Learning & Skills Council

An Association for Equality & Diversity Practitioners

A Focus Feasibility Study, March 2007

FOCUS CONSULTANCY

Equal

EUROPEAN UNION
European Social Fund

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EXECUTIVE SUMMARY

The Learning and Skills Council (LSC), as part of its EQUAL programme, commissioned Focus Consultancy Limited to design and conduct a study to

1. Understand better the nature of the Equality & Diversity (E&D) field in relation to demographics, activities and needs;
2. Establish the required scope, function and role of an association;
3. Identify the potential benefits and any risks in establishing an association in relation to improving diversity within the UK;
4. Set out a competency framework that will help to ensure high standards of practice amongst E&D Practitioners.

A questionnaire was designed and piloted by Focus and issued to a non-random convenience sample of 1,500 E&D Practitioners via post, email and the LSC website. Of these, 210 fully completed questionnaires and 171 demographic monitoring forms were returned and analysed.

In addition to this quantitative approach, qualitative data was gathered from a small cohort of key experts and semi-structured interviews were held with 25 such individuals.

The main findings of the study were:

- E&D Practitioners are, in the main, of White British origin, female and aged between 35 and 54.

- They have high levels of educational, vocational and professional training and the majority work in-house in the public sector and cover multiple strands of E&D.

- A large minority believe that they lack enough training to carry out their role sufficiently.

- Many E&D Practitioners rely on a mix of "on-the-job" formal and informal channels, such as attending workshops and downloading information from the Internet.

- The most important competencies and skills required for professional and proficient E&D practice were social and interactive skills and the least important commercial knowledge.

- Within the context of a competency framework, this translates, for the proficient practitioner, as a reflective personality that seeks to understand the set of assumptions and prejudices that orientate their own behaviour and the behaviour of those around them.

- Support for some kind of professional association was very high and all practitioners, regardless of their career stage or background, believed that they would benefit from such an association so long as their needs are met.

- Support for an open or vetted membership association was almost equal with supporters for an open association highlighting the ideological underpinnings of E&D while supporters for a closed association highlighted the professional importance of maintaining standards.

- Educational training and work experience would perhaps be the most valid criteria upon which to establish eligibility for membership but the shortfall in existing suitable training courses currently makes this difficult.

- Given the current myriad of routes into and through E&D, no obvious career path can be identified. However, an association could play a vital role in establishing standardised forms of access to professional development and defining an E&D Practitioner "career path".

- Supporters of an association would like to see a range of information-sharing and professional development-type services and functions.

- Support for membership fees was low, although the majority did not know if they would be prepared to pay. Organisational and corporate sponsorship would also, therefore, have to be considered. Full members would expect to pay between £100 to £200 per annum depending on services offered.

- Although the CEHR would be the most obvious candidate for regulating an association, partisanship issues make this difficult and so a separate body of leading experts might, then, be preferable.

In addition to the planned outcomes, a number of unplanned considerations surfaced. As with any good research project, more questions were raised than answers produced. This is especially true in relation to the key issue of competencies and the professionalisation of E&D that was found to be contentious for a number of reasons. With this in mind, the following recommendations are suggested:

- Wider consultation with practitioners should be undertaken on

  - the value and benefits of accrediting individual practitioners as competent and fit to practice,

  - the issue of exercising a regulatory function over the sector and

  - the operational and professional relationship between the association and the CEHR.

- A two-staged process of membership be offered; the first being an open membership, whereby for a nominal fee access to information and support services are offered and the second should be in the form of a "commitment to quality" assurance certificate that can be awarded on the basis of a simple level of work experience and support from a line manager or significant client.

1. Introduction

Aims

1.1. The Learning and Skills Council (LSC), as part of its EQUAL programme, commissioned Focus Consultancy Limited to design and conduct a study "to establish the feasibility of a professional body for LSC Equality and Diversity Practitioners in the UK". The core objective of the study was to establish whether there is an identifiable and justifiable need for setting up such an association and to identify the essential competencies for practice in this area.

1.2. Specifically, the study was to:

1. Understand better the nature of the E&D field in relation to demographics, activities and needs;
2. Establish the required scope, function and role of an association;
3. Identify the potential benefits and any risks in establishing an association in relation to improving diversity within the UK;
4. Set out a competency framework that will help to ensure high standards of practice amongst Equality & Diversity (E&D) Practitioners.

1.3. Aims 1, 2 and 3 were investigated through the administration of a questionnaire to a convenience sample of the E&D Practitioner population. Twenty leading individuals within the field were also interviewed. Aim 4 was investigated through the questionnaire and interview research, plus extensive background research. Background research also helped to contextualise findings relating to the first three aims.

Objectives

1.4. The objective "improving diversity within the UK" referred to both improving E&D within the workplace and helping to overcome social exclusion through the way in which public, private and voluntary organisations deliver their products and services. "Diversity" was taken as an inclusive term for each of the areas currently covered by UK legislation: race, religion and belief, gender, age, sexual orientation and disability.

1.5. The study was designed and conducted to answer the following questions:

- What are the personal and professional characteristics of the potential membership of an association?

- What are the different types of E&D roles/jobs currently being undertaken across different sectors?

- What training do people working in E&D currently have?

- What competencies and skills should people working in E&D have?

- How does this differ by employment context within single or multiple sectors?

- Where do people working in E&D currently access formal and informal diversity related training and development and how do they make their decisions of which providers/sources to use?

- What gaps currently exist in their skills and what difficulties or challenges is this currently posing?

- How should the career path for E&D Practitioners be defined?

- What levels of support exist for a practitioners association?

- Who expects to benefit?

- What are the advantages and disadvantages of different models of existing professional organisations?

- What are the advantages and disadvantages of different existing models of accreditation that exist amongst established professional organisations?

- Should existing training courses seek accreditation status? Should new accredited training be offered?

- What services and functions should an association provide?

- What membership fees, if any, are regarded as good value for money? What alternatives might there be to membership fees?

- What mechanism should be put in place to maintain an overview of new E&D resources and to ensure that these meet the national competencies?

Background

1.6. The importance of the study in establishing the feasibility and desirability of a professional body for E&D Practitioners in the UK cannot be overstated. The enormous proliferation of Practitioners in the field over the last ten years, ranging from the excellent to, frankly, the "bandits", has been staggering.

1.7. When Focus Consultancy Limited (Focus) was established in 1986, only a handful of practitioners worked as what are today called "E&D Practitioners". At that time, these individuals worked mainly in the race relations field as internal advisors to Local Authorities. Since then, ideological and professional transformations have led to the development and diversification of anti-discrimination precepts and practice and the establishment of what has become the "Equality and Diversity" field. The field today covers multiple sectors and holds multiple aims, not all of which are in agreement. As a consequence, the areas covered and the specific markets for the services of Practitioners have expanded. Individual specialists and formal bodies in the gender, sexual orientation, faith, age and disability fields now complement those in the race and ethnicity fields. Individual consultants have combined to form practices or companies working in one or more of these fields. And with the increase in legislation, the whole E&D area of concern has become a mandatory part of public and private sector corporate life.

1.8. In fact, since the "business case for diversity" – coupled with an increased interest in policies and practices of corporate social responsibility – has caught the commercial imagination and particularly that of the multinationals, the number of E&D Practitioners based in the private sector has grown considerably. A recent survey, undertaken by Focus and published by the European Union, *The Business Case for Diversity: Good Practice in the Workplace[1]*, begins to suggest that, as the various European equality directives begin to bite, this growth will accelerate rapidly in the next decade.

1.9. Similarly, with the amalgamation of the various UK equality commissions over the next two years and their realignment around a mainly human rights agenda – under the umbrella of the Commission on Equality & Human Rights (CEHR) – it can be expected that the prominence of E&D in the private and public sectors will not only continue but,

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[1] www.focus-consultancy.co.uk/site/index.htm

just as importantly, deepen in terms of its institutional penetration.

Need for a professional association

1.10. Since the 1960s many bodies have pioneered the idea of forming a "professional" association of and for E&D Practitioners. As early as 1970, after the establishment of the Community Relations Commission (CRC) under the 1968 Race Relations Act, an embryonic "Association of Community Relations Officers" (ACRO) was formed. This body opened its membership to any individual working for a local Community Relations Council and acted as a network for senior staff, a campaigning body and an unincorporated "trade union advocacy organisation" speaking directly to the CRC.

1.11. More recently arguments for an association have been made in both public and private sectors. Within the public sector the Commission for Racial Equality (CRE), the Equal Opportunities Commission (EOC), the Disability Rights Commission (DRC) and the Department of Trade and Industry (DTI) have each initiated discussions around the idea. Within the private sector the financial services industry (consisting mostly of the major banks) and the consultancy sector itself have undertaken similar projects. Efforts have included the publication of directories of Practitioners (for example "The Diversity Directory") and the organisation of seminars to explore the possibility of setting up an association. In these seminars both field-specific and overarching models of associations have been explored.

1.12. The rationales that lay behind moves towards establishing an association were diverse. In one sense they were an expression of professional self-interest: a desire to create a body that E&D Practitioners could consult and use for their own development. In other senses they were responses to problems associated with:

- The rapid and ad-hoc growth of the field that is resulting in a proliferation of individuals, partnerships and small to medium-sized companies offering E&D-related services;

- The lack of national regulation ensuring that these individuals and organisations and the services and products they offer are based on proven standardised approaches, methods and objectives;

- The spread of "unprofessional" and even unethical practice;

- Increasing challenges faced by organisations in meeting their legislative duties;

and

- Challenges related to the delivery of services to market sectors that are fractured and layered in complex formations;

1.13. As such, the lack of a professional practice model and the lack of a professional identity were key issues that also had to be addressed in this study. With less than four months – November 2006 to February 2007 – for the completion of the study and the production of this report, the methodology and approach taken needed to be sufficiently flexible and rigorous to meet the requirements of the study and answer all the research questions.

2. Approach & Methodology

Approach

2.1. The LSC had set the following broad guidelines for the conduct of this study:

- The study should be UK-wide and include consultation with the target population from across the country;
- The target population for the study includes people with responsibility for E&D in their job description/job responsibilities. This might form part of or their entire role;
- The study should include both in-house Practitioners and external Consultants;
- The study should target people working in the public, private, voluntary, charity and community sectors.

2.2. In consultation with the LSC and its Advisory Group, a questionnaire (Appendix C) was designed to capture E&D Practitioners' attitudes towards the feasibility of a professional association and to seek responses to the objectives in 1.5 above.

2.3. To maximise responses from the questionnaires, it was despatched to the study population by post, e-mail and via the LSC Website. The design of the questionnaire enabled respondents to complete the process quickly. Provision was made to respond to a poor response by conducting a number of telephone interviews but this was not actioned due to constraints of time and the determination that the response rate was adequate for the purpose of the study.

2.4. The study population identified for sampling with the questionnaire included

- People responsible for E&D in their job descriptions,

- In-house Practitioners, and

- External Consultants working in the public, private, voluntary, charity and community sectors.

This UK-wide study population presented a major collection and collation problem. As no comprehensive, centrally located list of practitioners exists, the study population was developed through the following methods:

- Draw upon Focus's own database. From over twenty years' experience in and knowledge of the field Focus possess some 300 associates and organisational details from the public, private and third sectors plus an active associate network of 100-plus E&D consultants;

- Access the contact lists provided by members of the LSC Advisory Group that included the Equality Commissions and major Government Departments and Agencies; and

- The use of the LSC's website and the compiling of contacts drawn from various directories and other websites that exist.

Methodology

2.5. The questionnaire was designed and piloted by Focus and checked for consistency, redundancy and applicability. Together with a standardised equal opportunities monitoring form, the questionnaire was issued to a non-random convenience sample[2] of 1,500 E&D Practitioners drawn from the database described above. Questionnaires were distributed via post, email and the website. Of these, 210 fully completed questionnaires and 171 demographic monitoring forms were returned by 5pm on 9 February 2007. The questionnaires thus received a response rate of 14.0% and the monitoring form a response rate of 11.4%. In the context of a cold-contact convenience sample, response rates may be considered good. Further information and full results can be found in Appendix A.

2.6. As indicated in the Objectives, certain items were analysed in relation to the employment context of participants completing the questionnaire. The most suitable context by which this analysis could be carried out was *employment within single or multiple sectors* (see 3.11 below). Following a review of returned questionnaires, however, it was also decided that many other items could be analysed also in relation to *years of experience within the E&D field*. This variable had the benefit of addressing

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[2] A convenience sample is the most efficient way of collecting participants in a study where the parameters of the target population are unknown. In the UK no database of E&D practitioners exists that is detailed enough to construct a random and unbiased sample

key issues that could, if found to be significant, affect support for and take-up of membership within an E&D professional association. As such, four bands of length of experience were chosen: 1 to 7 years, 8 to 14 years, 15 to 21 years and more than 21 years. Those with between 1 to 7 years were considered new to the field while those with more than 21 years were considered to be "experts". While responses to items are likely to be affected by years of experience as a result of that experience (the career stage of the participant), a more interesting question can also be raised, which can be stated thus:

> The more experienced practitioners are probably more likely to have been involved in early struggles of a political nature to create the E&D field while recent entrants are more likely to have entered the field via human resource management. Does the "political" background of experts, when compared with the "professional" background of recent entrants, affect opinions on questions addressed by this research?

2.7. The final, additional, aim of this report will be to address this issue and to see whether years of experience does not, in fact, alter opinions in any significant way. This is an important question to address, as if an association is to have broad appeal it must meet the needs of E&D Practitioners regardless of their background or career stage.

2.8. In addition to the quantitative approach, qualitative data was gathered from a small cohort of key experts within the E&D field. Semi-structured interviews were held with 25 individuals (Appendix D) who were drawn from the main E&D areas as represented by the existing formal bodies, notable practitioners in the private, public and voluntary sectors, the major campaigning organisations, individuals nationally recognised for their contribution to E&D and relevant professional organisations that exist, including the Chartered Institute of Personnel and Development (CIPD).

2.9. As part of the quality assurance process operated by Focus for this project, a small Advisory Group was established to review each stage of the study, tease out any attitudinal findings and assess all submissions to the LSC. This group comprised Focus senior consultants and a number of nationally recognised individuals. This final report and the rigour of its findings were thus critically assessed and this process not only assured quality but enabled added value from the quality of the interventions and suggestions coming from this Advisory Group.

2.10. In support of the qualitative and quantitative approaches, a limited documentary research and analysis was used to provide some context and overarching data on the key aims of the study. Documentary information and materials were gathered and analysed from a range of professional organisations, ranging from the obvious, such as the CIPD or the Institute of Management Consultancy (IMC) to the less obvious. Information about and examples of competency frameworks and accreditation issues (Appendix E) from specialist bodies and professional organisations were also gathered and analysed.

3. Findings

The E&D field today: Demographics, Competencies & Needs

Demographics

- *What are the personal and professional characteristics of the potential membership of an association?*
- *What are the different types of E&D roles/jobs currently being undertaken across different sectors?*

3.1. Professional associations exist to further the interests of a particular profession through the establishment of standards and the protection of its members. According to the OED, a profession is defined as "a paid occupation, especially one involving training and a formal qualification". If an Equality & Diversity Practitioners' Professional Association is to be established it must, in some crucial way, reflect the constitution of the field of professionals that it professes to represent, both in terms of their professional activities but also their professional identity. The past decade has seen significant changes in the size and shape of the E&D field. Born from community and political struggles in the field of race relations, E&D has increasingly become a profession linked with human resource management. In parallel with this, the association of E&D with "faith", "gender", "disability", "age" and "human rights" has led to further transformations in its practice and identity. The perception amongst leading experts[3] within the E&D field seems to be that those who have been "around since the start" are typically of Black or ethnic minority origin, while those who came into the field recently are typically of white British origin.[4] This perception led to one female respondent to comment:

> There could be a threat that it would be only the archetypes (white, female, degree educated, middle class) who would benefit out of [a professional body] and that it would indirectly discriminate against a number of

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[3] Informal interviews with several E&D Practitioners with more than 21 years experience
[4] Ibid.

people…working in this field already, particularly Black (African, Caribbean and Asian) communities.

3.2. When put to members of the interview group of leading experts, this view found considerable support from nearly all the Black, Asian and other minority ethnic participants. In fact, some 52% of the total interview group or 86% of the BME sub-group concurred.

Personal characteristics

3.3. Of all those who returned completed monitoring forms, 26.3% were male and 73.7% were female. Of males, 55.6% were of White British origin, 11.1% were of Asian/British Indian origin, and 6.7% were of Black Caribbean, Mixed Black/White and Mixed Other origin respectively. Other groups represented included Pakistani, Black Other, White Irish and White Other. Of females, 79.4% were of White British origin and 7.1% were of Black Caribbean origin. Other groups included Asian/British Indian, Black African and White Irish. For whatever reasons, it does appear that persons of white British origin constitute the largest group of E&D Practitioners, at least so far as participation in the survey is concerned.

3.4. The largest group of participants was aged between the years 45 to 54 (39.8%; males 40.05% and females 39.7%). Of all practitioners, the majority (54.3%) have worked in some or all aspects of E&D for between 1 to 7 years. Those working within the field for 8 to 14 years made up 24.3%, for 15 to 21 years 9.0%, and for more than 21 years 12.4%. As such, the majority of E&D Practitioners can be considered recent entrants for the purposes of this report.

3.5. By religion, 37.8% of males were atheist, 33.3% were Christian, 8.9% were Hindu or Other, and the remainder Muslim, Buddhist and Jewish or preferring not to say. Of females, 44.4% were Christian and 39.7% atheist, with the remainder Hindu, Jewish, Sikh, Buddhist or preferring not to say.

3.6. By sexual orientation, 86.7% of males were heterosexual, 4.4% homosexual, 2.2% bisexual, with the remainder preferring not to say. Of females, 84.9% were heterosexual, 4.0% lesbian, with the remainder preferring not to say.

3.7. By disability, 20.0% of males and 12.7% of females indicated they had some recognised disability.

3.8. When examined alongside the interview group, where all members had more than 21 years' experience of working within the field and where 56% were men, it is perhaps understandable that many interviewees expressed views on the dominance of women practitioners and levels of competence.

'There are far more women entering the field now and the general level of understanding – especially of our history and struggles – is low, if it exists at all.'

Summary

- Reflecting "concerns", or, perhaps, simply an awareness amongst BME practitioners that the E&D field has changed, white British women *by numbers* dominate the profession. Furthermore, the majority of participants completing the questionnaire were recent entrants to the profession. Although some of these newcomers were members of BME communities themselves, and while they too might not have much interest in or knowledge about the political roots of E&D, it was a widely held view that the needs of minority groups within the field have the potential to be overlooked or sidelined.

- As such, E&D Practitioners may be defined as belonging within two broad groups. The first is those with a political interest in the field, probably as a result of their own or community's own struggles. The second is those with a professional interest in the field, who, despite any commitment to the political ideology of E&D, are more likely to approach the issue as a pragmatic question of bureaucracy.

- Although these two groups may not be at odds with each other (the extent to which they differ will be examined closely throughout the rest of this chapter), a distinction of some sort does exist between them and participants in the survey were aware of it.

Professional characteristics

3.9. If the two groups are not to diverge on matters of opinion regarding the future of their field or the nature of the proposed association, we might expect to find the reason to lie within the nature of their participation within the field itself. If a professional identity exists amongst E&D Practitioners that transcends partisanship, it would be because they work in the same capacities and towards the same aims. The questionnaires examined the professional characteristics of E&D Practitioners in

several ways. The first was through job title, which received a surprisingly low response rate, and others included aspects of E&D covered, sector of employment (public, private and others), focus of role, duties of role and competencies required for the role.

3.10. Of the 171 completed monitoring forms, 146 (85.4%) listed job title. The most frequent (39.0%) was "Head of E&D", "Principal E&D Officer", or some variation on that theme. Of the rest, 15.8% described themselves as "E&D Officer", 13.0% as "E&D Advisor", 4.8% as "E&D Co-ordinator", 3.4% as "Diversity Consultant" and "HR Manager" respectively. Following these a range of other job titles were listed, including HR Diversity Consultant, E&D Company Director, Senior Lecturer and others with little or no obvious association with E&D (this does not mean, of course, that E&D was not part of their employment duties).

3.11. Recent government legislation required that all public sector organisations establish E&D officers within their personnel. For this reason, we would expect to find the majority of respondents to the questionnaire to be working within the public sector in such a capacity. Of all participants, 83.3% worked in one sector and 16.7% worked in multiple sectors. Of those working in a single sector, 81.7% worked in the public sector, 9.7% in the private sector, 3.3% in the voluntary sector and 2.4% in the charity sector. A further 2.9% worked as independent consultants. Of all those working in a single sector, 73.1% worked in a functional role that was fully focused on E&D and 26.9% worked in a role in which E&D was just one of several functions – partly focused. It would seem, then, that the majority of participants in this study worked in the public sector in a "fully-focused" role.

3.12. Of those working across multiple sectors, 82.9% sometimes worked in the public sector, 68.6% sometimes worked in private sector, 54.3% sometimes worked in the charity sector, and 45.7% sometimes worked in the voluntary sector. Of these, 51.4% worked as independent consultants. Of all those working across multiple sectors, 80.0% worked in a fully-focused role and 20.0% worked in a partly-focused role. We can assume these Practitioners are hired to provide E&D-related services within public, private and other sector organisations. The question of whether working with these different focuses affects attitudes towards competencies is examined in paragraph 3.24 below.

3.13. Of those working in a single sector 85.7% worked in-house with a focus on staff, 9.5% worked with an external focus on customers and 4.8% worked both in-house and

externally. Of those working in multiple sectors, 56.4% worked in-house, 35.9% worked externally and 7.7% worked in both. It appears that those working within a single sector are generally employed to focus on staff within an organisation, while those working across sectors are more likely to deal with customers. This would lead us to assume, as in paragraph 3.11 above, that the majority of E&D Practitioners working within a single sector are specialists of their field within larger departments. Those working across sectors are brought into organisations for advice and training purposes.

3.14. Of those working in a single sector, most participants indicated they took on various roles. Of the 175 participants concerned, 64.0% listed advisor, 41.7% listed trainer, 40.6% listed consultant, 29.7% listed project/accounts manager and 29.1% listed researcher. Of these, a further 28.0% indicated they also had other responsibilities. Overall, E&D Practitioners employed in one sector work for the most part as advisors, trainers and/or consultants.

3.15. Of those working across multiple sectors, employment duties were also found to be various. Of the 35 participants concerned, 68.6% listed trainer, consultant and advisor, 37.1% listed project/accounts manager and 28.6% listed researcher. Of these, a further 47.7% indicated they also had other responsibilities. Overall, E&D Practitioners working across multiple sectors were also involved in advisory, training and consultancy work.

