

## **PAN Trustees (PAN) – Equality Diversity and Inclusion (EDI) - March 2024**

PAN is committed to encouraging equality, diversity and inclusion, and ensuring we have no unlawful discrimination. The aim is for PAN to be a diverse organisation within the bounds of a small organisation, and for each Partner/employee to feel respected and able to give their best.

The organisation, in providing services to clients, is also committed against any unlawful discrimination of Partners/employees, clients or the public (usually in the guise of being a member of a pension scheme we look after) .

This paper sets out in relation to Equality Diversity and Inclusion (EDI) our;

- Policies Purpose;
- Policies; and
- Demonstrable approaches and actions.

### **Our Policy's purpose**

This policy's purpose is to:

1. Provide equality, fairness and respect for all our people, whether permanent, temporary, part-time or full-time.

2. Not unlawfully discriminate because of:

- age
- disability
- gender reassignment
- marriage and civil partnership
- pregnancy and maternity
- race (including colour, nationality, and ethnic or national origin)
- religion or belief
- sex
- sexual orientation

3. Oppose and avoid all forms of unlawful discrimination. This includes in:

- pay and benefits
- terms and conditions of employment
- dealing with grievances and discipline
- dismissal
- redundancy
- leave for parents
- requests for flexible working

- selection for employment, promotion, training or other developmental opportunities.

## **Our Policies**

PAN commits to:

1. Encourage equality, diversity and inclusion in the workplace as it is good practice and makes business sense, as well as just being the right thing to do.
2. Create a working environment free of bullying, harassment, victimisation and unlawful discrimination, promoting dignity and respect for all, and where individual differences and the contributions of all staff are encouraged, recognised and valued.

This commitment includes making all staff aware of their rights and responsibilities under this equality, diversity and inclusion policy. Responsibilities include staff conducting themselves to help the organisation provide equal opportunities in employment and partnership, and prevent bullying, harassment, victimisation and unlawful discrimination.

3. Take seriously complaints in the course of PAN's work activities. These are to be judged solely on their merits.
4. Make opportunities for new business, training, development and progress available to all, who will be helped and encouraged to develop to their full potential, so their talents and resources can be fully utilised to maximise the efficiency of the organisation.
5. Make decisions concerning staff based on merit.
6. Review employment and partnership practices and procedures when necessary to ensure fairness, and also update them and this policy to take account of changes in the law.
7. Consider the make-up of the workforce regarding information such as age, sex, ethnic/educational background, sexual orientation, religion or belief, and disability in encouraging equality, diversity and inclusion, and in meeting the aims and commitments of PAN as an organisation. In a small organisation, there will inevitably be limitations. However, these should not be a barrier to open approaches.
8. Ensure that all opportunities for Trustee appointments are open fairly and openly to all Partners.

## **Agreement to follow this policy**

The Policy will be owned by the Partnership as a whole, with the Chief Operating Officer having specific responsibility for implementation, and regularly reviewing and reporting to the Partnership Board.

## **Demonstrative approaches and actions**

### **Key Features**

- **We value all contributions**
- **We recruit irrespective of background**
- **Diversity is a valued commodity**
- **We operate an inclusive culture**
- **Our staff are from a variety of backgrounds**

#### **1. Consider gender pay inequality/equality**

Being open and honest about any gender pay gap in PAN. Partners' terms are set equitably across the Partnership irrespective of gender.

#### **2. Being aware of unconscious bias**

Unconscious bias is a real issue to making progress in increasing diversity and inclusion in the finance industry. PAN are fully aware of this, particularly in recruitment.

#### **3. Acknowledge religious and cultural holidays**

PAN adopts a flexible approach to holidays and enabling employees to have days off to observe and celebrate religious holidays and events will demonstrate inclusion as a core company value.

#### **4. Encourage frequent feedback**

Partners, and the management team in particular, are encouraged to listen rather than talk when employee feedback is being given.

Partners should be able to feedback openly and respectfully at Board Meetings or directly to the management team.

Feedback can also come externally and should be encouraged to improve the service provided by PAN.

#### **5. Be aware of ageism (both ways)**

The nature of what we do lends itself to being 'experienced'. A blend of ages and views will support PAN produce a more rounded approach both to business matters and the operation of the business.

#### **6. Have an anti-discrimination approach**

There is no place for discrimination of any kind in any workplace. PAN has a process for raising such matters that is robust but to date, fortunately, has not been tested.

### 7. Celebrate difference

PAN accepts everybody as they are which we believe is how we should be to make all feel welcome in the organisation.

### 8. Collective responsibility

PAN hold each other and leadership accountable for implementing, seeing through, and continuously striving to improve diversity and inclusion efforts. This is powerful because it prevents diversity and inclusion from being merely a tick-boxing exercise. Upholding inclusion as a core value in itself breeds inclusivity because of collective responsibility.

#### VERSION CONTROL

Version Number	Date Approved	Brief Description	Change Author	Approver
1.0	07/03/2024	Policy	Raymonde Nathan	N Chadha