

## **CII Local Institutes**

### **Equality and Inclusion Policy**

#### **Introduction**

The CII's local institute network provides membership and services to a diverse profession.

It seeks to:

- Promote ethical business and professional practices among persons engaged or employed in insurance or financial services;
- Create an inclusive local institute which represents the background of its members.

The CII's local institute network values and respects diversity and strives in all of its activities to take account of and reflect the interests of all the people it serves in line with section 5 of the Chartered Insurance Institute (CII) Code of Ethics with which all members must comply.

#### **1. Commitment**

The CII's local institute network strives to:

- 1.1** Eliminate unjustifiable discrimination on any grounds including age, disability, gender identity, marriage and civil partnership, pregnancy and maternity, race, religion and belief, sex, sexual orientation or any other status.
- 1.2** Promote equal treatment and diversity for all existing and potential stakeholders including Members, examination candidates, learners, Council and committee members and contractors in all its practices and arrangements
- 1.3** Encourage a wider diversity of people to work in insurance and financial services and to become members of the CII and PFS

#### **2. Strategic Objectives**

In order to make progress towards fulfilling its commitments, the CII's local institute network:

- 2.1** Strives to carry out its responsibilities fairly and consistently – in compliance with equalities and anti-discrimination legislation and the equality and diversity policy by:
  - Ensuring that its policies, processes, systems and procedures do not discriminate unjustifiably and consider how equality of opportunity for all stakeholders can be ensured.
  - Making changes to policies, processes, systems and procedures where inequalities or discriminatory practices are identified
  - Making reasonable adjustments and changes to access requirements where possible and practicable
  - Ensuring equality of opportunity for all stakeholders

- 2.2. Works towards a more inclusive profession which can provide sensitive, appropriate and high-quality professional services to diverse clients
- 2.3. Seeks to encourage a diverse profession by considering and promoting the interests, views, needs and aspirations (commensurate with the CIIs local institute network equality and diversity commitment) of all sections of the profession by:
  - Understanding the needs and issues of the different groups within the profession and identifying and mitigating against any barrier to exam entry and qualification and any other product or service provided by the CIIs local institute network;
  - Challenging views and policies which either fail to take account of or are silent on the impact on different groups in the profession, users of financial services
- 2.4. Develops a governance structure and organisational capacity to deliver its equality and diversity commitment by:
  - Working towards ensuring that the Council and committees in all their activities reflect and represent the diversity in the profession their members and other stakeholders;
  - Ensuring that resources are adequate and used effectively to support equality and diversity activities;
  - Providing those involved in the governance and management of the CIIs local institute network with the knowledge and the confidence to deal with equality and diversity issues in an inclusive and robust manner.
- 2.5. Works towards adopting good practice on equality and diversity issues by:
  - Actively promoting equality and diversity with its Members and stakeholders;
  - Regularly reviewing and assessing progress toward achieving its equality and diversity goals.

### **3. Implementation**

#### **3.1 Responsibility**

Everyone is entitled to be treated equally and without unjustifiable discrimination. They also have responsibilities to act without unjustifiable discrimination to others.

- 3.1.1 Responsibility for ensuring that progress is made on equality and diversity issues has been delegated to the Council and is a regular item of report at its meetings.
- 3.1.2 Other committees have a responsibility to ensure that equality and diversity issues are considered fully in respect of their responsibilities and spheres of activity.
- 3.1.3 Each Council and committee member have responsibility for complying with and promoting the CIIs local institute network equality and diversity policy and for ensuring they have read and understood the policy.

## **3.2 Communication**

The CII's local institute network will communicate its equality and diversity policy and activities to its Members using a variety of methods and formats.

### **The Legislation – Additional Notes**

#### **Isle of Man and the Channel Islands**

Although the Equality Act 2010 is not enforceable in the Isle of Man and the Channel Islands, the principles set out in the E&D Policy apply to all jurisdictions and will help to prevent discrimination by any LI based in these locations.

In the Isle of Man, an Equality Bill is being drafted which will cover discrimination against race; religion; sexual orientation; age; disability; and gender reassignment. Many of these characteristics are already covered by single discrimination acts.

The States of Jersey have passed legislation making it illegal to discriminate on the grounds of race and are currently reviewing the introduction of discrimination legislation regarding gender, age and disability. The States of Guernsey already have some discrimination legislation in place.

#### **Northern Ireland**

The Equality Act includes two protected characteristics which are only relevant in Northern Ireland. These protected characteristics are political opinion and people with dependents.