3.16. Finally, the vast majority (89.5%) of participants covered all aspects of the E&D field, including race, faith, disability, gender, age and human rights. Of the rest, many worked in multiple aspects of the field with just two indicating that they worked in single aspects alone (human rights and disability respectively).

Summary

- The majority of E&D Practitioners work full-time within the public sector.

- Including those working across multiple sectors, the majority engaged in roles that included advice, training and consultancy work.

- The majority of E&D Practitioners work on issues relating to the main strands of the field, including race, faith, gender, disability, age and human rights.

- As such, general professional identities are likely to be forged within the employment context.

Training & Competencies

- *What training do people working in E&D currently have?*

- *What competencies and skills should people working in E&D have?*

- *How does this differ by employment context within single or multiple sectors?*

Academic training

3.17. Those with political backgrounds might be expected to have different types of academic and professional training than those with professional backgrounds. Overall, however, all participants displayed high levels of educational training. Of all participants, 32.4% had obtained Batchelor's degrees, 12.4% had obtained Postgraduate Diplomas and 38.6% had obtained a Master's degree. As such, 85.7% of participants held at least one first degree. The largest group of participants had been trained at some time in management or business (45.2%), while other areas included social science (38.6%), humanities (20.5%) and the arts (16.6%).

Vocational and professional training

3.18. Of all participants, 43.8% held a vocational qualification and 42.9% held a professional qualification. Of vocational qualifications, none appeared to relate to E&D and the majority were Certificates in Education. Of professional qualifications, the most frequent was obtained from the CIPD. A total of 40.5% belonged to a professional association of some type, with the most frequent being the CIPD (31.0%). After that, participants also belonged to a range of bodies, including, in no particular order: The British Psychological Society, The Law Society, The Chartered Management Institute, The Chartered Institute of Marketing, The Royal College of Nursing, The Institute of Directors and The National Union of Teachers. The most relevant of these associations will be examined in greater detail below.

Competences and skills

3.19. The title "E&D Practitioner" includes any individual whose employment includes the monitoring and/or promotion of E&D in a work place or customer base, either as a contact point and/or a trainer, advisor, consultant, researcher or other. The individual may be responsible for ensuring staff and customers are aware of E&D-related legislation and the times at which (if any) their activities transcend it. They may also be responsible for disciplinary action or activating a disciplinary process. On the other

hand, an E&D Practitioner may simply train other individuals for such a role, while some trainers may also "train the trainers".

3.20. Such roles would presumably demand different competencies. In-house Practitioners within the public sector may require very different competencies to external Consultants working across a range of sectors. Similarly, career stages are likely to demand different skills as different kinds of responsibilities are adopted. Any professional association must ensure to recognise and promote the relevant competency framework of its membership base with sensitivity in regard to these issues.

3.21. The questionnaire contained one question exploring competencies and skills. Using a sliding scale ranging between (5) "critically important" to (1) "very unimportant", participants were asked to rank the following criteria:

- *Social and interactive skills*
- *Managerial competencies*
- *Critical and evaluative competencies*
- *Subject/content knowledge*
- *Writing/report writing skills*
- *Discipline (time-keeping and efficiency)*
- *Context knowledge (politics and policies)*
- *Objectivity*
- *Analytical skills*
- *Commercial knowledge*

3.22. Participants were also encouraged to add their own ideas. These included "passion for the subject", "empathy, diplomacy and assertiveness" and "political engagement".

3.23. In line with issues discussed above, perceived competencies were examined in relation to two variables, years of experience and sector of employment. Due to the high number of zero or low scores for "very unimportant", "fairly unimportant" and "neutral", these scores were combined to make the data suitable for testing.

3.24. In relation to employment (working across single or multiple sectors), no statistical significance was found. Support for each item ranged between "fairly important" and

"critically important", except for *commercial knowledge* that scored moderately. In relation to career stage, just one item was found to be significant: *critical and evaluative competencies*. Those with over 21 years experience strongly supported this skill, with 72.0% suggesting that it was "critically important". Majorities of those with 1 to 7 and 15 to 21 years experience suggested it was "fairly important" and those with 8 to 14 years experience were divided between "fairly" and "critically" important.

3.25. Overall, participants favoured all competencies at fair to critical levels. This was regardless of their years of experience or whether they worked in a single sector as an in-house practitioner or across multiple sectors as an external consultant. In both groups *social and interactive skills* scored the highest while *commercial knowledge* scored the lowest. As such, agreement seems to hold across the E&D field as to what competencies are the most important for successful practice.

3.26. This view was echoed by nearly all those interviewed (80%). A high level of general competence combined with *critical and evaluative skills* was seen to be nearly as essential as what all saw (100%) as being vital: *social and interactive skills*. If anything, the subject of "competencies and skills" elicited more responses of a vociferous kind than any other question asked. As can be seen in Appendix A, a majority of interviewees saw all the core competences and skills listed in the survey questionnaire as being either "critically" or "fairly" important. Other competences sought included "leadership", "communication", "diplomacy", "negotiation", "coaching" and what one interviewee termed "cross-market, segment and strand knowledges". All considered that non-contextualised knowledge was pointless and hence agreed with the interviewee who stated:

> "You can't understand any equality issue without a knowledge of the history of struggles here and abroad … whether it's the black, women, gay, disability or even human rights movement, nothing makes sense outside of the history of those struggles and the politics and policies they gave rise to … If these (contexts) are not taken into account, then the whole field becomes one about 'compliance' instead of 'change', and 'box-ticking inputs' rather than structural 'outputs'."

Summary

- The educational training of E&D Practitioners is high. Many also hold vocational and professional qualifications. A large minority (31.0%) belong to the CIPD. Given the role and involvement of the CIPD in E&D issues, this could present a significant challenge to any E&D Association in terms of its remit and validity.

- E&D Practitioners regard a range of competencies and skills to be useful or essential for successful practice. Of these, social and interactive skills are considered the most important, while commercial knowledge was considered the least important.

- Employment in any specific sector and career stage did not significantly alter support for any competency except one (critical and evaluative competencies). As such, we can assume that despite their different backgrounds E&D Practitioners share much common ground, at least so far as the requirements of the profession are concerned.

- A more detailed discussion of competency frameworks can be found in Chapter 4.

Opportunities & needs for professional development

- *Where do people working in E&D currently access formal and informal diversity related training and development and how do they make their decisions of which providers/sources to use?*
- *What gaps currently exist in their skills and what difficulties or challenges is this currently posing?*
- *How should the career path for E&D professionals be defined?*

Opportunities for professional development

3.27. All recognised professionals not only share standardised training and qualifications but also access to forms of professional development. According to participants in this survey, such access is not standardised and what is on offer is not suitable. Participants indicated that they maintained their professional development through various formal and informal channels. Via formal channels, 52.4% had taken a private or independent course and another 41.9% had taken an in-house course. Only 18.3% related training back to pre-employment education. Via informal channels, 92.4%

obtained knowledge and training through attendance at meetings, conferences or seminars. A further 75.7% obtained knowledge and training through their social networks while 66.2% used trade and other relevant literature. Many listed the Internet as the main source of such literature. Of all participants, 45.2% refreshed their knowledge on a continuous basis and 50.5% refreshed their knowledge on a yearly basis.

3.28. Various selection criteria were used by participants to decide which sources of development to use. Of items contained in the questionnaire, the largest group of participants (76.7%) based their decision on personal recommendation or established reputation of a particular source. Others included cost (57.7%), location (38.6%), accreditation (19.0%) and employer's request (15.2%). The relatively low interest in "accreditation" possibly has more to do with lack of knowledge about such courses (as was evident in personal statements offered by participants) rather than lack of interest in accreditation *per se*. As one female participant argued:

> In the past I have attended events held by [various governmental and non-governmental organisations] which have always been helpful but the only relevant qualification from these was a Diploma in Employment Law of which one module was Diversity and Equality. I feel it would be helpful to have a specific recognised Diploma or similar. As there is so much legislation and requirements in the diversity arena…it is important that any qualification does not just cover the basics but actually [looks] at wider issues such as how organisations promote diversity etc. and the business benefits for doing so.

3.29. A second female respondent also suggested:

> I feel I have enough [qualifications and training] (given that I am continuously learning on an informal basis through legal journals, legal updates, training courses, exchange of views with other practitioners, etc.) although if there were a recognised qualification through a chartered body I would probably be keen to do it provided it added real value. I don't know of any real formal qualifications that exist at the moment other than the [a leading HR professional body] legal qualification, but I feel this is very expensive for what is provided. And I can do a good job without it.

3.30. Although many other participants made similar points, very few could find what they wanted. Some indicated that the current range of choices was too narrow, too much aimed at newcomers to the field or simply too basic. As one female respondent put it:

> I no longer engage with formal training since there is little or no formal training of a sufficient quality or high interest value that would encourage me to engage with it…My experience is that training aimed at practitioners is generally very poor value for money, sometimes delivered by trainers who use out-of-date materials and methods. In these circumstances, I have found myself unable to maintain the role of 'learner'. Instead, I have felt compelled to make contributions to redress the incompetence of the 'trainer'.

Limits of training

3.31. As such, although 73.8% felt they had received adequate training to carry out their role as an E&D Practitioner, 23.3% felt they did not and a further 2.9% were undecided. It seems that a large minority of E&D Practitioners operate with the feeling that they lack adequate training to do so. As one female respondent put it:

> I feel that I have insufficient training/personal preparation on how to conduct successful and in-depth E&D training – how to get participants to bring up and deal with issues such as identity and hate and how to deal with this in the class room setting. [I] could do with more [training] on change management and different methods of achieving cultural change in an organisation

3.32. A number of reasons were given for the lack of adequate training. Many participants indicated that they might benefit from a professional qualification. Others thought that help with knowledge-acquisition and information-sharing would enable them to keep up to date with legislative changes and other developments in the field. Some participants singled out particular E&D training courses within professional HR bodies as the source of their poor development. One respondent suggested:

> I think experience counts for a lot. Having studied for [a leading HR professional qualification] in a previous role when I was an E&D specialist focused on staff, I can honestly say that it was not at all useful for my role.

3.33. Several interviewees, again as to be expected, echoed this sentiment, suggesting that experience counts for all and that any E&D association should place more emphasis on this than formal qualifications and/or courses attended as a criterion for membership.

Definition of career path

3.34. Insofar as participants in this survey are concerned, E&D professional career paths begin after graduation in an unrelated or marginally related subject. From this point, professionals enter E&D via HR and the CIPD or else become involved in E&D issues through the course of their everyday employment. Most work in the public sector and focus on staff within one organisation; a large minority work across sectors as either independent Consultants or Consultants working under the umbrella of a larger organisation.

3.35. In the absence of relevant training courses and qualifications, the vast majority seek to develop their knowledge and skills through the use of various formal and informal channels. Some of these may be required or encouraged by their employers while some are rooted out by practitioners themselves.

3.36. Given this, it would seem erroneous to assume that any real "career path" exists at all. In the most part, Practitioners "fall into" E&D practice after university graduation when it then becomes their main role, rather than seeking it out as a specific career after college.

Summary

- Opportunities for professional development in E&D appear to be ad-hoc and wanting. A large minority of Practitioners feel they do not have adequate training to fulfil their role with serious implications for those who depend on them.

- As a consequence and together with their diverse but advanced educational and professional backgrounds, no career path can be identified at this stage.

- An association could play a vital role in establishing standardised forms of access to professional development and defining an E&D Practitioner "career path".

Scope, function and role of an Association

Scope

- *What levels of support exist for a practitioners' association?*

- *Who expects to benefit?*

- *What are the advantages and disadvantages of different models of existing professional organisations?*

- *What are the advantages and disadvantages of different existing models of accreditation that exist amongst established professional organisations?*

- *Should existing training courses seek accreditation status? Should new accredited training be offered?*

3.37. In the previous sections we have seen that E&D Practitioners have diverse backgrounds and divergent careers but the majority agree on what competencies are required for their different roles. In the following sections support for a professional association will be examined, as well as the advantages and disadvantages of different models and the types of accreditation on which it could be based. As before, years of experience will be taken into consideration as a potentially significant influence on attitudes towards these issues.

Support for an association

3.38. Of all participants, 78.6% thought an association would be a good idea. Of the rest, 15.7% remained undecided and 5.7% were against the idea. When considered by years of experience, support for an association was not found to be significant. This finding suggests that the strong support found for a practitioners association was not positively or negatively influenced by years of experience. If we do assume that years of experience is in some way correlated with background in the field as either a political advocate or HR professional, then we might also be able to say that a practitioners association will be supported by individuals across the E&D field regardless of their personal history within the field. That is, those with political agendas might find the association as useful for their ends as professional HR practitioners. Further research into this issue, as suggested at various times throughout this report, would be useful.

3.39. Although 78.6% of participants thought an association was a good idea, only 70.5% thought they would benefit from it. A further 20.5% were undecided and 9.0% thought they definitely would not benefit from an association.

3.40. The difference between those who thought an association was a good idea but nevertheless thought they would not benefit is probably due to existing membership with other associations. That is, they liked the idea of an association because they recognised the value in general terms but concluded that they were receiving all they needed from other sources. As one female respondent suggested:

> In Wales the NHS Centre for Equality and Human Rights co-ordinates a regional network called the "Equality Link Workers Forum". It is funded via the Welsh Assembly Government, has a website and organises meetings, networking events and speakers. I wouldn't want to join anything that compromised this, but I would certainly consider joining something that was added value…

3.41. Expectations to benefit from an association, when considered by years of experience, were found to be statistically significant. Practitioners with between 0 and 7 years experience expected to benefit the most. Those with between 15 and 21 years experience expected to benefit the least. This pattern is perhaps to be expected: relative newcomers to the field are more likely to seek professional and career development from a range of sources and in a range of formats. Those already established, however, are least likely to benefit as they might not regard an association as able to provide them with what they most need. This pattern has already been observed in statements presented above. More statements in relation to this issue will be presented below, under the discussion concerning organisational structure of an association; but here it needs to be emphasised that overall, the majority of participants expected to benefit from an association.

3.42. These findings were also found among those interviewed (84%). Whilst they could see some direct personal and professional benefits, it has to be noted that their concern – as experts with more than 21 years' experience in the field – was with the field in general.

Advantages and disadvantages of a professional association

3.43. Participants in this survey had much to say on the issue of advantages and

disadvantages of an association. In the first place, it was felt that any association must meet the interests and needs of Practitioners with highly varying levels of experience, at different points in their careers or who worked in different sectors. (We have already seen, however, that the competencies for practice and support for an association were not affected by these factors.) For some, the existence of this diversity was the reason for why they supported an association. As one female participant commented:

> As the growth in equality legislation and the complexity of working across different strands increases I would welcome the establishment of a body for diversity practitioners which spans the public and private sectors

3.44. On the other hand, one female participant was worried an association might actually side-line E&D by destroying that diversity:

> I am very wary of the diversity practitioner's title as it rather suggests that this is an area for experts while I believe that all practitioners in every walk of life should have understanding of our diverse needs in order to provide good services. Once siphoned off for professional practitioners it rather creates an elite body of knowledge that will override the sound knowledge and even common sense that should be integral to all our experiences.

3.45. Amongst interviewees, however, this disadvantage was outweighed by the potential benefits an association could bring. The reasons given included a consensus around:

- Setting the standards and quality for the profession;

- Ensuring professional transparency and integrity;

- Providing a professional voice;

- Promoting the sharing of experience and best practice;

- Helping to regulate the field;

- Building credibility;

- Organising representations to governmental bodies, etc;

- Providing a recognised professional pool of talent;

- Helping to avoid sectorial splits and conflicts within the equality field;

- Working towards forging credible/legitimate links with relevant organisations;

- Guaranteeing and ensuring specific and additional competences and skills;

- Setting standards for professional behaviour;

- Ensuring objectivity/non-partisan approaches in the field;

- Helping to prevent regulation by the back door; and

- Assisting with the empowerment of equality and diversity practitioners.

3.46. In addition to these reasons, which amount to a coherent rationale for an E&D association, three other reasons were stated directly or strongly hinted at by a significant minority of interviewees. The first, and shared by some 20% of the interview group, saw an association as helping "to provide a counterbalance to and critical (though constructive) orientation towards the new Commission [CEHR]". The second, held by 12% of the group, addressed the longstanding issue of making opportunities within the labour market fairer for BME communities. Interviewees pointed out that an association could help with the building up of economic and material security as an effect of equal opportunities in access to employment and equal pay. The last point, made in one form or another, pointed to what could be seen as the whole Human Resources relationship dilemma. Over 33% of interviewees wanted to see an association that would map out and defend a field that was not HR-governed, determined and promoted.

3.47. Potential risks, on the other hand, included:

- Limited appeal to selected cohorts depending on function and scope;

- Critique of political partisanship

- Institutionalisation of the Association as an arm of state or part of the CEHR family;

- Credibility undermined if development of association is not inclusive or the final product "owned" by its members;

- Ghettoisation of practitioners (as opposed to complete absorption into Human Resources)

- Non-mainstreaming within overall management function;

- Dominance of one strand over another; and

- Stifling of genuine community voices.

Models of professional organisation

3.48. Professional organisations typically operate in two ways. In the first they serve the public interest through the maintenance of high standards by enforcing training and adherence to ethical codes amongst its members. The second is to serve the interests of professionals themselves through advocacy and lobbying for their needs. If an organisation seeks to fulfil the first role, potential members must be rigorously vetted to ensure they are capable of successfully carrying out their professional duties. If an organisation seeks to fulfil the second role, however, membership may be more open.

3.49. In practice, many professional organisations fulfil both roles and as such offer different grades of membership. Broadly, three grades of membership exist. The most basic is an Open Network Association and is usually available to all those who have some interest in the field of the organisation regardless of their role within it. This type of association offers no accreditation and demands no special knowledge or skills to be part of it. Open associations usually serve no greater role than to act as a forum for networking and information sharing.

3.50. The second type of association is a Members Association. Its role is similar to that of an Open association except membership is based on education and years of experience. Some form of accreditation may therefore exist, but probably not on the basis of the organisations own examinations or inspections system.

3.51. The third type, a Chartered Membership Association, is also the most advanced. Accreditation is a central function of this type of association and this is usually awarded on the basis of successful completion of the association's own examinations system. Accredited chartered professionals are typically regarded as the experts of their field.

3.52. Participants in the survey who supported the establishment of an association were

asked to indicate whether they preferred one of three options - an open, member or chartered membership structure. Of these, 45.6% thought an association should be open to all Practitioners without any kind of membership criteria. The remaining 54.4% varied in their support for a members association (12.6% of all participants) and a chartered members association (18.7%). A further 22.2% volunteered that a mix of open, member or chartered statuses could work the best. Had this item been included on the questionnaire, it is very likely that it would have scored well.

3.53. It would seem, then, that nearly half would prefer to see an association that acted as a networking forum and central point for information dissemination, probably with lobbying powers, while just over half would also like to see some kind of quality assurance system put in place.

3.54. Considered by years of experience, levels of support for the three different options were statistically significant. An Open Association was preferred by the majority of Practitioners with 0 and 7 years experience (51.8%). A Member Association was preferred by a majority of Practitioners with 8 and 14 years experience (20.8%) and a Chartered Member Association was preferred by a majority of Practitioners with 15 and 21 years experience (37.5%). A mix of open, member or chartered membership was preferred by Practitioners with more than 21 years experience (29.2%).

3.55. As such, preference for an Open Association was strongest in those Practitioners who might have difficulty achieving member or chartered status (either by lack of qualifications or work experience): that is, those with only 0 and 7 years' experience. After that, preference for member or chartered status increased with years of experience, finally culminating in those with more than 21 years experience most supporting the idea of mixed membership levels.

Advantages and disadvantages of open and closed membership

3.56. In support of an open network many participants raised concerns that vetting could close E&D to people of diverse backgrounds and/or who lacked qualifications. Many suggested that experience and empathy were the most important criteria for good practice, together with a background in community activism. Some claimed vetting was completely against the principles of E&D. One male respondent commented:

> I do not want to see any strict criteria [for joining]. Such a forum should be open

to all with an interest in E&D.

3.57. A female respondent concluded:

> The open network allows more inclusion which for me is what E&D is fundamentally all about. The other two options may lead to exclusion and in some cases hierarchy. For me all people have skills and talents which should be valued and not necessarily measured by qualifications.

3.58. And another female respondent asked how the political backgrounds of some E&D Practitioners would be managed if an association was not open:

> I think care will have to be taken with regard to the industries E&D staff are employed in. Often these positions are occupied by people who have been part of the various social movements that have brought about the existence of E&D issues as well as local activist and community representatives. The fact that the origin of such work is born out of particular struggles is important and if standardisation is the aim this will need to be taken into account.

3.59. Support for some kind of vetting system was also voiced. Generally, these focused on the importance of raising standards, improving the public profile of E&D Practitioners and regulating practice. One male respondent commented:

> It would be useful to be accredited by a professional E&D body. My view is that E&D is typically regarded by cautious employers as a bit of a dark science – they all recognise the benefits but are somewhat fearful of how to approach it. Thus in my opinion the creation of a recognised E&D qualification or professional recognition would go some way towards establishing the vital credibility and recognition that this field of expertise now demands.

3.60. One female respondent commented:

> I am fully supportive of the establishment of a professional body for diversity practitioners. This would establish recognition for people like myself who are undertaking a very complex organisational role which challenges cultural thinking and behaviour whilst making sure that the organisation meets its legal duties. Many of us in the field…often feel marginalised, particularly in the

academic arena.

3.61. Another female respondent argued:

> I strongly believe that there should be an open association in addition to accredited membership. There is need for everyone to access resources and support in the implementation of E&D related policies and strategies. The very nature of E&D is to break down structural barriers. Chartered accreditation/qualifications are important in raising the profile and professionalisation of this specialism but can often be discriminatory in their nature. Therefore I propose that both mechanisms would be developed to gain maximum benefit.

3.62. Overall, arguments in favour of an open association focused on the philosophical and political roots of E&D while those in favour of a closed association focused on the professional direction of E&D. Interestingly, of course, it was those participants with deep backgrounds in E&D that supported closed membership in greatest numbers. It would seem that for them the best way to ensure a professional and proficient sector is to ensure the competency of those who advocate it. The tension could indicate the presence of a second broad discourse within E&D that is focusing on the best way to achieve change. For some, E&D could be about "revolution" while for others it could be about "reform".

3.63. The tension between "open" and "closed" or, perhaps, between "inclusivity" and "exclusivity", was also found among respondents in the interview group. Amongst those respondents with more than 21 years' experience, a hybrid of the open, member and chartered models was preferred. One of the interviewees, who had set up one association and been involved in several others, related support for a hybrid to a particular aspect of the E&D field. The point also reflected the views of many other respondents:

> 'We might all want to see a chartered association eventually – perhaps in 3 to 5 years' time – but we cannot exclude people from the outset. It might be that we have to develop an affiliate, associate, member, fellow type structure, provided we do not discount experience and other modes of objective certification. The last thing we want to do is to build in inequality into a body which is meant to

espouse equality'.

