

British Accounting and Finance Association (BAFA)
Equality, Diversity and Inclusion (EDI) Policy, Implementation, and Guidance
(Updated Version, March 2025)

1. Policy Statement

BAFA is committed to equality, values diversity very highly, and promotes an open, inclusive culture. We believe that diversity enriches our organisation, and contributes directly to the wider achievement of our objectives. We are committed to being an Association in which all members and visitors can interact and work free from discrimination and harassment.

We share the equality vision of the Charity Commission: to act inclusively, upholding equality law, treating everyone fairly and seeking to provide a culture which delivers the best outcomes for the diverse society in which and for whom we work.

The BAFA Executive Committee and Board of Trustees are responsible for ensuring that the Association acts in accordance with these principles and that its policies and practices comply with the Equality Act 2010.

BAFA will monitor key diversity and inclusion statistics as regards: membership; leadership and management of the Association and its sub-groups; nominations for and conferment of BAFA awards/accolades; nominations for external awards and accolades; and nominations to represent BAFA to/on external bodies, commissions, etc. All nominations/applications as regards leadership, awards, representation, etc. will be assessed on their merits after careful consideration. We will seek to encourage applications from under-represented groups as opportunities arise.

2. Policy implementation

BAFA established a Working Party on Equality, Diversity and Inclusion, and following its report in January 2018, a number of recommendations were made and endorsed by the BAFA Executive Committee and the Board of Trustees. Those recommendations were then articulated in terms of a plan of action linking objectives, actions and responsibilities. EDI Monitoring and Advisory (EDIMA) Group and applicable policies have been formally established and operating from 1st October 2018.

Overall, the objective is to embed the relevant governance, accountability and procedural mechanisms with a view to adhering to the vision and expectations set out in the policy statement.

Mechanism	Policy	How & when	Who/responsibility
Governance	The Equality, Diversity and Inclusion Monitoring and Advisory (EDIMA) Group, chaired by an independent chairperson, monitors, and recommends to the Executive Committee and Board of Trustees, on all aspects in relation to EDI in BAFA.	<p>The EDIMA Group comprises no more than eight members and at least five members (including the chairperson) at any point in time. The BAFA Vice President is an ex-officio member of the Group.</p> <p>The EDIMA Group derives its authority from the Board of Trustees of BAFA.</p> <p>The EDIMA Group meets regularly to review and discuss the policies, implementations, performance, and all other aspects in relation to EDI in BAFA. The Group provides recommendations or advice for the Executive Committee and Board of Trustees.</p>	<p>Board of Trustees</p> <p>BAFA Executive Committee</p> <p>EDIMA Group</p>
Procedural	Collect membership data in terms of the protected characteristics of gender, age, ethnicity, and disability on a regular basis.	Online membership portal when joining or renewing membership. There will be explicit 'opt out' provisions.	<p>EDIMA Group</p> <p>BAFA General Secretary</p>
Procedural	Monitor and analyse the composition of the Board of Trustees, the SIG and Area Group Executive Committees, the CDAF and CPAF Executive Committees and any committee which makes awards or nominations (e.g., for prizes or the REF).	Review the annual returns by sub-groups and the composition of committees.	<p>EDIMA Group</p> <p>BAFA General Secretary</p>
Procedural	The EDIMA Group should, usually via its Chair, be directly involved as regards composition (including nominations /	Chair of Board of Trustees and Chair of awards/nominations committees to liaise with EDIMA	<p>Chair, Board of Trustees</p> <p>Chair, Award/Nomination Committees</p>

	appointments to those groups), for the BAFA Board of Trustees, BAFA Executive Committee (non <i>ex officio</i> roles) and awards/nominations committees.	Chair.	Chair, EDIMA Group
Procedural	Advertise roles for executive/leadership groups of BAFA sub-groups to be advertised.	All sub-groups to implement the enclosed guidance on appointments.	Executive/leadership teams of all sub-groups.
Accountability and reporting	Report to Executive Committee and Board of Trustees.	EDIM becomes a standing item on the agenda of the Executive Committee and Board of Trustees.	Chair, BAFA Executive Committee Chair, Board of Trustees Chair, EDIMA Group
Accountability and Reporting	Report to Executive Committee, Board of Trustees, and Annual Meeting.	Annual report on membership, composition, and appointments in relation to EDI, inclusive of relevant statistics. Summary of action points and achievements.	Chair, EDIMA Group EDIMA Group BAFA General Secretary
Procedural	To remove or minimise disadvantages suffered by people because of their protected characteristics.	Ensure that conferences, meetings and events have appropriate facilities. Consider the case of members with disabilities, pregnancy or maternity, or caring responsibilities (e.g., day delegate option, virtual attendance) Consider the timing of religious festivals when scheduling events.	Executive/leadership teams of all sub-groups Conference, meeting and event convenors
Procedural	Offer training on diversity, equality and unconscious bias to all BAFA Executive and leadership teams of all sub-groups	To consider the availability of training on a face-to-face or online basis for EDIMA Group.	EDIMA Group

	EDIMA Group members to be trained accordingly.	Where applicable, to consider that many members would have followed similar training programmes in their home institutions.	
Procedural	Establish a suggestions and complaints process for BAFA members.	Set out a process for suggestions and complaints on the BAFA Website.	Chair, EDIMA and a nominated member of the Board of Trustees

3. Guidance on BAFA appointments

3.1 Any roles (including BAFA Board of Trustees, BAFA Executive Committee, Editorships of BAR, Convenor of the Doctoral Conference, SIG or Area Group Executive Committees, Awards Nominations Committees, Invitations for Nominations for Awards/Recognition/Representation) becoming available for all of the above committees should be advertised for a period of at least one month to the wider membership via the newsletter (or equivalent communication) and website, with any under-represented groups particularly encouraged to apply.

3.2. The application may take the form of a simple expression of interest with the Chair of the relevant Committee or Group.

3.3. Applications should then be considered by the relevant Committee or Group based on the skills and experience of the applicant(s).

3.3.1. For the BAFA Board of Trustees, BAFA Executive Committee (non *ex officio* roles) and any BAFA Awards/Nominations Committees, the Committee should include a member of the Equality and Diversity Monitoring and Advisory Group in the process for selecting the candidate. This will usually be the Vice President (VP) of BAFA, but in the event that the VP is unable to act in that capacity or when there is no VP, the President of BAFA shall nominate another member of the Group to take responsibility on a case-by-case basis.

3.3.2. If no suitable applicants for the advertised role come forward, the Committee or Group is free to approach other individuals and to encourage them to apply.

3.3.3. For any other BAFA Committee or Group, upon completion of the selection process, the Committee or Group should document and prepare a brief report for the Chair of the EDIMA Group within a month on the approach that it undertook and the manner in which equality, diversity and inclusion was taken into account.

3.3.4. In making appointments, each Committee or Group should take into account the equality and diversity characteristics of the wider membership of BAFA.