0845 604 8820 – Wales textphone
0845 604 8830 – Wales fax

Mon, Tue, Thu, Fri 9:00 am–5:00 pm;
Wed 9:00 am-8:00 pm (last call taken at 7:45pm)

Scotland
Equality and Human Rights Commission Helpline Scotland

Freepost RRLL-GYLB-UJTA
The Optima Building
58 Robertson Street
Glasgow
G2 8DU.

0845 604 5510 – Scotland main number
0845 604 5520 – Scotland textphone
0141 228 5912 – Scotland fax

Mon, Tue, Thu, Fri 9:00 am–5:00 pm;
Wed 9:00 am–8:00 pm (last call taken at 7:45pm)

Northern Ireland
Equality Commission for Northern Ireland

Equality House
7-9 Shaftesbury Square
Belfast
BT2 7DP.

028 90 500 600 – main number
028 90 500 589 – textphone
028 90 890 890 – enquiry line
028 90 248 687– fax

Email : information@equalityni.org
Online enquiry form: see www.equalityni.org

ACAS
www.acas.org.uk

Equality Direct helpline for small employers
Telephone: 08456 003444

See Tackling Discrimination and Promoting Equality: Good Practice Guide for Employers