3.64. Before discussing in greater detail the advantages and disadvantages of accreditation, the warning of one female participant should be taken into consideration:

> In the last few years, a national body was established in relation to setting standards for Access Auditors – a critical profession if buildings are to be made accessible. The criteria for membership were so stringent that its credibility as an organisation has been lost and alternative groups established.

Models of accreditation

3.65. If a closed, vetted membership process of any type is to be established, several professional characteristics will have to be selected for the basis upon which eligibility is to be achieved. Accreditation by professional organisations is normally achieved through a combination of educational training, work experience and, sometimes, nomination. Educational training can be achieved through the successful completion of recognised examinations or other forms of assessment awarded by external bodies or through examinations offered by the association itself. Work experience is gained through proven years of experience in roles directly involved in professional practice. Usually, examinations and work experience are graded hierarchically, with higher grades allowing access to higher forms of accreditation. In some circumstances, especially towards the higher ends of membership, nomination may also be required prior to acceptance. In this case, an existing member of the association must support or suggest the promotion of an existing or new member.

3.66. Once awarded, accreditation may last for a lifetime, may require periodic renewal or may be valid for a specific period of time. The model chosen depends on the degree to which certification relates to practice and thus customer satisfaction, the speed with which the profession transforms as the result of advances in knowledge, practice or context and the degree to which professionals may be exposed to litigation. In the E&D field, where rapid transformations in its political and legal aspects take place, a model of frequent renewal would presumably be the most advantageous. The precise time frame to be established, as well as the form of inspection to accomplish renewal, is beyond the scope of this report.

3.67. At the CIPD, accreditation is achieved through a combination of educational

training and work experience. According to the CIPD,[5] five routes to accreditation are possible:

- Educational. The most popular route; a network of educational centres offer a range of full-time, part-time and/or flexible learning courses. Qualifications range from entry-level to advanced senior;

- Professional Assessment of Competence (PAC). Available for senior level operators with 5 years managerial experience;

- Accreditation of Prior Certificated Learning (APCL). Assess post-graduate qualification(s) against the CIPD's Professional Standards;

- National and Scottish Vocational Qualifications (NVQs/SVQs). Alternative to college-based learning and already employed in an HR role; or

- Direct admission for approved qualifications. For those with a CIPD-approved or accredited qualification in the last ten years.

3.68. The questionnaire contained one question probing for what kinds of eligibility criteria should be used to vet potential members. Participants were asked to rank support for these items using a five-point sliding scale ranging between (5) "critically important" to (1) "very unimportant". This question was best answered by those participants who supported the idea of a member or chartered member association. Nevertheless, all participants completed it. As this would likely distort the data only the responses of those supporting some kind of ranked eligibility will be discussed here. Criteria for membership were as follows:

- *Length of time/experience working in the E&D field*
- *Qualifications and training*
- *Being from the target group that you specialise in*
- *Number of projects worked on*
- *An accreditation by a certified body*

3.69. Participants were also encouraged to add their own ideas. These included

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[5] www.cipd.co.uk

"passion for the subject", "desire to change things" and "political engagement".[6]

3.70. Opinion was divided on the importance of each criterion and "don't know" received high levels of support on each item. The two items that probed for attitudes towards experience-related criteria,

- length of time/experience working in the E&D field and

- number of projects worked on

both received good to neutral support. The first was considered "fairly important" by 34.9% of participants and "critically important" by 19.8% of participants, while the second was considered "neutral" by 35.8% and "fairly unimportant" or "fairly important" by 16.0% respectively. However, both criteria also received high "don't know" responses.

3.71. The two items probing for training-related criteria

- qualifications and training and

- an accreditation by a certified body

also received good to neutral levels of support. The first was considered "fairly important" by 44.3% of participants and "neutral" by 19.8% of participants. The second was considered "fairly important" by 24.5% of participants and "neutral" by 26.4% of participants. "Don't know" scored highly on both items.

3.72. Finally, *being from the target group that you specialise in* received lower levels of support. "Very unimportant" scored 22.6%, "neutral" scored 20.8% and "fairly important" scored 19.8%. "Don't know" scored highly.

3.73. When compared against years of experience, responses to three items were found to have statistical significance. These were:

- qualifications and training (with moderate association);

- being from the target group that you specialise in (with moderate to low association); and

- number of projects worked on (with moderate to weak association).

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[6] On this item, the large number of low scores means that all results should be taken with caution: findings here are indicative only and should not be taken as evidence of correlation

Participants with more than 21 years experience came out strongest in favour of all three criteria, a finding which resonated with the view expressed by a majority of interviewees.

3.74. Overall, responses to each item were minimally positively skewed, except for *being from a target group* that was minimally negatively skewed. Educational training and work experience, as in other professional associations, would therefore seem to be suitable models of accreditation for new members to an E&D Practitioners association.

Advantages and disadvantages of accreditation

3.75. Perhaps reflecting the absence of specific learning programmes and training courses in E&D as a professional practice, many participants critiqued the value of education as a model for accreditation. On the other hand, the benefits of being from the target group were frequently expressed. As such, although overall support for the former was greater than support for the latter, those who supported the latter and disfavoured the former were especially vocal. For example, one female respondent commented:

> In my experience qualified individuals are not necessarily the best practitioners in the field. It is often [those who] have a passion to instigate positive change (usually due to personal experiences) who seem to offer the most in terms of innovation and leadership.

E&D Practitioners from or based in HR were less sure about the political background and role of E&D. For example, one male respondent commented:

> I don't think that E&D should be seen as something extra, CIPD covers E&D without the need for [a] specific body

While another commented:

> I think [a practitioner's body] will be a waste of time and money as E&D is no different from any other aspect of HR!

3.76. From the interview group, some 16% expressed the view that *'it was possibly not a good idea to have a totally separate association'*. For reasons that ranged from 'ghettoisation' to 'the monopolisation of the discourse', this significant number of interviewees was clearly concerned about the relationship between their own

organisations and any proposed E&D association.

Educational training

3.77. Educational training was among the most popular forms of accreditation and is commonly relied upon by other professional associations. The question posed in this section is whether existing training courses should be able to achieve accreditation status or should new accredited courses be established? Further information on existing courses can be found in Chapter 4 and Appendix E.

3.78. Although the opinions of participants were not directly gained on this issue, many nevertheless volunteered opinions. As we have seen, the range and quality of existing courses has been called into question.

3.79. Notwithstanding this, it would seem prudent, in the first instance, to work with existing courses in order to encourage them to train students in a range of national standards. Following this, new association-specific courses could also be established.

Summary

- There is strong support for an E&D Practitioners Association of some kind to be established and the majority of participants thought they would benefit from it. A number of advantages and disadvantages were recorded.

- Opinion within the field is, however, divided over whether it should be open or closed. This has serious implications for the degree to which E&D Professional standards could be established and maintained.

- Of those in favour of closed membership, overall support for educational training and work experience as models of accreditation was found. This suggests that an E&D Association incorporating member and chartered statuses would vet potential members in much the same way as similar professional associations.

- However, in the absence of nationally available recognised training courses, educational routes would have first to be established. In the first instance existing courses should be encouraged to adopt a national curriculum and in the second new courses could also be established.

- Advantages of accreditation were seen as being promotion of good practice, while disadvantages of accreditation were seen as contrary to the principles of E&D. Some participants suggested that personal experience (being from the target group that you specialise in) was more important. However, it is not certain how such an approach could be achieved without also contradicting E&D principles.

Costing, Financial Structure and Regulation

- *What services and functions should an association provide?*

- *What membership fees, if any, are regarded as good value for money? What alternatives might there be to membership fees?*

- *What mechanism should be put in place to maintain an overview of new E&D resources and to ensure that these meet the national competencies?*

Services and functions

3.80. The range of services and functions provided by an association will be dictated by its costing and financial structure. The questionnaire contained one item probing for what kind of functions and services any association should provide. These were:

- *members' forum*
- *advisory, legal and research services*
- *members' newsletter*
- *regulatory/accountability body*
- *members' meetings/conferences*
- *a regional set-up*
- *ethical guidance*
- *members' training/development courses*
- *advocacy*

3.81. Participants were also encouraged to add their own ideas. These included an "international perspective" and "mentoring". Items receiving above majority level (+50.0%) support included:

- *members forum*
- *advisory, legal and research services*
- *members newsletter*
- *members' meetings/conferences*
- *a regional set-up*
- *ethical guidance*
- *members' training/development courses*

3.82. Functions and services receiving below majority level support included:

- *regulatory/accountability body*
- *advocacy*

3.83. Overall, it seems that participants would prefer an association that offered training, support and development but not regulation or advocacy. Nevertheless, the large minority views that regulation and advocacy should be within the remit of an association deserve to be taken into consideration.

3.84. Only support for a regulatory/accountability body was significant when years of experience were taken into account. As always, the statistical association was found to be very low. Support for a regulatory/accountability body was weakest among practitioners with 8 to 14 years experience and strongest among practitioners with more than 21 years experience. Overall, support seemed to grow as years of experience increased. This again might reflect career stage achieved: those with less experience could be concerned that they would fail any regulatory/accountability test of practice, while those with many years of experience could feel more confident. It may also be the case that those with more experience recognise the value a regulatory/accountability body could bring to an association. This viewpoint was evident in the following statement by one male respondent:

> I think some of the people doing this form of training are not qualified or experienced enough and are exploiting the market and damaging the reputation of professionals in the field. Such a body would be good for the industry and will regulate and set a higher standard.

3.85. This same comment was voiced by over 55% of all interviewees. In fact, some considerable emphasis was placed on the regulatory function of any proposed

association.

3.86. Of more significance, however, was the tension that existed between those who supported an advocacy lobby, quasi-political function and those who maintained that the association must at all costs avoid "outright advocacy and championing the rights of disadvantaged groups in society". It was felt that such a stance would seriously compromise a "professional" body and leave it open to a critique of political partisanship. But those who strongly supported the advocacy-lobbying role were equally clear that not to do so would move the association away from its historical roots embedded in community struggles around gender, sexual orientation, race, faith, disability, age and the struggle that always seems to be forgotten – class.

3.87. It was feared by some, especially those who had spent decades working in one or more of the equality fields, that the association could become institutionalised as an arm of the state or as a member of the greater CEHR family. For this significant minority of interviewees, an extension of functions was deemed important; one which included:

- Own critical journal;

- Agenda-setting free-standing annual conference;

- Change agency activities;

- Consultations and representational functions.

3.88. Overall, support for services and functions was not dependent on years of service and all but one appealed to practitioners regardless of the career stage reached.

Costing and financial structure

3.89. Participants completing the questionnaire and those in the interview group supported the establishment of an association that provided a range of functions and services. Although the costs of these different functions and services are unknown within the context of this report, we can assume that any association would have to collect substantial revenues if it was to provide them all. Three options for financial structure are generally available to professional associations. The first is to collect revenue through fees paid by individuals, the second is through fees paid by

organisations and the third is through some form of corporate sponsorship. Most associations depend on some combination of these three.

Individual fees

3.90. Of all 198 participants who thought an association of some kind was a good idea, 53.5% were undecided over whether they were prepared to pay a membership fee. Many indicated that their final decision would depend on what was on offer and whether their employer would be willing to pay. A further 37.9% thought that they would be willing to pay while 8.6% were definitely not willing to pay.

3.91. Of those willing to pay, only one suggested at what level: this was £100 per year. Several others indicated that they would only be willing to pay if fees were based on public sector income levels or if discounts were available for public sector workers. If, however, those participants who thought an association was a good idea also wanted the provision of a forum, advisory, legal and research services, newsletter, meetings/conferences, regional set-up, ethical guidance, members' training/development courses, then some indication of what could be considered "value for money" is required. As seen in paragraph 3.18 above, a large minority of respondents already belong to public and private sector professional associations. Of these, the CIPD, Chartered Management Institute and Royal College of Nursing offer the same kinds of membership options and services that participants suggested were important.

3.92. At the CIPD, for example, potential members are offered two membership grades – non-chartered and chartered – depending upon their educational and career stage. There are five types of non-chartered status and three types of chartered status. The most basic form of non-chartered membership is that of Affiliate which carries with it no professional title but does allow access to a range of information services plus discounts on CIPD training courses. Affiliate members pay a one-off fee of £113 and an annual retainer of at least £100. The most basic form of chartered status is that of Chartered Member. Candidates must already be non-chartered members, have three years management experience and passed several qualifying examinations. Fees for chartered membership are undisclosed.

3.93. At the Chartered Management Institute (CMI), potential members are offered two membership grades – non-chartered and chartered – depending upon educational and

career stage. Non-chartered members can join as Students or Affiliates, for £50 or £85 respectively. Chartered members can progress from Associate through Member to Fellow. Each of these costs £102, £126 and £143 respectively. All members of the CMI receive access to information services, career development services, regional branches and networks and other benefits.

3.94. At the Royal College of Nursing (RCN), potential members are offered two membership grades – Heath Care Support Worker or Full Nurse – depending upon educational level and career type and stage. Health Care Support Workers can join at concessionary or full rates, with fees costing £90.26 and £120.35 per year respectively. Membership for Nurses and Midwives includes Student, Full Concessionary, Full Newly Qualified and Full Member. Student membership is open to those enrolled on recognised courses and costs £10 per year. Full Concessionary in open to those joining within one year of registration with the Nursing & Midwifery Council (NMC) for the first time, is available for one year only and costs £135.39. Full Newly Qualified is open to those transferring from RNC Student membership, is available for one year, and costs £90.26. Finally, Full Member is open to those on the NMC and costs £180.53.

3.95. Overall, concessionary annual rates for students and/or affiliates ranged from £10 at the RCN to £113 (one-off) + £110 (annually) at the CIPD. Full annual chartered/professional rates ranged from £143 at the CMI to £180.53 at the RCN.

3.96. The potential annual fee for membership with an E&D professional association, then, probably lies somewhere around £50 for students and £100-£200 for practitioners depending upon educational level and career stage.

Organisational fees

3.97. An organisation might be attracted to join all its employees to a professional association when a majority of them are engaged in work relating to that profession. In this context employers are seeking to utilise information and training opportunities to improve the quality of their own services. As such, organisational membership could be most attractive to private sector consultancies. Public sector organisations, as part of their E&D-related legislative obligations, could join staff in order to access a range of information and services.

3.98. Of the professional organisations discussed above, only the CIPD also offers

organisational membership. Members of the affiliated organisation may hold one of two types of membership. All employees hold basic CIPD membership rights, and have access to vouchers for discounts on CIPD training courses and in-house training courses, plus discounts on conferences and CIPD publications. A small number of individuals also have the right to become, at extra cost, "nominated representatives" of the organisation within the CIPD. These individuals have access to a range of members-only information services and receive introductions to networking opportunities online and through local branch and forum meetings.

3.99. Organisations wishing to join the CIPD pay fees based on the number of employees within the organisation, the number of nominated representatives from that organisation and whether the organisation is based in the UK. UK-based organisations with less than 250 representatives and 1 nominated representative would pay £235 (inc. VAT) per year. Additional representatives would cost £143.35 (inc. VAT).

3.100. The potential annual fee for an E&D professional association, if it provided the same kinds of support and services as the CIPD, probably lies at around £150 for organisational membership and £140 for nominated representatives. However, the kinds of services an E&D Association might be able to provide organisations was not addressed in the research for this report.

Corporate sponsorship

3.101. Professional organisations may attract sponsorship if the sponsor is interested in promoting best practice in a certain field or if it considered it strategically beneficial to do so. One corporate sponsor could meet the associations entire costs or, more likely, several sponsors would have to be attracted.

3.102. Potential sponsors include large bodies within the public or private sectors. Within the public sector the CEHR would probably be the most obvious sponsor, although serious issues of dependence and independence surface as a result. For some participants, a link with the CEHR was expected and considered beneficial. For others, an association was thought of as a potential counter-weight to the dominance of the CEHR. In any case, given the politically-charged nature of E&D, the risks and benefits of operating under the aegis of the CEHR would have to be seriously examined.

3.103. Private sector sponsorship, of course, comes with its own set of risks and

benefits. However obliquely, it is likely that E&D Practitioners and the field more generally could find their activities challenged if or when they came into contact with labour law. In some cases, indeed, the association could find itself in the unique position of being some sort of labour union paid for by the corporate bodies it is seeking to challenge. Again, the implications of private sponsorship would have to be seriously examined. As indicated in the Introduction, organisations within the financial services industry have in the past expressed interest in an E&D association and could provide one route of sponsorship.

Regulation

3.104. Regulatory bodies exist to direct the activities of associations and choose between competing models of practice and competency. In the E&D field such issues are, as has been clear throughout this report, highly contentious. Debates over notions of positive discrimination and positive action, for example, would have the potential to limit interest in membership depending on what decisions the regulatory body espouses.

3.105. Although the questionnaire did not address the issue of regulation directly, several participants did raise it. Of named organisations, only the CEHR was discussed as a candidate. On the other hand, some participants argued that the association could in fact act as a counterweight to the CEHR, which is seen as too powerful within the field as a whole.

Summary

- Although the supporters of an association would like to see it provide a range of functions and services, the majority were unsure if they were prepared to pay for them. Members of comparative associations, however, each pay at least £100 annually for the similar functions and services desired.

- Organisational fees and corporate sponsorships are valid alternatives, although the risks and benefits of the latter would have to be seriously examined.

- The issue of regulation is a serious one and has the potential to limit membership. Further research is required to discuss it properly.

3.106. To return to the whole question of the financial structure and requirement for a professional association, several points should be clarified at the outset. These are:

i. There is little point in drawing up a business plan for a Chartered Institute at this stage, as the dominant view expressed favoured an "open" association that would ultimately lead to a "member" association. Once this position was reached, it would be necessary for a more detailed business plan to be drawn up.

ii. It has to be accepted that the number of practitioners available to join an E & D association at the current time is very low compared to other organisations (eg, CIPD has 350k members), and therefore this limits its potential scope to raise income and provide a full range of services.

iii. It has been established that most of the practitioners preferred an "open" association that would lead to a "member" association, and therefore the outline presented here and the budgets set out in Appendix F deal with the minimum requirements to run an "open" association.

3.107. The most important aspect is, of course, the income streams which would provide the resources to enable the association to operate. The majority of participants in the study were undecided over whether they were prepared to pay a membership fee, although only 8.6% were definitely *not* willing to pay. However, due to the small number of members the association could attract, a realistic charge of £200 per annum would appear high when compared to that charged by other organisations, which have the comfort of a very large membership in comparison. Therefore it is probably more realistic to assume an annual membership fee of £50 - which would mean that other forms of income would be needed to fund the association. You will see from the budgets in Appendix F that we have assumed 1,500 practitioners would become members in Year One, principally from three regions: London and the South East, the Midlands and the North.

3.108. In addition to individual membership there should be a corporate membership for both private sector and public sector bodies. The private sector would cover all types of company, whilst the public sector would cover, local authorities, government departments, colleges, etc. It is proposed that these organisations would pay a membership fee for the corporate body (£150 p.a.) and in addition a membership fee

for each nominated representative from their organisation (£100 p.a.).

3.109. Whilst corporate sponsorship would also be sought (eg, to sponsor the office costs/provide office space), it would be necessary to seek development grants to enable the full costs of the association to be met. These grants could be sought from the EU, LSC/DFES, charitable trusts, etc.

3.110. On the cost side, we have assumed a staff of four initially, to cover a Director, Secretary, Event Organiser and Development Officer. The budgeted salaries have been based on those of similar associations. The overheads, including all office costs, have been based on a small not-for-profit organisation situated outside of London, and we have included development costs to cover the main items the study showed were required. These include members meetings, exhibitions, newsletters, E & D materials and training courses.

3.111. As stated above, we have only provided features that would appear in a business plan for an "open" association with basic costs. We have, however, provided in Appendix F a three year budget, due to the anticipated growth of the organisation. An annual growth rate of 33% has been used due to the increase in E & D work that will result from private and public sector recruitment of more E & D practitioners.

3.112. The budgets show that in Year One £440k would be required to fund the costs and this would rise to £560k by Year Three. If, in the future, a move to a chartered model should be proposed, this would require increased funding which would have to be met from sources other than the individual members.

3.113. It should be noted that the figures quoted above and in Appendix F are estimates. If considerable amounts of grant aid are obtained in the first and subsequent years, then membership fees could be reduced and /or further services provided.

3.114. Given the above points it is envisaged that the main categories of expenditure would be:

Salaries estimated at £161k; office running costs estimated at £70k; development and training costs estimated at £200k and capital expenditure of £9k, resulting in a total cost of £440k for Year One.

3.115. Clearly, as stated in paragraph 3.107 above, the income derived from membership fees alone would not cover this figure. Some £365k would need to be

found from corporate membership (£217k), grants and other funding streams, such as the expected revenues from training, conferencing and other activities. As mentioned earlier, a full financial breakdown of both income and expenditure for an "open" association can be found in Appendix F.

4. Competency Framework

Background

4.1. Within professional organisations core "competencies" for successful practice are identified and promoted to maintain the expert status of members, ensure good service, and inform training and development. As such, increasing numbers of employers are developing "competency frameworks" to structure and integrate a variety of personnel and human resource activities. These activities have been, in the main, associated with recruitment and selection, appraising employee performance, identifying training needs, devising personal and career development plans and determining salary increases and promotion.[7] In this sense, competency frameworks can be understood as the complete collection of competencies required for expert status, good service and professional development.

4.2. The definition of competencies varies significantly between profession and in some cases within professions. However, a common thread among these definitions is that competencies are perceived as descriptions of behaviour that can be used to show staff what is expected of them in their role(s). As such, they are often sub-divided into core competencies, technical or role-specific competencies and, in some cases, so-called organisational competencies. Widely recognised core competencies include those related to decision-making, communication and social skills.[8]

4.3. The final aim of this study was to set out a draft competency framework that could ensure high standards of practice amongst E&D professionals. The study also sought to address the following objectives:

- What should a professional competency framework for E&D Practitioners look like? Does it differ by context of employment?
- What are the advantages and disadvantages of different existing models of

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[7] See CIPD Change Agenda Focus on the Learner www.CIPD.co.uk/changeagendas

[8] See L Miller, N Rankin and F. Neathy (2001) *Competency Frameworks in UK organisations: Key Issues in employers use of competencies.* London: Chartered Institute of Personnel and Development

accreditation that exist amongst established professional organisations?

4.4. Respondents to the questionnaire suggested that *social and interactive* skills were the most important competency for successful practice. No item scored high on the negative evaluations, although commercial knowledge fared worse out of all those listed. Among the interviewees, meanwhile, the subject of "competencies and skills" elicited more responses of a vociferous kind than any other question asked. For them, social and interactive skills were joined by critical and evaluative skills as being amongst the most important. Overall E&D professionals seemed to welcome the establishment of a professional organisation that recognised the importance maintaining standards of excellence.

4.5. Field-specific competencies are currently recognised and promoted by individual E&D Practitioners and organisations. If professional accreditation standards are indeed to be introduced through a professional association, however, these individuals and organisations will need to be convinced to give up autonomy in establishing their own competency frameworks. In return they would gain a shared knowledge base, autonomy in setting professional preparation and entry standards and autonomy for their practitioners. The net result would be the building of a strong profession.

Competencies today

4.6. A small document search and research into E&D competencies were used to contextualise the findings from the questionnaires and interviews. This research has shown that, despite a few exceptions (see Appendix E), there is a paucity of literature and information on graduate training programs that either deal with or have kept apace with the needs of E&D practices.[9]

4.7. Our own research has shown that the majority of E&D Practitioners are highly educated and trained in fields other than E&D, with E&D itself served by an array of ad-hoc courses, conferences, seminars, literatures and so on. As such, they come to the field with no shared benchmarks and methods of evaluation of E&D precepts and practice. Only a handful of fully accredited courses around the UK and Ireland exist that attempt to professionalise E&D by establishing standards for accreditation or offering

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[9] CIPD: Competency Framework in UK organisations: Learning & Devlopment: Annual Survey Report 2007 www.cipd.co.uk /Surveys

bespoke training programmes as part of continuing professional development to improve knowledge, skills and experiences. Five examples have been found to illustrate this and are presented in Appendix E.

The need for standardised continuing professional development

4.8. The importance of standardised continuing professional development is recognised across all professional fields. Pelling, Brear, Lau (2006), for example, showed that although the Diploma of Social Work provides a broad base of practice skills, knowledge and values for social workers, increasingly complex work and frequent legislative and policy changes have contributed to the necessity of developing strategies for continuing professional development. These authors argued that education cannot be alienated from the employment context within which social workers must operate and so there is a need to recognise employers' needs while concurrently maintaining academic rigour.

4.9. As such, and in line with views of participants completing the questionnaires, educational training might be the most useful starting point for developing access to professional, accredited development. To do this, an E&D association may want to consider working with The British Accreditation Bureau (BAB)[10] which has established relationships with a number of the UK's leading professional institutes. The organisation is also able to partner with organisations wishing to develop accredited schemes of their own. Both routes lead to the BAB Certified Practitioner award that allows holders to be listed on BAB's national Consultants Register of accredited professionals.

4.10. Should a more independent route be envisaged, the process by which members of the Association could become certified as either Registered or Accredited Professionals, may compromise the following stages:

Registration

To be registered, practitioners will need to meet some clearly defined minimum requirements. These could include some independent verification of each of the Units in the draft Competency Framework outlined below or having a recognised qualification. Registration provides a first step in demonstrating workplace competence.

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[10] www.british-accreditation.co.uk

Accreditation

To be accredited, practitioners could have their competence in each of the units confirmed by a "recognised" competence-based qualification. Accreditation provides externally validated evidence of workplace competence that takes account of people's existing qualifications.

Recognised Qualifications

However, they might also include a significant competence-based assessment and must be 'recognised' by an independent Professional Certification Advisory Panel as providing complementary evidence of competence in a given unit (or set of units).

Re-certification

Certification could be valid for a set number of years and to be eligible for re-certification, a practitioner must provide up to date evidence of their on-going competence and have engaged in continuing professional development since they were last accredited.

Professional Standards

These can be set by the Sector Skills Council and may include a Code of Practice.

Competencies: A Conceptual Framework

4.11. According to our research one possible definition of a skilled E&D Practitioner is an individual with, amongst others, developed social and interpersonal skills, critical and evaluative skills and objectivity. In other words, a skilled E&D Practitioner is "an individual who is actively becoming aware of his or her own assumptions about human behaviour, change processes, values, biases, preconceived notions, personal limitations, etc." Through this reflective process, practitioners come to understand their own worldviews, how they are the product of their upbringing and experiences, and how this may be reflected in their work with others.

4.12. Secondly, a skilled E&D Practitioner is one who actively attempts to understand the worldview of his or her target group, constituency or client without negative judgments.

4.13. Thirdly, a skilled E&D Practitioner is one who is in the process of actively

developing and practicing appropriate, relevant and sensitive intervention strategies and skills in working with these targeted communities or constituencies.

A Preliminary matrix

4.14. Given this basic summary, it is possible to develop a Characteristics x Dimensions Matrix in which most of the skills within this Competency Framework can either be further organised or developed.

Characteristics	Dimensions
Possessing awareness of own assumptions, values and biases	**Dimension 1** Beliefs and attitudes (e.g. 5 competencies units) **Dimension 2** Knowledge (e.g. 4 Competencies units) **Dimension 3** Skills.
Ability to understand the worldview of the client	**Dimension 1** Beliefs and attitudes **Dimension 2** Knowledge **Dimension 3** Skills.
Experience of developing appropriate intervention strategies and techniques	**Dimension 1** Beliefs and attitudes **Dimension 2** Knowledge **Dimension 3** Skills.

If these three characteristics of an E&D Practitioner are agreed, then based on our findings, our desktop research and the growing field of diversity literature both here

and elsewhere, a framework of competencies for each area can be posed. [11]

POSSESSING AN AWARENESS OF OWN ASSUMPTIONS, VALUES & BIASES

Beliefs and Attitudes

1. A skilled E&D Practitioner has moved from being unaware to being aware and sensitive to their own personal heritage and reference points to valuing and respecting differences and distinctiveness.

2. A skilled E&D Practitioner is aware of how their own personal, cultural and social background and experiences, attitudes and values and biases influence psychological processes.

3. A skilled E&D Practitioner is able to recognise the limits of their competencies and expertise.

4. A skilled E&D Practitioner is comfortable with differences that exist between themselves and clients in terms of each of the six equality strands.

Knowledge

1. A skilled E&D Practitioner has specific knowledge and understanding about his or her own heritage and being and how this personally and professionally affects their definitions.

2. A skilled E&D Practitioner possesses knowledge and understanding about how oppression, discrimination and stereotyping affect them personally and in their work. This allows them to acknowledge their own discriminatory attitudes, beliefs and feelings.

3. A skilled E&D Practitioner possesses knowledge about their social impact upon others. They are knowledgeable about communication style differences.

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[11] See for example, Whiddett, S. and Hollyforde, s. (2003); Shippmann, J. S., Ash, R. A., Battista, M. A., Carr, L., Eyde, L. D., Hesketh, B., Kehoe, J., Pearlman, K., Prien, E. P., & Sanchez, J.I. (2000); Pearlman, K., Prien, E. P., & Sanchez, J.I. (2000).

Skills

1. A skilled E&D Practitioner seeks out educational, consultative and training experiences to enrich their understanding and effectiveness in working with culturally different populations. Being able to recognise the limits of their competencies, they (a) seek consultation, (b) seek further training or education, (c) refer out to more qualified individuals or resources, or (d) engage in a combination of these.

ABLILITY TO UNDERSTAND THE WORLDVIEW OF THE CLIENT

Beliefs and Attitudes

1. A skilled E&D Practitioner seeks inclusion.

2. A skilled E&D Practitioner is willing to contrast his/her own beliefs and attitudes with those of their clients in a non-judgmental fashion.

3. A skilled E&D Practitioner is aware of his/her stereotypes and pre-conceived notions that they may hold toward other groups, communities and target constituencies.

Knowledge

1. A skilled E&D Practitioner possesses specific knowledge and information about the particular group that they are working with. They are aware of the life experiences, cultural heritage and historical background of their clients.

2. A skilled E&D Practitioner understands how each equality strand may affect organisational and institutional settings.

3. They have expert knowledge of socio-political influences that impinge upon their clients.

Skills

1. A skilled E&D Practitioner should familiarise themselves with relevant research and the latest findings regarding their field.

2. They should actively seek out educational experiences that enrich their knowledge, understanding and skills.

3. A skilled E&D Practitioner becomes actively involved with diverse individuals outside the work setting (community events, social and political functions, celebrations, friendships, neighbourhood groups, etc) so that their perspective is more than an academic or helping exercise.

EXPERIENCE OF DEVELOPING APPROPRIATE INTERVENTION STRATEGIES AND TECHNIQUES

Attitudes & Beliefs

1. A skilled E&D Practitioner knows how to respect clients' differences, beliefs and values.

Knowledge

1. A skilled E&D Practitioner has a clear and explicit knowledge and understanding of the key drivers for equality, diversity and non-discrimination.

2. A skilled E&D Practitioner is aware of challenges and barriers – institutional, operational and individual - that prevent organisations and individuals from accomplishing their goals and meeting their duties.

3. A skilled E&D Practitioner has comprehensive, up to date and detailed knowledge of equality, diversity and anti-discrimination.

4. A skilled E&D Practitioner is aware of relevant discriminatory practices at the social and community level as well as the corporate level that may be affecting the psychological welfare of the population being served.

Skills

1. A skilled E&D Practitioner is not tied down to only one method of analysis or intervention but is able to offer appropriate solutions to specific situations.

2. A skilled E&D Practitioner is able to exercise institutional intervention skills on behalf of their clients. They can help clients determine whether a "problem" stems from discrimination or bias in others (the concept of healthy paranoia) so that clients do not inappropriately blame themselves.

3. A skilled E&D Practitioner has training and expertise in the use of traditional

assessment and testing methodologies.

4. A skilled E&D Practitioner should attend to as well as work towards the elimination of biases, prejudices and discriminatory practices.

5. A skilled E&D Practitioner should take responsibility for educating their clients to the processes of psychological intervention, such as goals, expectations and legal rights.

Summary

1. The above framework provides potential avenues for development of standardised competencies in E&D Practitioners;

2. The study was not able to seek the detailed views of Practitioners on what may be included in such a framework and it is important that this be now subject to more detailed analysis and consultation with the sector;

3. However, as can be seen, no special educational training as such is required to meet the elementary prerequisites of E&D practice;

4. It is with this point in mind that the inclusively of E&D could be promoted by an association and the fears of some participants better laid to rest.

5. Conclusions

Constitution of the field

5.1. From the available evidence, E&D Practitioners might be categorised as being, in the main, of White British origin, female, and aged between 35 and 54. Black and ethnic minority groups are represented in large numbers vis-à-vis their national distribution.[12] However their presence, in this survey at any rate, seems low when the history of E&D is taken into account.

5.2. This is probably due to changes occurring within the field over the past decade that has seen it transform from a form of political struggle tied to Black and minority ethnic rights to a professional discipline tied to Human Resources. As was seen, this has ironically led to Black and minority ethnic E&D Practitioners feeling alienated within the field.

5.3. As a profession, E&D Practitioners have high levels of educational, vocational and professional training. The majority work in-house in the public sector and cover multiple strands of E&D. A large minority engage in practice feeling as if they lack enough training to carry out their role sufficiently.

5.4. The cause of this probably lies in the ways that E&D Practitioners develop their knowledge and training. In the absence of accredited training courses, many E&D Practitioners rely on a mix of "on-the-job" formal and informal channels, such as attending workshops and downloading information from the Internet. Although many practitioners recognised the value formal training could offer, few know of suitable courses or training programmes. Amongst highly experienced practitioners, lack of advanced training courses resulted in frustration.

5.5. The kinds of competencies and skills required for professional and proficient E&D practice were assumed to be the same regardless of sector of employment and career stage. The most important of these was considered to be social and interactive skills and the least important commercial knowledge.

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[12] National Statistics Online (http://www.statistics.gov.uk/) accessed 26 Feb. 07

Scope, function and role of an association

5.6. Support for some kind of professional association was very high. The vast majority of practitioners thought they would benefit from it with practitioners with 1 to 7 years experience thinking they would benefit the most. However, the statistical association with years of experience was low enough to suggest that all practitioners, regardless their career stage or background, could benefit so long as their needs were met.

5.7. Support for an open or vetted membership association was almost equal. Support for vetting was statistically significant when considered by years of experience, with practitioners with over 21 years experience coming out as those most in favour. However, many indicated that a mixed organisation was the best option. Again, though, statistical associations were found at a very low level only. A range of functions and services was considered useful.

5.8. Educational training and work experience would perhaps be the most valid criteria upon which to establish eligibility. However, the shortfall in existing suitable training courses, plus the absence of a national curriculum, currently makes this difficult.

5.9. A range of services and functions has general support. However, considerable problems emerged in how these might be financed. The majority of participants did not know if they were prepared to pay fees. As such, organisational forms of membership and corporate sponsorship will have to be explored further.

5.10. Finally, very few responses to items on the questionnaire were found to be significantly related to sector of employment and career stage. As such, it is likely that some form of professional identity based on shared objectives could be both used to attract potential members to an Association and be nurtured by it.

6. Recommendations

6.1. The research on which this report is based was designed to assess levels of support for an association and map the contours of the E&D field as it stands today and how an association might be organised to incorporate it. As with any good research project, more questions were raised than answers produced. This is especially true in relation to the key issue of competencies and the professionalisation of E&D, which was found to be contentious for a number of reasons. With this in mind, the following recommendations can be made:

1. Before a decision is taken to set up an association, more detailed work, included wider consultation with practitioners, should be undertaken on the value and benefits of accrediting individual practitioners as competent and fit to practice, the issue of exercising a regulatory function over the sector and the operational and professional relationship between the association and the CEHR.

2. When moves towards establishing an association are taken, two forms of membership could in the first instance be offered. The first is an open membership, whereby for a nominal fee access to information and support services are offered. The second should be in the form of a "commitment to quality" assurance certificate that can be awarded on the basis of a simple level of work experience and support from a line manager or significant client. The intention will be to move towards a more complex system of accreditation in the future and introduce the idea that recognised competencies and skills improve the public image and understanding of E&D.

3. Following development in existing educational training and new in-house courses, further and more advanced models of accreditation can be applied. These would be based on membership models found in other associations

(for example the CIPD) but stop short of chartered status. Routes for students, existing professionals and continuing development professionals would be offered.

4. Through this process the search for a national competency framework will take place via dialogue with all areas of the E&D field. Recognising the needs of different strands and even the different political aspirations (or lack thereof) of practitioners, sub-committees or groups could be established within the organisation itself. These, however, would have to be formed in such a way to deter splintering of the association into different groups.

7. Directions for future research

7.1. Participants completing the questionnaire raised a number of interesting questions not included in the original planned outcomes of this project. Other questions also presented themselves during the preparation of this report, including issues raised by members of the Focus Advisory Group to this project.

7.2. Amongst participants the most common question raised was how a professional association could overcome the contradiction between its philosophical and political roots in "opportunity for all" and the potential elitism of a vetted membership system. However, participants also recognised the importance of raising standards and the image of E&D.

7.3. It is therefore crucial to establish what is meant by "best practice." However, this will be no easy task. Other participants asked how an association would decide over controversial issues in the field: how, for example, would the association value "positive discrimination"? Some participants felt they could not join an association that advocated it, while others felt they could not join an association that did not.

7.4. In preparation of this report questions arose over the professional identity of E&D practitioners. For example, how many felt that the title summed up what they did in their professional role? How many saw it as just a part of something wider within, for example, HR or community activism? How important, indeed, would it be to have a professional identity as "E&D practitioner" as a prerequisite for joining a professional association? How could an association nurture such an identity? What would it look like?

7.5. A related question concerned the CIPD. Many practitioners are already chartered members of that body: to whom would their loyalties ultimately lie? What would happen if the CIPD and a professional E&D association issued contradictory guidelines? The potential for duplicity and conflict seems great. Clearly this risk and others mentioned in the body of this report have to be taken seriously. Whilst as already indicated that there is a clear consensus for the establishment of a professional association, it is these and

other risks that could seriously undermine its inauguration, functioning and growth. Thus, in our view, this aspect – and hence the risk analysis it entails – needs further researching.

7.6. Some of this additional thinking was initiated when the interim findings of this report were considered by members of the Focus Advisory Group to assess the implications of the major findings, determine the level of risks that could stymied the formation of the association and provide some added value by offering additional thoughts and suggestions that should form part of the strategy for implementing the findings of this report.

7.7. There was general support for the creation of an organisation of equality and diversity practitioners but the most important caveat was that such a body must be inclusive so that individual practitioners with unaccredited skills and experiences will be eligible to become members. In addition, the organisation itself will need to be flexible enough to enable this open approach to be developed and consolidated as the organisation grows and moves from an Open Network to more structured and exclusive forms.

7.8. Notwithstanding the overwhelming support for an association, caution was advised in the implementation of this finding. It is imperative that the LSC developed a structured approach to the creation of the association as its success will be determined by the extent to which its targeted members are willing to buy into the idea. As part of this strategy, the Advisory Group recommends that the LSC consider the following:

- More detailed considerations, research and planning must be addressed before any steps are taken to set up this organisation.

- One of the initiatives recommended is a targeted programme of facilitated networking to generate interest in the idea, explore further issues and nurture a positive synergy among and between potential members.

- More detailed and widespread discussions with employers and trade unions should be initiated to incorporate their views, secure their buy in and thus enable the association to grow and become embedded as part of mainstream activities and operational relationships within organisations employing members of the association.

- If the CEHR is critical to the setting and monitoring of standards and good

practice for those individuals and organisations involved in the delivery of equality and diversity, its role in the funding, development and regulation of the association must be defined, clarified and agreed by practitioners.

7.9. Finally, years of experience was discovered to be insignificant or have very low, often marginal, significance in shaping participants' responses to questions. What, then, was to account for the differences in responses? Were they just the result of random variables or were they result of some significant variable as yet undiscovered? Although support for an association seems high, these questions, in addition to the ones above, will need further serious examination if what is eventually to be established will have broad and lasting appeal to all practitioners working on equality and diversity issues.

Appendix A: Statistical Findings

Although strictly speaking tests of statistical significance should only be carried out on randomly-obtained data it was felt that, in line with common practice in academic social research,[13] the sample size obtained and kinds of information collected warranted their use. As such, chi square (χ^2) was used to establish significance and, if found, Cramer's *V* was used to measure association. *Sector of employment* and/or y*ears of experience working within the E&D field* were used as independent variable used to measure significance of all dependent variables. The null hypothesis (H°) was that "*sector of employment/years of experience* does not affect the opinions of E&D practitioners". As already stated, however, the aim of the research project was to establish whether agreement could be found across the E&D field *regardless years of experience,* and so we were in fact *not* interested in rejecting the null hypothesis in this case.

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[13] A number of arguments exist that are for and against the use of statistical significance tests on non-random samples. We believe that they are valid so long as the purpose is to address possible associations rather than making strong statements concerning causation, and such tests are kept simple.

Tables 1i to 1v: Males – personal characteristics

1i. Age

	16 to 24	25 to 34	35 to 44	45 to 54	55 plus
■ Percentage	2.2	8.9	24.4	40.0	24.4

1ii. Race/Ethnicity

	Ind	Paki	Bl Carib	Bl Ot	Mi Wh	Mi Ot	W Brit	W Iri	W Ot
■ Perce	1	2	6	4	6	6	5	2	4

1iii. Religion

Percentage	Atheist	Buddhist	Christian	Hindu	Jewish	Muslim	Other	Prefer not to say
	37.8	2.2	33.3	8.9	2.2	4.4	8.9	2.2

1iv. Sexuality

Percentage	Heterosexual	Homosexual	Bisexual	Prefer not to say
	86.7	4.4	2.2	6.7

1v. Disability

	Yes	No
▪ Percentage	20	80
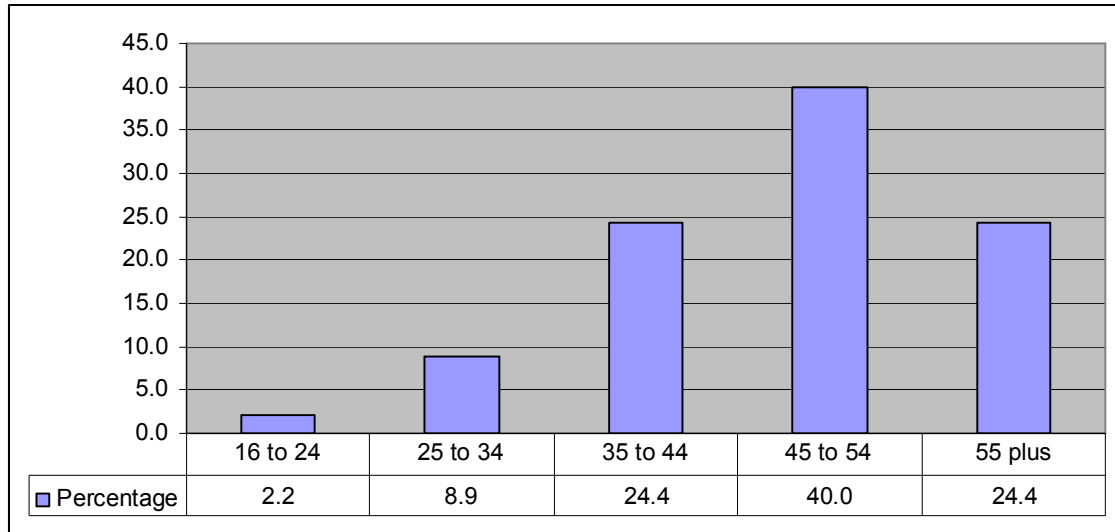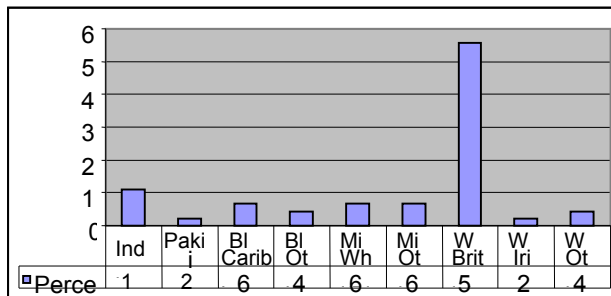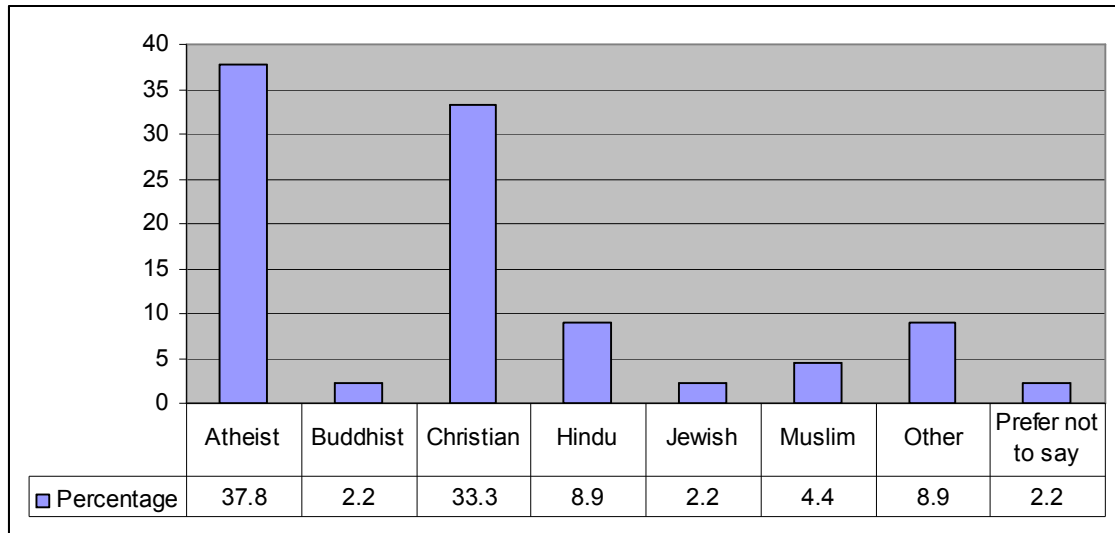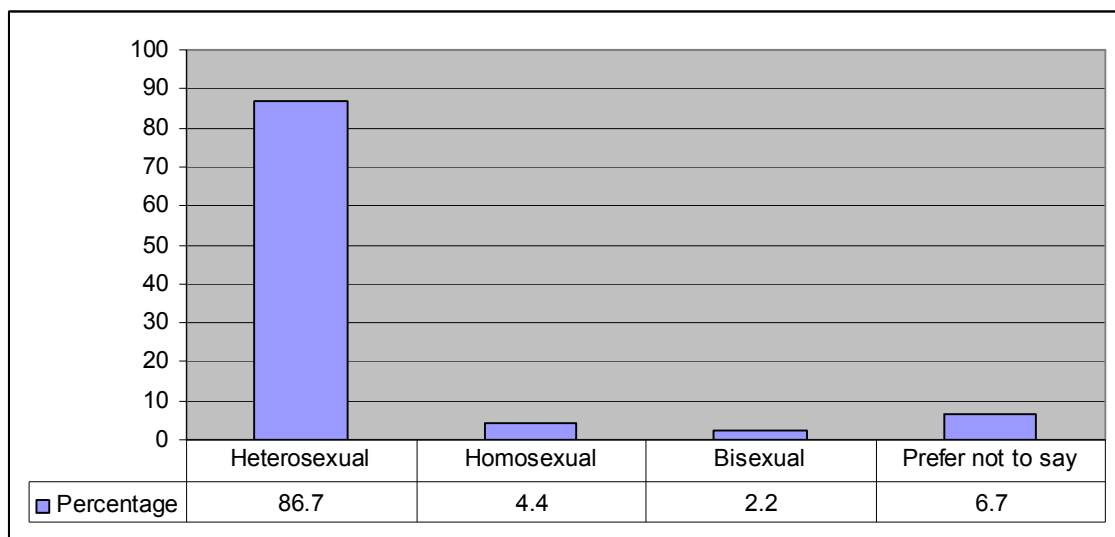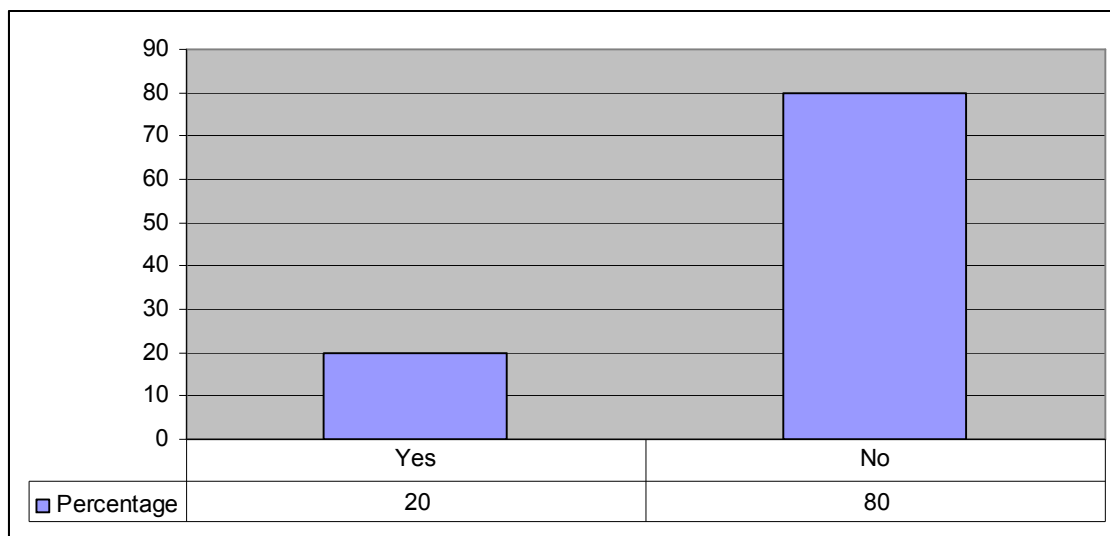
Tables 2i to 2v: Females – personal characteristics

2i. Age

	16 to 24	25 to 34	35 to 44	45 to 54	55 plus
▪ Percentage	0.8	15.9	24.6	39.7	19

2ii. Race/Ethnicity

Percentage	Indian	Black Carribean	Black African	Mixed White/Bla	Mixed Other	White British	White Irish	White Other
	5.6	7.1	2.4	1	1	79.4	2.4	1

2iii. Religion

Percentage	Atheist	Buddhist	Christian	Hindu	Jewish	Sikh	Other	Prefer not to say
	39.7	0.8	44.4	4	1.6	0.8	2.4	6.3

2iv. Sexuality

	Heterosexual	Lesbian	Bisexual	Prefer not to say
Percentage	84.9	4	0	11.1

2v. Disability

	Yes	No	Prefer not to say
Percentage	12.7	86.5	0.8
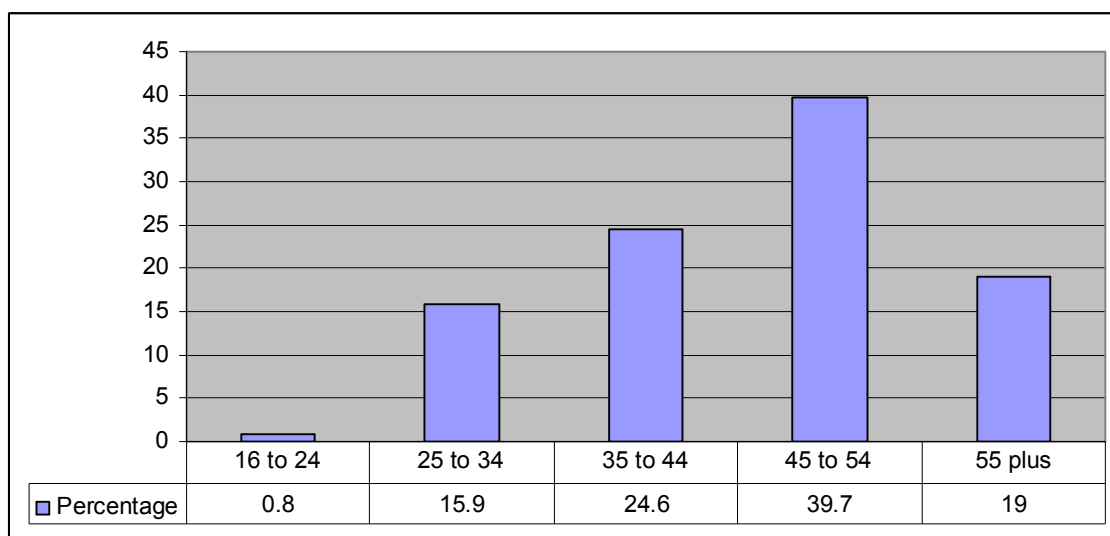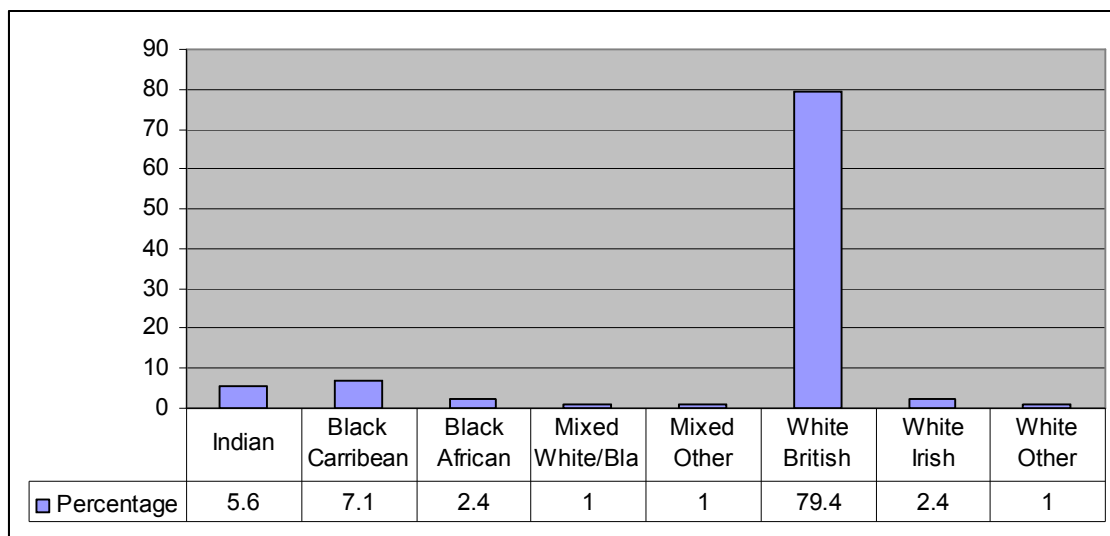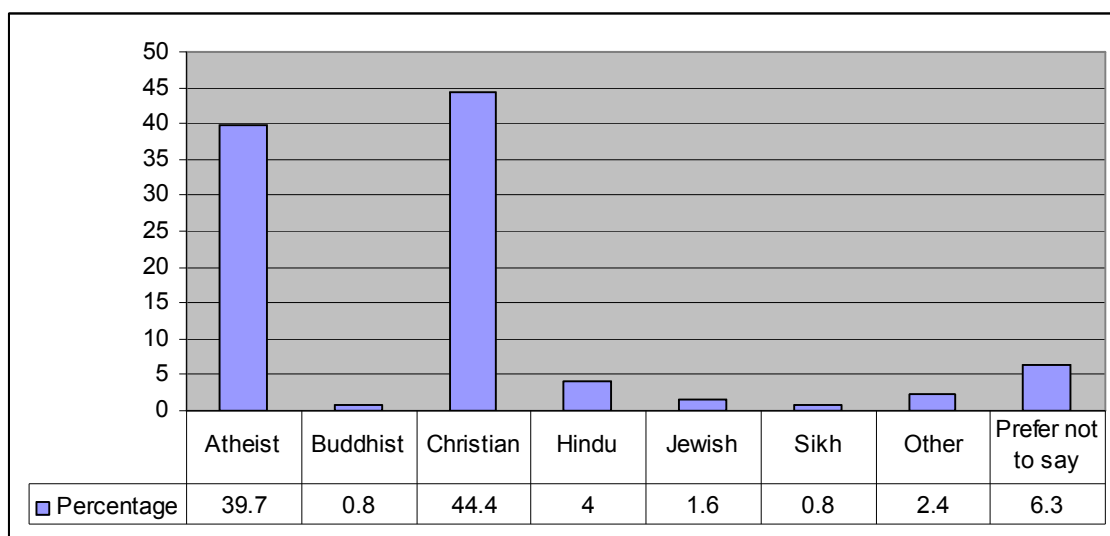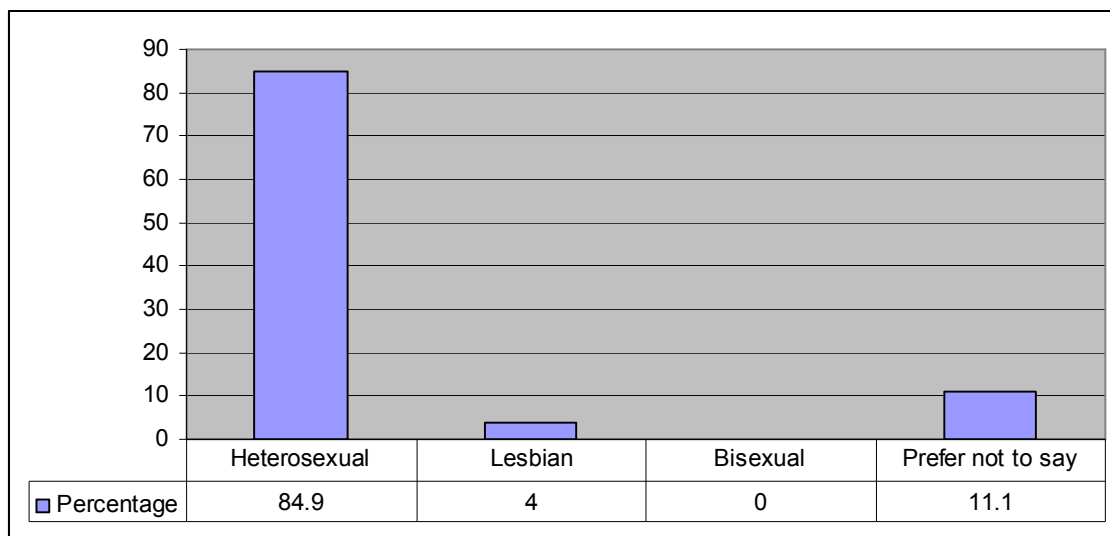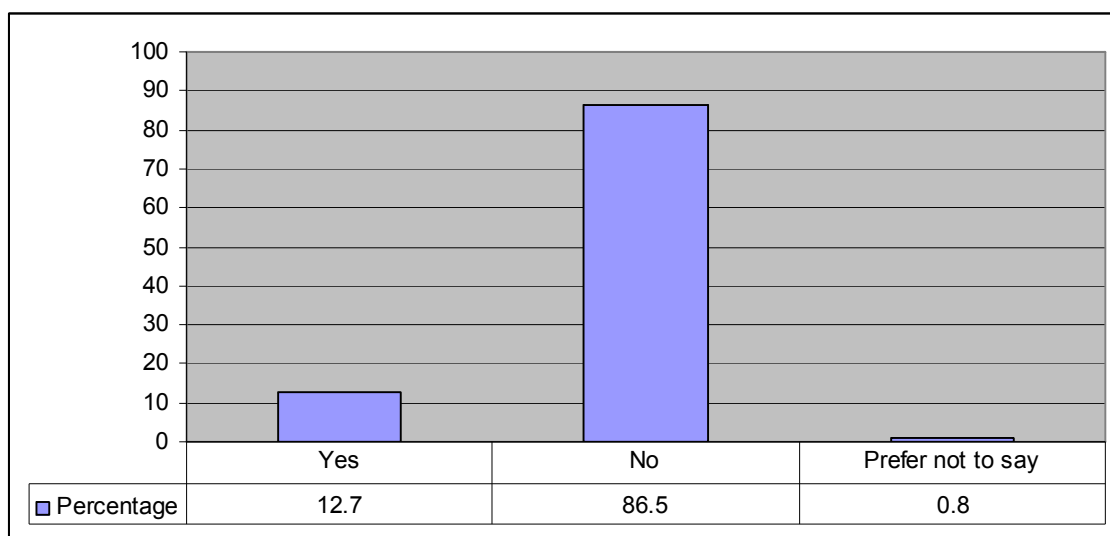
3 Tables 3i and Figures 3ii to 3ix: Professional characteristics

3i. Job Titles

Job Title	%	Job Title	%
Head of E&D/Principal E&D Officer	39.0	Development E&D Manager	0.7
E&D Officer	15.8	Account/Project Manager	0.7
E&D Advisor	13.0	Org. Development Manager	0.7
E&D Co-ordinator	4.8	Employment Relations Officer	0.7
Diversity Consultant	3.4	Voluntary Worker	0.7
HR Manager	3.4	Education Consultant	0.7
HR Consultant	2.7	Legal Assistant	0.7
HR Diversity Consultant	1.4	Police Inspector	0.7
E&D Company Director	1.4	Learning & Organisational Development Consultant	0.7
Senior Lecturer	0.7	Public Policy/Campaigns Head	0.7
Senior Officer	0.7	Marketing Co-ordinator	0.7
Partner Diversity	0.7		100.0%
Director, Student Services & External Relations	0.7		
Head of Labour Affairs	0.7		
National Director, Ed, NHS	0.7	N = 147	

3ii. Employment Sectors – single sector workers

Percentage	Public	Private	Voluntary	Charity	Independent
	81.7	9.7	3.3	2.4	2.9
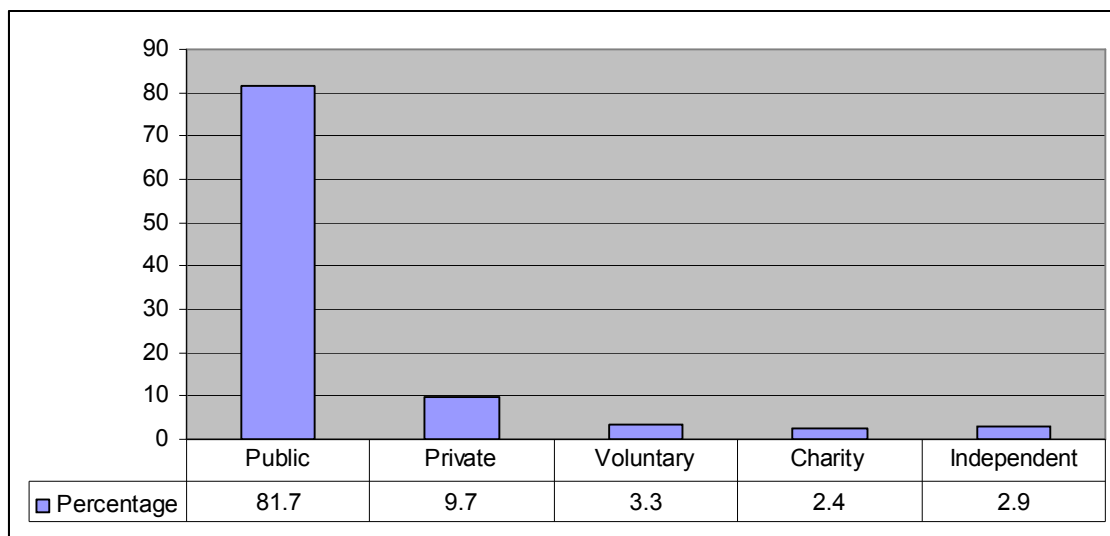
3iii. Employment sectors – multiple sector workers

Percentage	Public	Private	Voluntary	Charity	Independent
	82.9	68.6	45.7	54.3	51.4
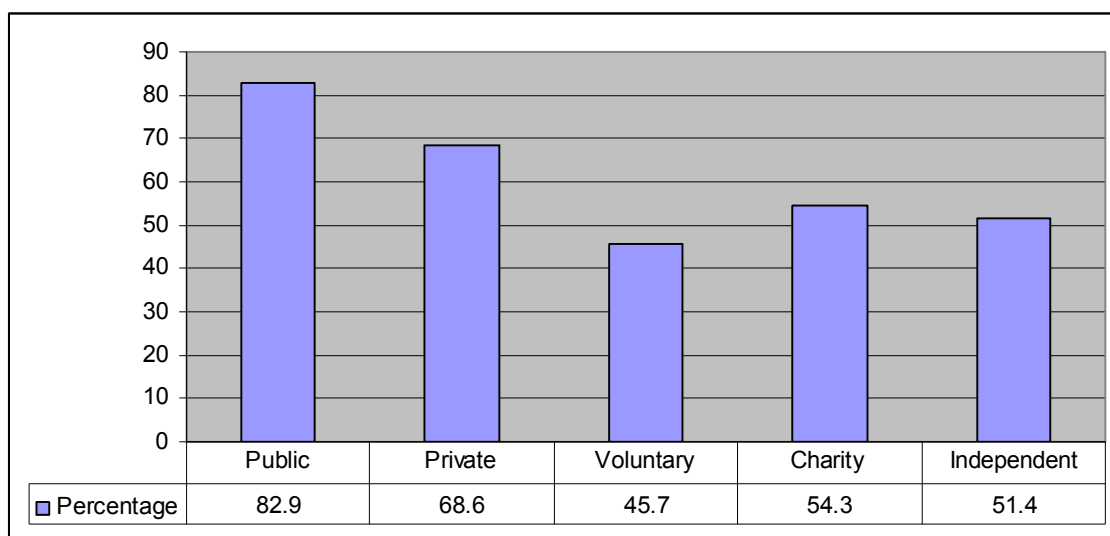
3iv. Focus of role – single sector workers

Percentage	Full	Part
	73.1	26.9
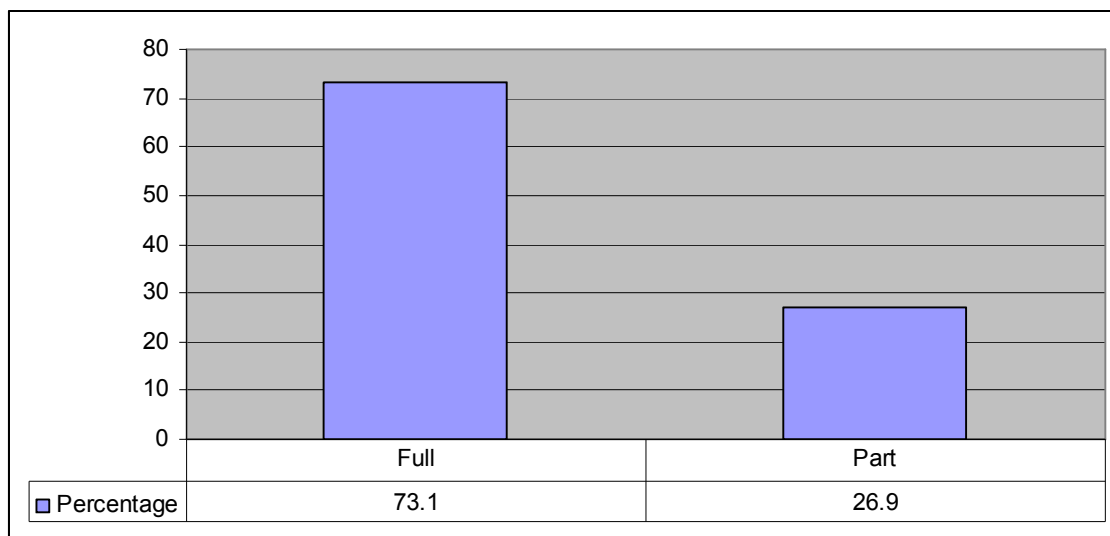
3v. Focus of role – multiple sector workers

Percentage	Full	Part
	80	20
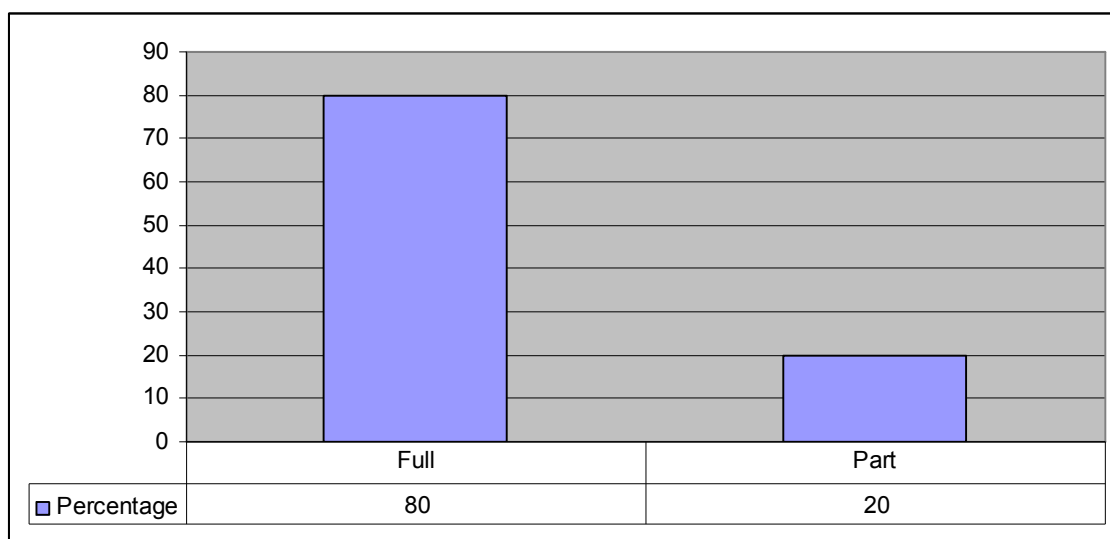
3vi. Direction of role – single sector workers

Percentage	In-house	External	Both
	85.7	9.5	4.8
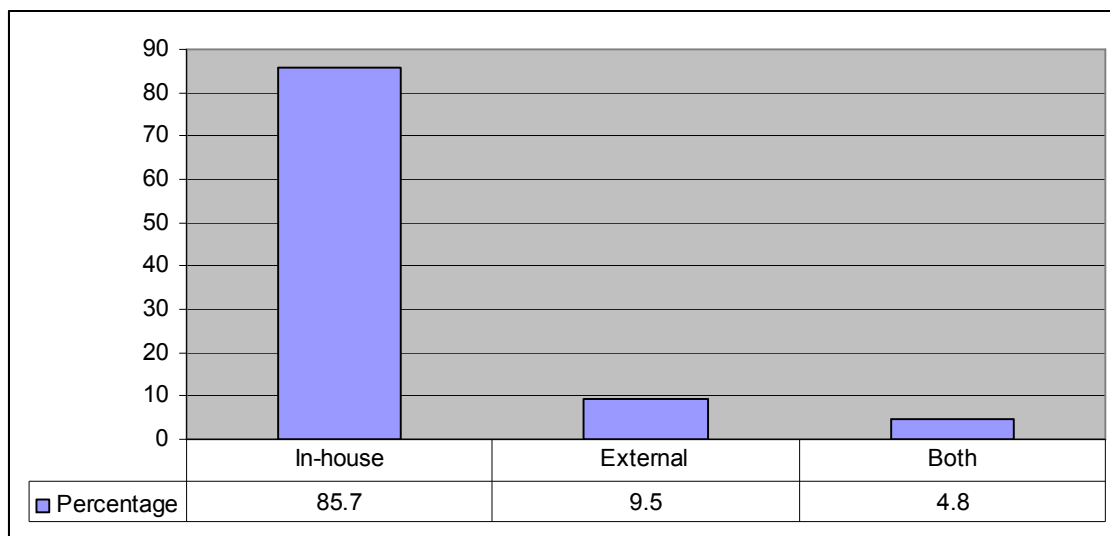
3vii. Direction of role – multiple sector workers

Percentage	In-house	External	Both
	56.4	35.9	7.7
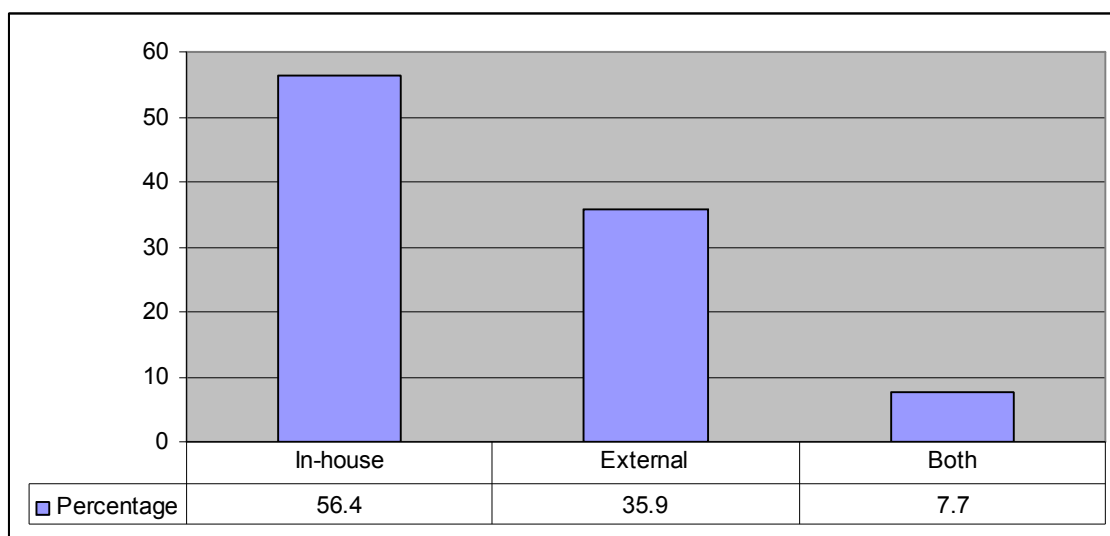
3viii. Responsibilities – single sector workers

Percentage	Advisor	Trainer	Consultant	Project/Accounts Manager	Researcher	Other
	64	41.7	40.6	29.7	29.1	28
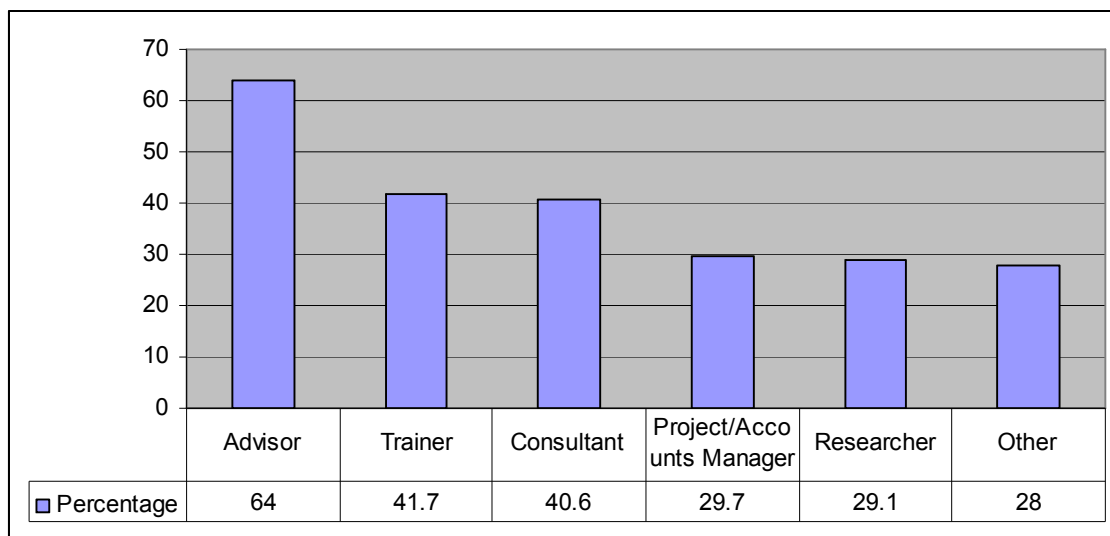
ix. Responsibilities – multiple sector workers

Percentage	Advisor	Trainer	Consultant	Project/Accounts Manager	Researcher	Other
	68.6	68.6	68.6	37.1	28.6	47.7
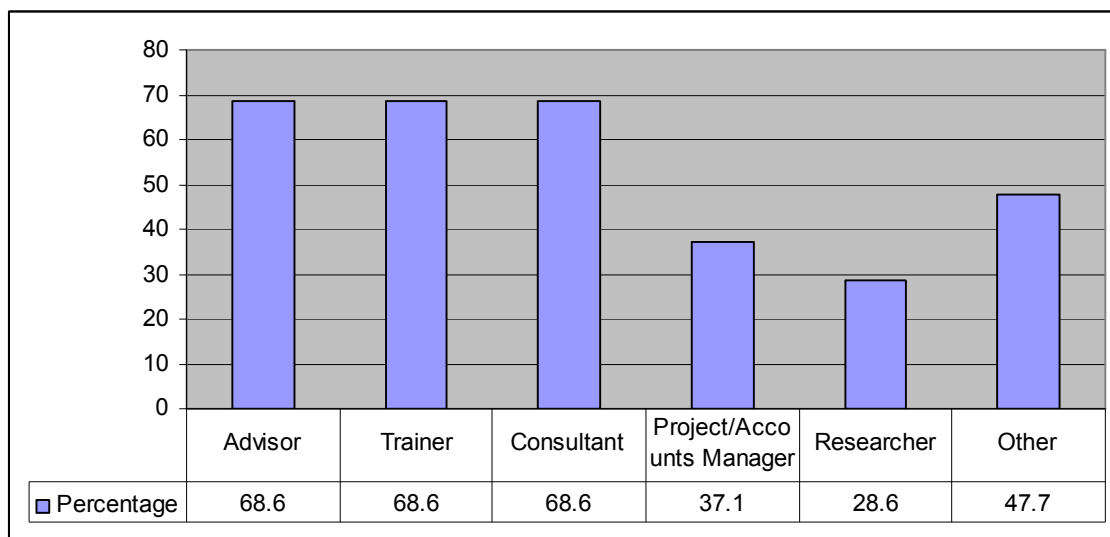
Figures 4i and 4ii and Tables 5i to 5x and 6i to 6x: Training & Competencies

4i. Academic training

Percentage	GCSE	A Levels	HND	BA/BSc	Post-grad. Dip	MA/MSc	PhD	Other
	2.9	6.7	1.4	32.4	12.4	38.6	2.4	3.3
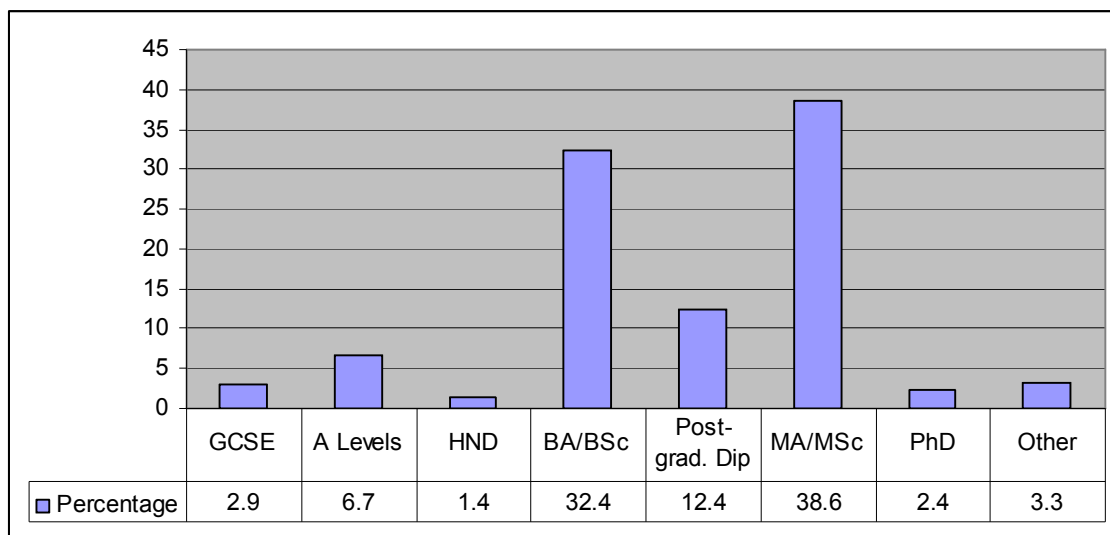
4ii. Areas of principal academic training

Percentage	Arts	Humanities	Natural Sciences	Social Sciences	Business Studies	None	Other
	16.6	20.5	7.1	38.6	45.2	9	9.5
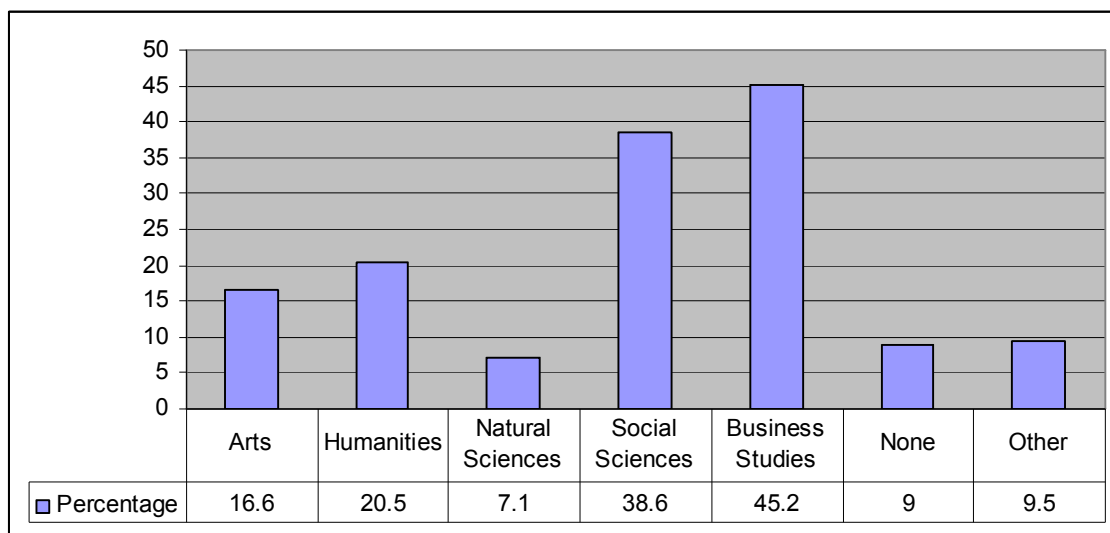
5. Competencies and skills – employment sector

5i. Social and interactive skills

	EMPLOYMENT SECTOR		
	SINGLE	MULTIPLE	TOTALS
1 TO 3	0.6	2.9	1.0
4	17.1	20.6	17.7
5	82.3	76.5	81.3
TOTALS	100.0	100.0	100.0
N= 198; chi obtained = 0.323			

5ii. Managerial competencies

	EMPLOYMENT SECTOR		
	SINGLE	MULTIPLE	TOTALS
1 TO 3	13.8	17.6	14.4
4	38.9	41.2	39.3
5	47.3	41.2	46.3
TOTALS	100.0	100.0	100.0
N= 201; chi obtained = 0.287			

5iii. Critical and evaluative competencies

	EMPLOYMENT SECTOR		
	SINGLE	MULTIPLE	TOTALS
1 TO 3	5.4	14.3	6.9
4	47.3	48.6	47.5
5	47.3	37.1	45.5
TOTALS	100.0	100.0	100.0
N= 202; chi obtained = 0.781			

5iv. Subject/content knowledge

	EMPLOYMENT SECTOR		
	SINGLE	*MULTIPLE*	*TOTALS*
1 TO 3	4.2	8.8	5.0
4	28.9	23.5	28.0
5	66.9	67.6	67.0
TOTALS	100.0	100.0	100.0
N = 200; chi obtained = 0.324			

5v. Writing/report writing skills

	EMPLOYMENT SECTOR		
	SINGLE	*MULTIPLE*	*TOTALS*
1 TO 3	11.5	18.2	12.6
4	50.3	57.6	51.5
5	38.2	24.2	35.9
TOTALS	100.0	100.0	100.0
N = 198; chi obtained = 1.831			

5vi. Discipline (time-keeping/efficiency)

	EMPLOYMENT SECTOR		
	SINGLE	*MULTIPLE*	*TOTALS*
1 TO 3	15.7	18.2	16.1
4	44.6	42.4	44.2
5	39.8	39.4	39.7
TOTALS	100.0	100.0	100.0
N = 199; chi obtained = 0.038			

5vii. Context knowledge

	EMPLOYMENT SECTOR		
	SINGLE	*MULTIPLE*	*TOTALS*
1 TO 3	9.7	6.1	9.1
4	29.1	36.4	30.3
5	61.2	57.6	60.6
TOTALS	100.0	100.0	100.0
N = 198; chi obtained = 0.557			

5viii. Objectivity

	EMPLOYMENT SECTOR		
	SINGLE	*MULTIPLE*	*TOTALS*
1 TO 3	11.7	15.6	12.3
4	36.8	25.0	34.9
5	51.5	59.4	52.8
TOTALS	100.0	100.0	100.0
N = 195; chi obtained = 1.401			

5ix. Analytical skills

	EMPLOYMENT SECTOR		
	SINGLE	*MULTIPLE*	*TOTALS*
1 TO 3	5.4	9.1	6.0
4	51.5	69.7	54.5
5	43.1	21.2	39.5
TOTALS	100.0	100.0	100.0
N = 200; chi obtained = 5.039			

5x. Commercial knowledge

	EMPLOYMENT SECTOR		
	SINGLE	*MULTIPLE*	*TOTALS*
1 TO 3	37.9	39.4	38.1
4	37.3	51.5	39.7
5	24.8	9.1	22.2
TOTALS	100.0	100.0	100.0
N = 194; chi obtained = 4.47			

6. Competencies and skills – years of experience

6i. Social and interactive skills

	YEARS OF EXPERIENCE		
	SINGLE	MULTIPLE	TOTALS
1 TO 3	1.9	0.0	0.0
4	15.7	8.2	16.7
5	82.4	91.8	83.3
TOTALS	100.0	100.0	100.0
N=200; chi obtained = 6.765			

6ii. Managerial competencies

	YEARS OF EXPERIENCE		
	SINGLE	MULTIPLE	TOTALS
1 TO 3	13.8	10.2	22.2
4	36.7	38.8	38.9
5	49.5	51.0	38.9
TOTALS	100.0	100.0	100.0
N = 201; chi obtained = 3.193			

6iii. Critical and evaluative competencies

	YEARS OF EXPERIENCE		
	SINGLE	MULTIPLE	TOTALS
1 TO 3	6.4	8.0	0.0
4	50.5	44.0	66.7
5	43.1	48.0	33.3
TOTALS	100.0	100.0	100.0
N = 202; chi obtained = 13.767**			

6iv. Subject/content knowledge

	YEARS OF EXPERIENCE		
	SINGLE	*MULTIPLE*	*TOTALS*
1 TO 3	4.6	0.0	11.1
4	28.7	38.8	22.2
5	66.7	61.2	66.7
TOTALS	100.0	100.0	100.0
N = 200; chi obtained = 11.591			

6v. Writing/report writing skills

	YEARS OF EXPERIENCE		
	SINGLE	*MULTIPLE*	*TOTALS*
1 TO 3	12.1	12.2	16.7
4	48.6	55.1	44.4
5	39.3	32.7	38.9
TOTALS	100.0	100.0	100.0
N = 197; chi obtained = 4.179			

6vi. Discipline (time-keeping/efficiency)

	YEARS OF EXPERIENCE		
	SINGLE	*MULTIPLE*	*TOTALS*
1 TO 3	13.9	8.2	16.7
4	38.9	53.1	55.6
5	47.2	38.8	27.8
TOTALS	100.0	100.0	100.0
N = 199; chi obtained = 9.867			

6vii. Context knowledge

	YEARS OF EXPERIENCE		
	SINGLE	*MULTIPLE*	*TOTALS*
1 TO 3	7.5	6.3	16.7
4	30.2	33.3	44.4
5	62.3	60.4	38.9
TOTALS	100.0	100.0	100.0
N = 196; chi obtained = 8.313			

6viii. Objectivity

	YEARS OF EXPERIENCE		
	SINGLE	MULTIPLE	TOTALS
1 TO 3	13.2	14.9	5.6
4	34.0	29.8	38.9
5	52.8	55.3	55.6
TOTALS	100.0	100.0	100.0
N = 195; chi obtained = 4.30			

6ix. Analytical skills

	YEARS OF EXPERIENCE		
	SINGLE	MULTIPLE	TOTALS
1 TO 3	6.5	4.1	5.6
4	54.6	57.1	61.1
5	38.9	38.8	33.3
TOTALS	100.0	100.0	100.0
N = 200; chi obtained = 2.84			

6x. Commercial knowledge

	YEARS OF EXPERIENCE		
	SINGLE	MULTIPLE	TOTALS
1 TO 3	35.6	34.8	50.0
4	37.5	37.0	44.4
5	26.9	28.3	5.6
TOTALS	100.0	100.0	100.0
N = 191; chi obtained = 4.477			

Tables 7i to 7iv: Opportunities for professional development

7i. Formal routes

	College course	Private course	In-house training	Other
Percentage	18.1	52.4	41.9	40

7ii. Informal routes

	Trade lit.	Meetings/seminars	Social networks	Other
Percentage	66.2	92.4	75.6	24.8
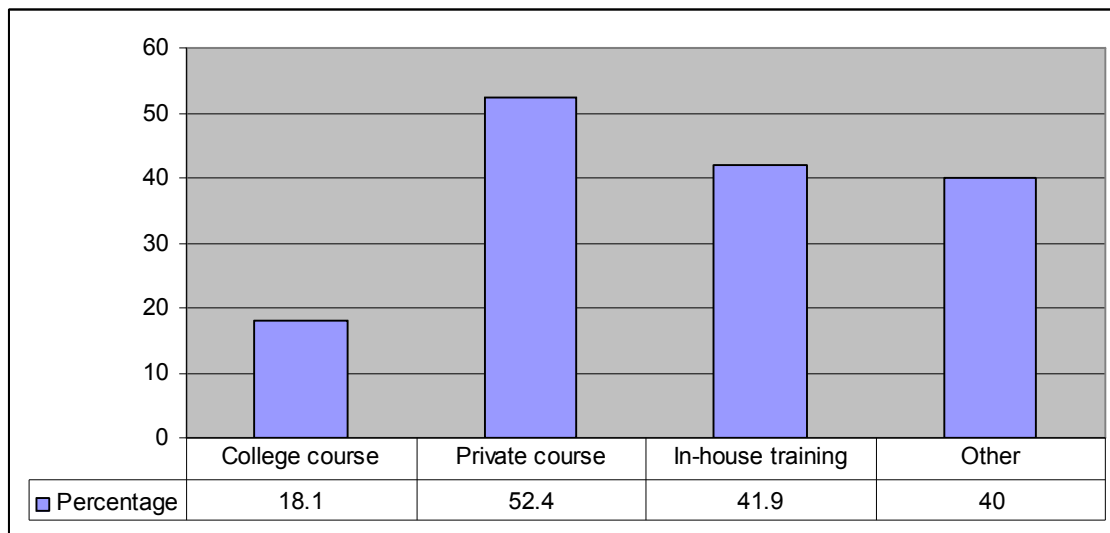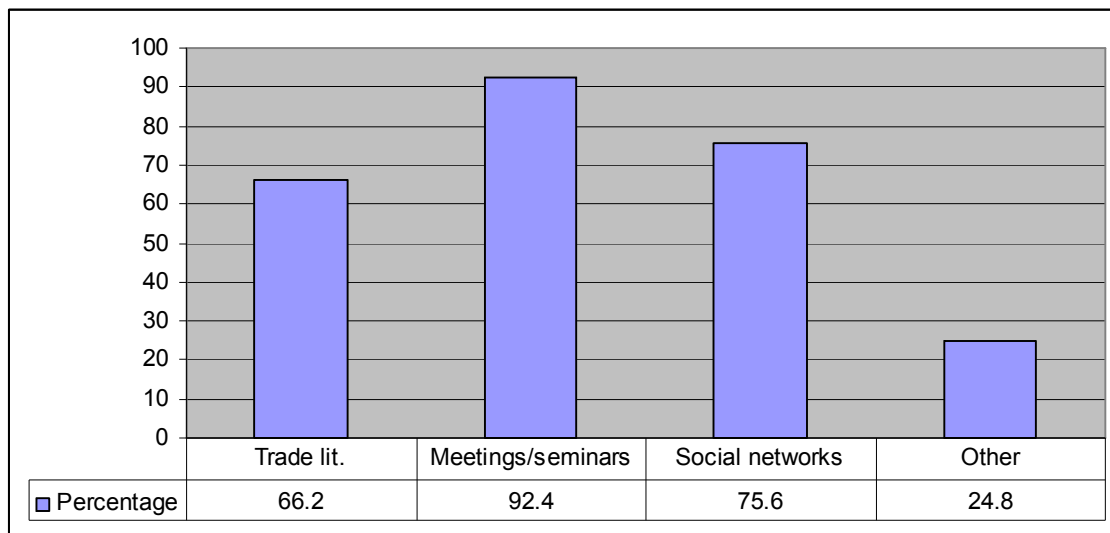
7iii. Period of knowledge/training refreshment

	Every year	Every 5 years	Every 10 years	Continously
Percentage	50.5	4.3	0	45.2

7iv. Selection criteria

	Cost	Location	Accreditation	Recommendation	Sponsoring body	Other
Percentage	57.1	38.6	19	76.7	15.2	19.5
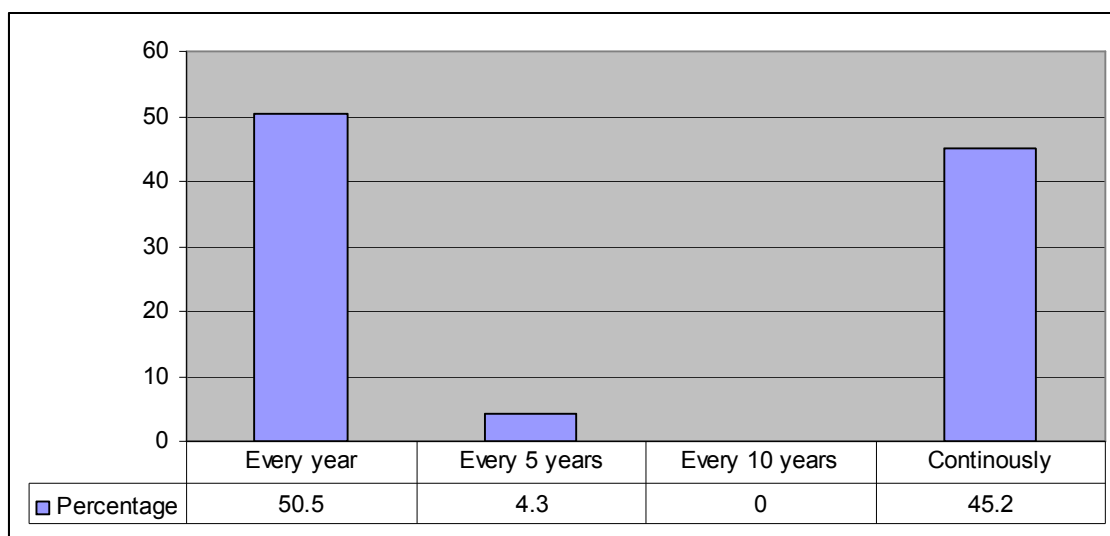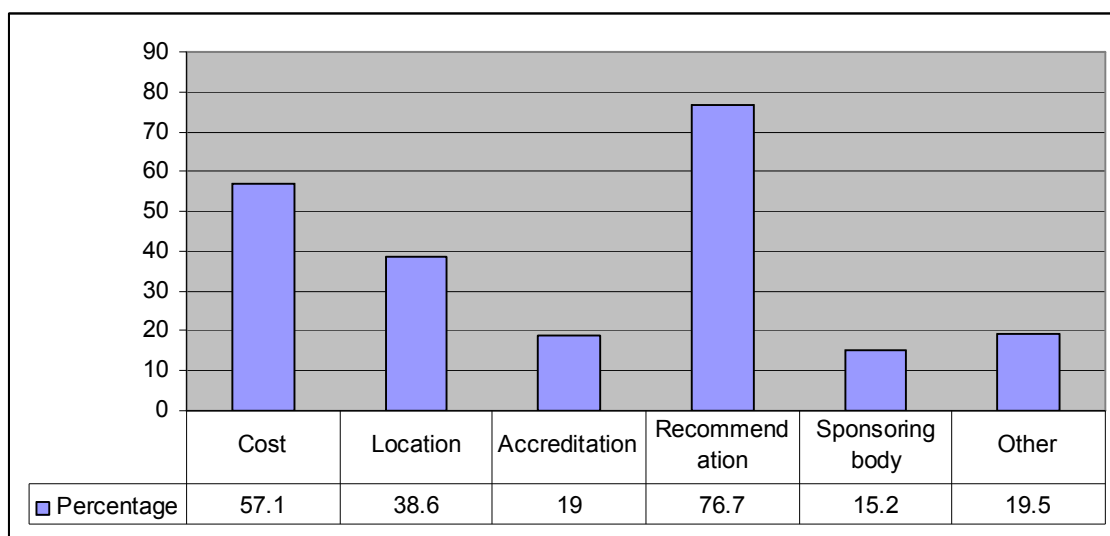
Figures and Tables 8i to 8iii, 9i to 9v, 10i to 10ix and 11: Scope, function and role of an association

8i. Support for an association

	Yes	No	Don't know
■ Percentage	78.6	5.7	15.7
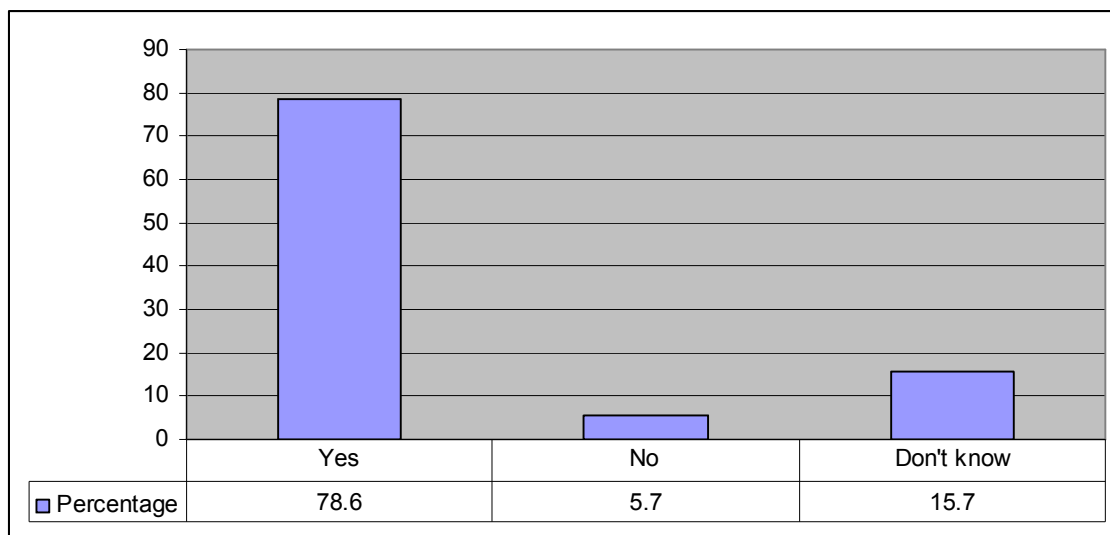
	YEARS OF EXPERIENCE				
	0 to 7	*8 to 14*	*15 to 21*	*22+*	*TOTALS*
For	79.8	76.5	73.7	80.8	78.6
Against	3.5	5.9	15.8	7.7	5.7
Don't know	16.7	17.6	10.5	11.5	15.7
TOTALS	100	100	100	100	100.0
N = 210; chi obtained = 8.21					

8ii. Expected beneficiaries

	Yes	No	Don't know
☐ Percentage	70.5	9	20.5
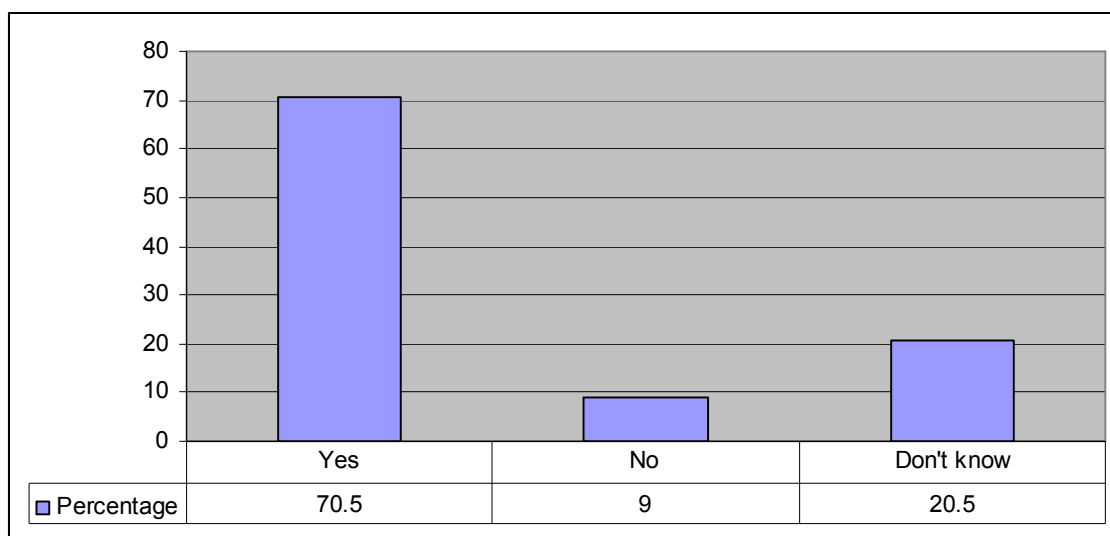
	YEARS OF EXPERIENCE				
	0 to 7	8 to 14	15 to 21	22+	TOTALS
Yes	75.4	62.7	63.2	69.2	70.5
No	6.1	9.8	21.1	11.5	9.0
Don't know	18.4	27.5	15.8	19.2	20.5
TOTALS	100	100	100	100	100.0
N = 210; chi obtained = 13.58; V = 0.18					

8iii. Models of associational organisation

	Open	Member	Chartered	Mix
Percentage	46.5	12.6	18.7	22.2
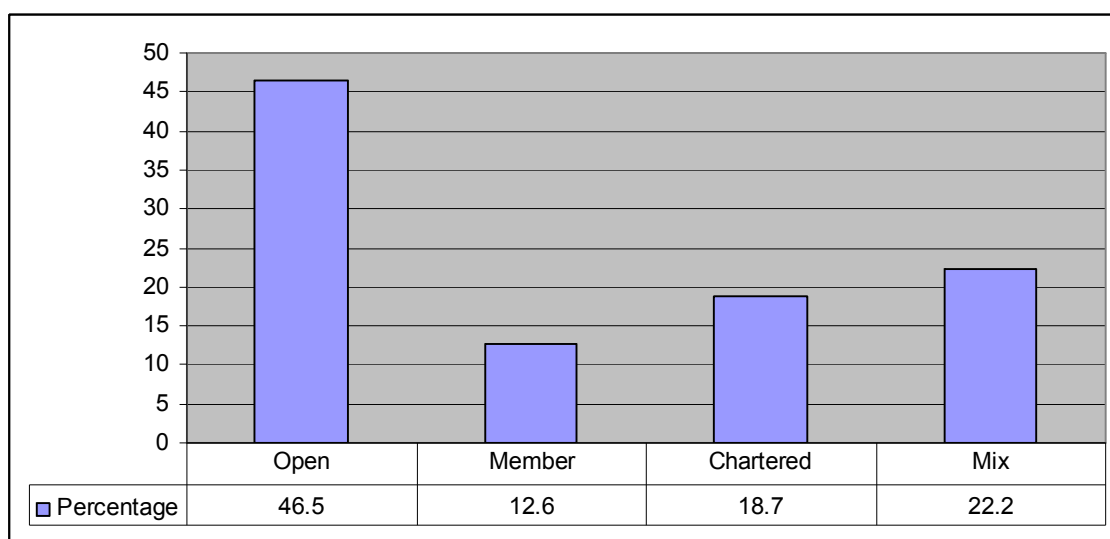
	YEARS OF EXPERIENCE				
	0 to 7	*8 to 14*	*15 to 21*	*22+*	*TOTALS*
Open	51.8	45.8	37.5	29.2	46.5
Member	10.0	20.8	12.5	8.3	12.6
Chartered	15.5	12.5	37.5	33.3	18.7
Mix	22.7	20.8	12.5	29.2	22.2
TOTALS	100.0	100.0	100.0	100.0	100.0
N = 198; chi obtained = 19.75; V = 0.18					

9. Accreditation

9i. Length of time/experience working within the E&D field

	YEARS OF EXPERIENCE			
	0 to 7	8 to 14	15 to 21	22+
Very unimportant	11.3	3.9	10.0	0.0
Fairly unimportant	7.5	3.9	0.0	0.0
Neutral	15.1	23.1	20.0	5.9
Fairly important	34.0	34.6	30.0	41.2
Critically important	15.1	19.2	10.0	29.4
Don't know	17.0	15.4	30.0	23.5
TOTALS	100.0	100.1	100.0	100.0
N = 106; chi obtained = 11.45				

9ii. Qualifications and training

	YEARS OF EXPERIENCE			
	0 to 7	8 to 14	15 to 21	22+
Very unimportant	7.5	0.0	0.0	0.0
Fairly unimportant	5.7	11.5	0.0	5.9
Neutral	24.5	23.1	10.0	5.9
Fairly important	45.3	42.3	50.0	41.2
Critically important	1.9	7.7	10.0	29.4
Don't know	15.1	15.4	30.0	17.6
TOTALS	100.0	100.0	100.0	100.0
N = 106; chi (obtained) = 34.59; V = 0.33				

9iii. Being from the target group you specialise in

	YEARS OF EXPERIENCE			
	0 to 7	8 to 14	15 to 21	22+
Very unimportant	20.8	30.8	30.0	11.8
Fairly unimportant	16.9	15.4	0.0	0.0
Neutral	20.8	19.2	20.0	23.5
Fairly important	16.9	11.5	20.0	41.2
Critically important	5.7	3.8	0.0	5.9
Don't know	18.9	19.2	30.0	17.6
TOTALS	100.0	100.0	100.0	100.0
N = 106; chi (obtained) = 25.06; V = 0.28				

9iv. Number of projects worked on

	YEARS OF EXPERIENCE			
	0 to 7	8 to 14	15 to 21	22+
Very unimportant	15.1	3.8	0.0	5.9
Fairly unimportant	17.0	23.1	10.0	5.9
Neutral	32.1	38.5	50.0	35.3
Fairly important	13.2	15.4	10.0	29.4
Critically important	3.8	0.0	0.0	11.8
Don't know	18.9	19.2	30.0	11.8
Totals	100.1	100.0	100.0	100.1
N = 106; chi (obtained) = 27.17; V = 0.29				

9v. An accreditation by a certified body

	YEARS OF EXPERIENCE			
	0 to 7	8 to 14	15 to 21	22+
Very unimportant	7.5	7.7	0.0	0.0
Fairly unimportant	13.2	11.5	0.0	5.9
Neutral	26.4	26.9	30.0	23.5
Fairly important	24.5	23.1	30.0	23.5
Critically important	11.3	0.0	10.0	23.5
Don't know	17.0	30.8	30.0	23.5
Totals	100.0	100.0	100.0	100.0
N = 106; chi (obtained) = 22.28				

10. Functions and services
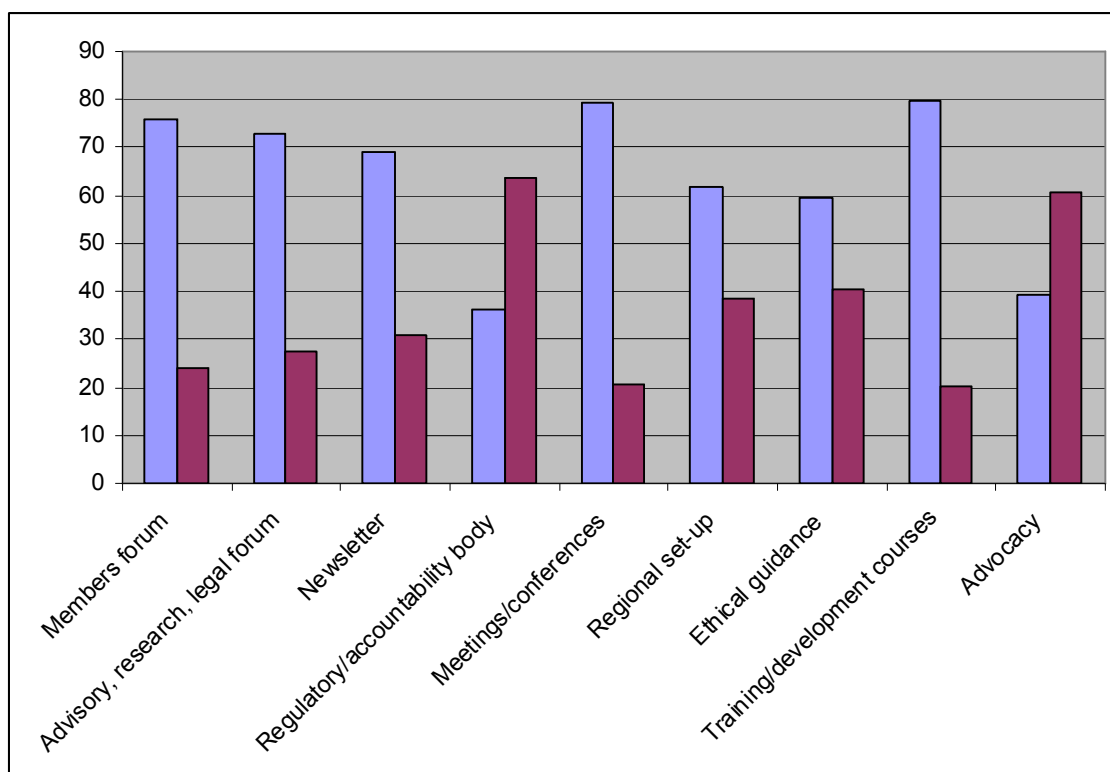
10i. Members forum

	YEARS OF EXPERIENCE			
	0 to 7	8 to 14	15 to 21	22+
Yes	77.3	64.6	87.5	83.3
No	22.7	35.4	12.5	16.7
TOTALS	100.0	100.0	100.0	100.0
N = 198; chi (obtained) = 5.34				

10ii. Advisory, research and legal forum

	YEARS OF EXPERIENCE			
	0 to 7	8 to 14	15 to 21	22+
Yes	77.3	64.6	87.5	62.5
No	22.7	35.4	12.5	37.5
TOTALS	100.0	100.0	100.0	100.0
N = 198; chi (obtained) = 3.19				

10iii. Members newsletter

	YEARS OF EXPERIENCE			
	0 to 7	8 to 14	15 to 21	22+
Yes	77.3	64.6	87.5	66.7
No	22.7	35.4	12.5	33.3
TOTALS	100.0	100.0	100.0	100.0
N = 198; chi (obtained) = 4.48				

10iv. Regulatory/accountability body

	YEARS OF EXPERIENCE			
	0 to 7	8 to 14	15 to 21	22+
Yes	36.4	33.3	37.5	41.7
No	63.6	67.7	62.5	58.3
TOTALS	100.0	101.0	100.0	100.0
N = 198; chi (obtained) = 9.24; V = 0.1				

10v. Meetings and conferences

	YEARS OF EXPERIENCE			
	0 to 7	8 to 14	15 to 21	22+
Yes	77.3	77.1	100.0	79.2
No	22.7	22.9	0.0	20.8
TOTALS	100.0	100.0	100.0	100.0
N = 198; chi (obtained) = 6.21				

10vi. A regional/local set-up

	YEARS OF EXPERIENCE			
	0 to 7	8 to 14	15 to 21	22+
Yes	60.0	64.6	68.8	58.3
No	40.0	35.4	31.3	41.7
TOTALS	100.0	100.0	100.1	100.0
N = 198; chi (obtained) = 0.76				

10vii. Ethical guidance

	YEARS OF EXPERIENCE			
	0 to 7	8 to 14	15 to 21	22+
Yes	62.7	54.2	68.8	50.0
No	37.3	45.8	31.3	50.0
TOTALS	100.0	100.0	100.1	100.0
N = 198; chi (obtained) = 2.51				

10viii. Members training/development courses

	YEARS OF EXPERIENCE			
	0 to 7	8 to 14	15 to 21	22+
Yes	80.9	83.3	81.3	66.7
No	19.1	16.7	18.8	33.3
TOTALS	100.0	100.0	100.1	100.0
N = 198; chi (obtained) = 7.2				

10ix. Advocacy

	YEARS OF EXPERIENCE			
	0 to 7	8 to 14	15 to 21	22+
Yes	41.8	37.5	31.3	37.5
No	58.2	62.5	68.8	62.5
TOTALS	100.0	100.0	100.1	100.0
N = 198; chi (obtained) = 0.84				

11. Membership fees

	Yes	No	Don't know
■ Percentage	37.9	8.6	53.5
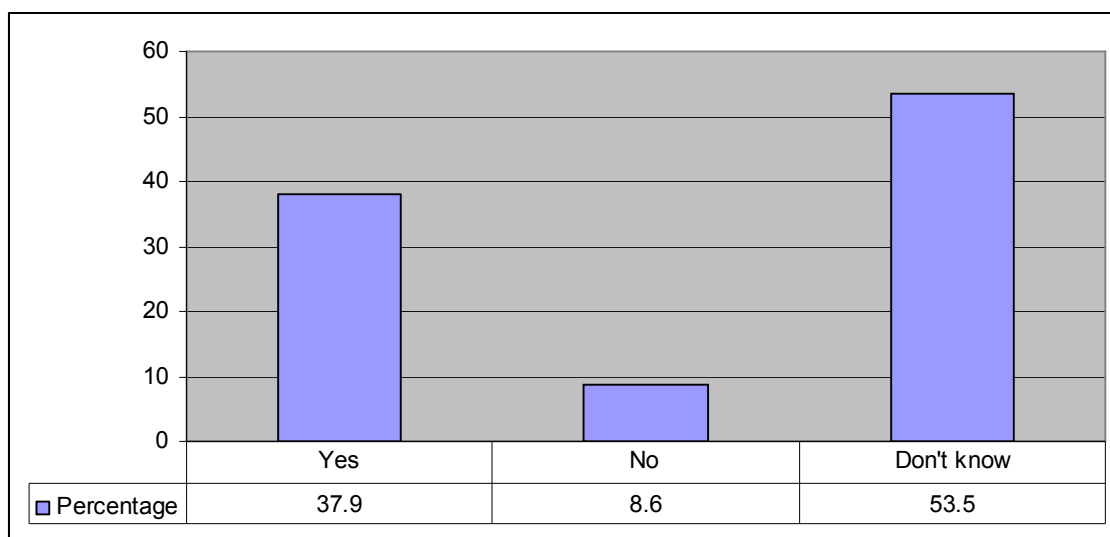
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Appendix C: Questionnaire

Dear Colleague

We have been contracted by the Learning & Skills Council to conduct a study on the feasibility of establishing a professional body for diversity practitioners in the UK. The study will seek to establish the viability of such a body, and this survey is the first stage in this process. The Equal Development Partnership is part funded by the European Social Fund under the Equal Community Initiative Programme.

You are one of a number of individuals whose opinions on this matter we would greatly value, and we would therefore be very grateful if you would be kind enough to complete the following questionnaire.

The questionnaire should take only 10 to 15 minutes of your time to complete. May we suggest that you complete the questions at a time when you are unlikely to be disturbed and that you do not spend too long on any one question. Your first thoughts are usually your best. And even if you feel the items covered may not apply directly to your working life, please do not ignore them. All your answers are essential in building an accurate picture. You can access each section of the questionnaire through the skip links at the beginning of the questionnaire. Please type your answers by or after each question.

Please note that your name and address do not appear on the questionnaire and that there is no identification number. All the information that you give us will be totally confidential.

When you have completed the questionnaire please return it in the enclosed pre-paid envelope by Friday 9th February 2007 or e-mail to cpoyntz@focus-consultancy.co.uk

To enable us to ensure that our sample is diverse, we would be grateful if for monitoring purposes, you could complete Annex A and return it to us in the same envelope or to the same e-mail address.

We hope you enjoy completing the questionnaire and thank you in advance for taking the time to share with us your opinions. If you would like any further information about this project, please take a look at http://www.lsc.gov.uk/Aboutus/equality-diversity

Yours faithfully

Professor Chris Mullard, CBE MA PhD
Project Director

CONFIDENTIALITY:

Personal data will be treated in strict confidence. The information on this form will be used for the purposes of this feasibility study only, to ensure that we have a cross-representation of views. No individuals will be identifiable and no information about individuals will be shared with anyone except those conducting this feasibility study and the LSC.

Questionnaire For Equality & Diversity Practitioners
Please answer all of the questions below in as much detail as possible or using the sliding scale when indicated. Type your answers by or after each question. Please note that equality & diversity will hereafter be referred to as E & D.

Questionnaire begins

Part A: **Education and Qualifications**

Part B: **Market Size, Organisation & Specialist Areas**

Part C: **Competency Framework and Skills Set**

Part D: **Access to Training**

Part E: **Association**

Part F: **Additional Comments**

Part A: Education and Qualifications

A1 What academic qualifications do you hold?

A2 What vocational qualifications do you hold?

A3 Do you hold a professional qualification?
If yes, which?

A4 Do you belong to any professional bodies?
If yes, which?

A5 Do you have any additional training specific to equality and diversity?
If yes, please specify

Part B: Market Size, Organisation & Specialist Areas

B1 How many people do you know who work in the following?
- E & D in your organisation?
- E & D in the UK?

B2 Which of the following categories would you place yourself in?
- Trainer
- Consultant
- Researcher
- Adviser
- Project/Account Manager
- Other, please specify

B3 Which sector do you work in?
- Public
- Private

- Voluntary
- Charity
- Independent / consultancy
- Other, please specify

B4 Which of the following best describes your current role?
- External practitioner's role
- In-house practitioner's role
- A fully focused E & D role
- A partly focused E & D role

B5 Is your role:
- Internally focused on staff
- Externally focused on customers

B6 For how many years have you worked in any of the following areas:
- All E & D Strands
- Race
- Faith
- Disability
- Gender
- Sexual Orientation
- Age
- Human Rights

B7 Do you feel that you hold the appropriate training and / or qualifications to work in your field?

If no, what do you feel the most appropriate training / qualifications are? Please specify

Part C: Competency Framework and Skills Set

C1 In which educational sectors are you qualified?
- Arts
- Humanities
- Science
- Social Sciences
- Business / Management / Finance
- None, purely experience
- Other, please specify

C2 How important do you feel the following competencies and skills sets are?
Please use the sliding scale of importance as follows:
5 = Critically Important
4 = Fairly Important
3 = Neutral
2 = Fairly Unimportant
1 = Very Unimportant

- Social & Interactive Skills
- Managerial Competencies
- Critical & Evaluative Competencies
- Subject / Content Knowledge
- Writing & Report Writing Skills
- Discipline, timelines, deadlines, efficiency
- Context Knowledge, Political & Policies
- Objectivity, bias
- Analytical Skills
- Commercial Knowledge / Market / Organisational
- Other, please specify

Part D: Access to Training
Please feel free to tick one or more

D1 Where do you currently obtain your formal diversity-related training or knowledge?
- College / University Course
- Private / Independent Course
- In-house Course
- Other, please specify

D2 Where do you obtain your informal diversity training?
- Trade and other relevant literature
- Meetings / Conferences / Seminars
- Social Networks
- Other, please specify

D3 On what basis do you select your provider / source for your training / further development?
- Cost
- Location
- Accreditation
- Recommendation / Reputation
- Sponsoring body
- Other, please specify

D4 How often do you retrain and formally refresh your knowledge of E&D?
- Every year
- Every five years
- Every ten years
- Other, please specify

D5 What other methods of developmental learning do you use?

Part E: Association

E1 Is it a good idea to have an association for diversity practitioners?

E2 Do you think it will benefit you?

If yes, what association structure would you like to see?
- Open Network Association – open to all practitioners involved in one or more strands of E&D.
- Member Association - as the Open Network but membership defined by qualification and experience.
- Chartered Member Association – as the Open Network but membership defined by the Association's own accredited qualification and experience.
- Other, please provide detail

E3 Which of the following functions / services would you require from an association?
- Members' Forum
- Advisory, Legal & Research Services
- Members' Newsletter
- Regulatory / Accountability Body
- Members' Meetings / Conferences
- A Regional / Local set-up
- Ethical Guidance
- Members' Training / Developmental Courses
- Advocacy
- Other, please specify

E4 Which of the following are important in determining eligibility for membership in an E&D association?
Please use the sliding scale of importance as follows:
5 = Critically Important
4 = Fairly Important
3 = Neutral
2 = Fairly Unimportant
1 = Very Unimportant

- Length of time / experience working in the E & D field
- Qualifications & training
- Being from the target group that you specialise in
- Number of projects worked on
- An accreditation by a certified body
- Other, please specify

E5 Are you prepared to pay a membership fee?

Part F: Additional Comments
Please provide in a space below any additional comments or thoughts

End of questionnaire
Thank you for your time and comments.
Please send your completed questionnaire back to us either by e-mail to cpoyntz@focus-consultancy.co.uk by or by post in the pre-paid envelope by Friday 9th February 2007.

Appendix D: List of Key Interviewees

Lord Adebowale, CE, Turning Point

Saif Ahmad, CEO, Muslim Aid

Geoff Armstrong, Director-General, CIPD

Waqar Azmi, Diversity Advisor, Cabinet Office

Dame Jocelyn Barrow, Chair, Slavery Memorial Trust

Linda Bellos, Director, Diversity Solutions

Walter Brown, Principal, Liverpool Community College

Kay Carberry, TUC

Mariane Cavalli, CEO/Principal, Croydon College

Bill Gulam, Salford University

Lord Hastings, KPMG

Paul Head, Principal, College of North East London

Baroness Howells, Trustee, Stephen Lawrence Charitable Trust

Dilip Joshi, Equality & Diversity Adviser, Hindu Council UK

Professor Daniel Khan, Principal, Grimsby Institute of Higher & Further Education

Sir Bert Massie, Disability Rights Commission

Lord Ouseley, Chair, Institute on Aging & Ethnicity, University of Bradford

Baroness Prashar, Chair, Judicial Appointments Commission

Lynda Purser, Director, Institute of Management Consultancy

Barbara Roche, former Minister for Equality and Women

Nina Schuller, Age Concern

Ben Summerskill, CEO, Stonewall

Dr Neil Wooding, CEHR Commissioner

Dianah Worman, Diversity Advisor, CIPD

Appendix E: Case Studies - Accreditation & Training

Case Study 1

Centre for Ethnicity and Health

MA. Postgraduate Diploma, Postgraduate Certificate

Promoting Equality and Managing Diversity

This is currently the only UK course in this field that enables students to place their workplace practices in an academic context and which does so whilst addressing all social inequalities, rather than focusing upon one or two. It aims to develop students' understanding and critical awareness of a broad range of current problems and issues in the field of equality and diversity. It aims to develop the specific skills necessary for students to apply this understanding effectively to the promotion of equality and management of diversity in the public or voluntary sector workplace. For those wishing to carry out practice-based research, there is a module to support development of appropriate research methodology.

This programme purports to be of interest both to those currently working in the field, and those wishing to move into equality and diversity work.

Year 1

Understanding Discrimination, Equality and Diversity (C)

Managing Change (C)

Promoting Equality and Diversity (C)

Practice-Based Research (C)

Year 2 (if applicable)

Challenging Discrimination and Harassment in the Workplace (C)

Community Engagement (C)

Dissertation (C)

Case Study 2

Managing Diversity in the Workplace: A BTEC Qualification (Edexcel)

Managing Diversity is a modular programme of qualifications for the continuous and professional development of individuals working in the area of diversity management. Having successfully completed the course, students will receive an Award, Certificate or Diploma in Managing Diversity accredited by Edexcel.

This unique programme was developed in response to needs expressed by employers both within the private and public sectors across the UK. A central aim of the programme is to support diversity practitioners in improving their organisation and to set their role on a more professional footing.

Having adopted a modular framework, the programme of study is accessible through distance learning and in order to meet the full needs of learners the course is available online, offline or in a combination of the two learning methods. Assessment is by means of assignments and work-related projects. This gives participants the opportunity to develop a range of skills and competences immediately transferable to the workplace setting.

On successful completion of course-work learners qualify for the BTEC Professional Diploma, Certificate or Award. The programme is quality assured and accredited by Edexcel as a Centre-Devised set of qualifications at level 4 on the UK Qualifications Framework.

The programme has been continuously developed by Digitalife since 1998, and has subsequently received support from the former Bradford Training and Enterprise Council, Yorkshire Forward, West Yorkshire Learning and Skills Council and Bradford City Council under the ESF EQUAL initiative.

Description & Outcomes

Unit 1:   Background to Managing Diversity

Unit Value: 6

This unit provides an overview of what is meant by diversity and how managing diversity is both different from, and yet closely linked to, equal opportunities.

Summary of Outcomes

Successful completion of this unit requires that the learner:

1.   Explores the concept of 'managing diversity'.

2.   Explores the concept of 'equal opportunities'.

3.   Can provide a clear explanation of how equality of opportunity relates to managing diversity.

4.   Possesses an analytical appraisal of the key points of the learner's own diversity.

5.   Analyse how demographic and work pattern changes will impact on the learner's

organisation.

Case Study 3

The DMS Diploma in Diversity

The Chartered Institute of Personnel Development

This diploma is designed to address HR practitioner standards aligned to Equality and Diversity.

DMS are an accredited CIPD (Chartered Institute of Personnel Development) assessment centre and the Diploma has been designed to address all the CIPD practitioner standards aligned to Equality and Diversity. For those with the relevant experience, the Diploma can be assessed and accredited towards graduate membership of the CIPD and participants with 5 years management experience (3 of which are HR/People Management related) will be able to have this programme accredited by DMS as the Equality and Diversity Elective of the CIPD professional development scheme for Graduate Membership.

The course will be run over 4 months with participants attending 3 two-day workshops and completing 2 written assignments.

The course covers the following:

(a) Understanding the business advantages that come from managing diversity
(b) Arguing the case for diversity as a contributor to organisational success
(c) Benchmarking
(d) Importance of mainstreaming/Integration

Case Study 4

ACCREDITATION: FOUNDATION DIPLOMA IN IRELAND

Training developed by employers and academics

Equal designed a project where equality and diversity training was developed for a range of key professionals working in a number of Irish enterprises: public and private, manufacturing and services, rural and urban. Participants included HR personnel, strategic management, equality officers, health and safety experts and recruitment specialists. The training provided accreditation, new strategies, networking and a focus on the benefits of diversity in enhancing competitiveness and employability. The training allowed diversity and equality to be seen as an integral component of best practice in personnel management and corporate positioning.

The companies involved in the training represented a cross-section of Irish employers, both indigenous and trans national. Most were medium to large scale and straddled the manufacturing and services sectors. All had been involved in strategic change management processes as more Irish enterprises react to the challenges and opportunities of globalisation. Waterford Crystal, one of the largest private sector employers in Ireland, was a lead participant. Based in Ireland it also owns companies in the UK, Germany and USA. It has a particular focus on disability and gender balance in its personnel orientation. Competing in a global market Waterford Crystal views diversity as an example of best practice and quality. Other participating employers included Irish Rail, Dublin Bus, local government authorities, Kerry Foods, FAS and Eircom. The result was the development of a Diploma in Equality and Diversity in the Workplace with the National University of Ireland (Galway). This was structured in an open learning format to develop the skills, knowledge and attitudes of HR specialists and trainers. It combined academic knowledge with practical workshops, case studies and training interventions.

The diploma course has been designed to provide a solid foundation for the development of equality and diversity strategies among the participating employers. This experience was designed to be cascaded throughout each enterprise (on both sectoral and geographic levels) so that lessons and best practice can inform HR and training strategies. A strong network of State agencies and private employers was promoted. Course participants have now linked to form a network of trainers and HR specialists. Trans national collaboration with France and Finland complemented this process.

The Course was developed and delivered to six groups of 20 students (120 in total) over the lifetime of the project. The National University of Ireland, Galway, has now mainstreamed the Diploma course. The Course contains written materials, assignments, in-company projects and dedicated workshops on best practice. A network of accredited equality and diversity trainers has been developed. The managers of other Equal projects themselves participated in the Course ensuring optimum dissemination throughout the sector. The Course, in modified format, has also been delivered to the national police force in the Garda Training College.

The graduates of the course have formed a strong network of practice and training within a wide range of employers. Equality and diversity have been promoted not just as a task to develop acceptable policies but also to promote qualitative change in human relations within an employment context. Employers have been encouraged to

see diversity as a competitive advantage and a way to provide more dynamic, productive and innovative work environments.

Case Study 5

UNDERSTANDING DIVERSITY

Distance Learning Programme, Focus Consultancy Limited and Grimsby Institute of Further & Higher Education.

This is a Level 2 Learning Programme that is made up of three modules of learning – The Meaning of Diversity, Organisational Diversity and The Legal Case. It is aimed at individuals in a work environment. There are two assessments to be completed plus a number of workbooks, activities and assessment questions.

Learners will work through the learning materials – in booklet form, CD-Rom, on-line via the Internet or VLE – and will submit assessments via e-mail, post or through a virtual learning environment portal.

Learners will be allocated a tutor to support their learning and mark their assessments.

There is a similar four-module programme – Managing Diversity in Further Education – aimed at staff in the FE Sector.

Appendix F – Income & Expenditure Budgets

Year One

INCOME	Note	No	Rate	TOTAL	
Individual Membership Fees		1,500	50	75,000	
Corporate:					
Private Sector Bodies	1	100	550	55,000	
Public Sector Bodies	2	250	650	162,500	
Development Grants	3			<u>150,000</u>	
TOTAL INCOME					**442,500**

EXPENDITURE	Note		TOTAL
Staff Costs:			
Director			50,000
Development Officer			36,000
Event Organiser			32,000
Secretary			22,000
On costs			21,000
Travel & Subsistence			15,000
Office Costs:			
Rent			14,000
Service Charge			7,000
Rates			5,120
Heat & Light			2,800
Telecommunications	4		3,400
Insurance			1,450
Printing, Postage & Stationery			7,000
Repairs & Renewals			4,000
Other Costs:			
Audit & Accountancy			5,000

Legal Fees	5			4,000
Bank Charges				1,200
Marketing & Development Costs	6			150,000
Training Courses Costs	7			50,000
Capital Expenditure:				
Fixtures & Fittings	8			3,000
Equipment	9			<u>6,000</u>

TOTAL EXPENDITURE   **439,970**

EXCESS INCOME/EXPENDITURE   **2,530**

<u>**NOTES**</u>

1. Private Sector Bodies income is based on an Organisation Fee of £150 plus £100 per nominated representative and assumed an average of 4 representatives.

2. Public Sector Bodies income is based on an Organisation Fee of £150 plus £100 per nominated representative and assumed an average of 5 representatives.

3. Development Grants to be sought from EU, LSC/DFES type organisations, Charitable Trusts etc.

4. Telecommunications covers phones, email, internet, mobiles, fax etc.

5. Legal Fees covers Office leasing and associated costs.

6. Marketing and Development costs include members forum, advisory, legal and research services, members newsletter, meetings/conferences, regional set-up, ethical guidance, advertising etc.

7. Training costs include the development and design of courses, course materials, Trainers etc.

8. F and F covers desks, chairs, filing cabinets and general office fixtures.

9. Equipment covers, computers, printers, phones, copier, fax etc.

Year 2

INCOME	Note	No	Rate	TOTAL
Individual Membership Fees	1	2,000	50	100,000
Corporate:				

Private Sector Bodies	2	133	550	73,150
Public Sector Bodies	3	332	650	215,800
Development Grants	4			<u>100,000</u>

TOTAL INCOME   **488,950**

<u>EXPENDITURE</u>

Staff Costs:

Director	5	52,250
Development Officer		37,800
Event Organiser		33,600
Secretary		23,100
Administration Officer	6	12,000
On costs		23,813
Travel & Subsistence	7	15,750

Office Costs:

Rent		14,000
Service Charge	8	7,700
Rates		5,632
Heat & Light		2,940
Telecommunications		3,570
Insurance		1,522
Printing, Postage & Stationery		7,350
Repairs & Renewals		4,200

Other Costs:

Audit & Accountancy		5,250
Bank Charges		1,260
Marketing & Development Costs	9	172,500
Training Courses Costs	10	60,000

TOTAL EXPENDITURE   **484,237**

EXCESS   **4,714**
INCOME/EXPENDITURE

<u>NOTES</u>

1.Assumed Individual Membership increases by 33% due to increased recruitment of E&D

staff by Private and Public sectors.

2. As Note 1 a 33% increase in membership is assumed.

3. As Note 1 a 33% increase in membership is assumed.

4. Assumed reduced amount of Development Grants available for year two.

5. All staff salaries increased by 5% to cover pay rise.

6. Administration Officer recruited for second 6 months of year two to cover increased membership.

7. Travel and all other overhead costs increased by 5% for inflation.

8. Service Charge increased by 10% to allow for increased work on premises.

9. Marketing and Development costs increased by 15% to cover increased marketing and membership.

10. Training costs increased by 20% to cover increased membership.

Year 3

INCOME	Note	No	Rate	TOTAL
Individual Membership Fees	1	2,660	50	133,000
Corporate:				
Private Sector Bodies	2	176	550	96,800
Public Sector Bodies	3	442	650	287,300
Development Grants	4			50,000

TOTAL INCOME   **567,100**

EXPENDITURE				
Staff Costs:				
Director	5			54,860
Development Officer				39,690
Event Organiser				35,280
Secretary				24,255
Administration Officer				24,000
On costs				26,713
Travel & Subsistence	6			16,540
Office Costs:				
Rent				14,000
Service Charge	7			8,470

Rates		6,195
Heat & Light		3,090
Telecommunications		3,750
Insurance		1,600
Printing, Postage & Stationery		7,720
Repairs & Renewals		4,410
Other Costs:		
Audit & Accountancy		5,510
Bank Charges		1,320
Marketing & Development Costs	8	207,000
Training Courses Costs	9	78,000

TOTAL EXPENDITURE   **562,403**

EXCESS   **4,697**
INCOME/EXPENDITURE

NOTES

1. Assumes a further increase of Individual members of 33% due to continued recruitment of more E & D practitioners.

2. As Note 1 a 33% increase in membership is assumed.

3. As Note 1 a 33% increase in membership is assumed.

4. Assumed further reduction in Development Grants available for year three.

5. All staff salaries increased by 5% to cover pay rise.

6. Travel and other overheads increased by 5% for inflation.

7. Service Charge increased by 10% to allow for increased work on premises.

8. Marketing and Development costs increased by 20% to cover increased marketing and membership.

9. Training costs increased by 30% to cover increased membership.