



2025 - 2028

Contents

Introduction.....	3
Development of the Scheme	5
Governance of the Scheme	5
The Authority’s vision in relation to Diversity, Equality and Inclusion.....	6
Progress made in the last three years.....	9
What we plan to do over the next three years.....	12
How we will measure our progress.....	15
Having your say and raising issues	17
Document Control Details.....	20

Introduction

Our Diversity, Equality and Inclusion (DEI) Scheme forms part of South Yorkshire Pensions Authority's corporate planning framework, which is updated every three years in line with the triennial cycle of our funding valuations and investment strategy reviews. This Scheme updates and replaces the EDI Scheme 2022 to 2025, reflecting on the progress made against our objectives since then and setting out our ambitions for the next three years to 2028 in relation to how we'll continue our development towards making the organisation inclusive and ensuring that equality and diversity remain central to how we deliver better, more customer focussed services to the people we serve.

The Authority's policy position in relation to Diversity, Equality and Inclusion is set out in this Scheme.

The Authority is not identified as within the scope of the Public Sector Equality Duty ("the duty") within the Equality Act 2010. However, as a public body, the Authority acts as though the Equality Duty fully applies to it.

The duty requires public authorities, in the exercise of their functions, to have due regard to the need to:

- ◆ eliminate unlawful discrimination, harassment, victimisation and any other unlawful conduct prohibited by the act
- ◆ advance equality of opportunity between people who share and people who do not share a relevant protected characteristic
- ◆ foster good relations between people who share and people who do not share a relevant protected characteristic

The relevant protected characteristics are:

- age
- disability
- gender reassignment
- pregnancy and maternity
- race
- religion or belief
- sex
- sexual orientation

The Authority is committed to compliance with the duty and to have due regard to the three aims set out above when making decisions.

The guidance for public authorities explains that having due regard for advancing equality involves:

- Removing or minimising disadvantages suffered by people due to their relevant protected characteristics.

- Taking steps to meet the needs of people who share a relevant protected characteristic.
- Encouraging participation in public life or any other activity by under-represented groups.
- Taking steps to meet the different needs of disabled persons.

The guidance outlines that fostering good relations means having regard to the need to deal with prejudice and support understanding.

These equality duty aims and activities have informed the development of our objectives and associated action plans set out in this scheme.

The Authority is committed to:

- ◆ Promoting equality of opportunity.
- ◆ Eliminating discrimination.
- ◆ Integrating equal opportunities into all aspects of the Pensions Authority's activities.
- ◆ Ensuring that equality operates in the Authority's employment practices.
- ◆ Ensuring that equality operates in the Authority's provision of services.

All these commitments are reflected in the objectives and actions set out in this scheme.

Fundamentally, the Authority believes that no one who comes into contact with it, for whatever reason, should have cause to feel that they have received less than an appropriate and professional service. Consequently, we will ensure that our systems and processes, and attitudes and behaviours do not result in discrimination against any individual or group of individuals.

This DEI Scheme is focussed around the Authority as a service provider to our customers (scheme members and scheme employers), the Authority as an employer, and as an elected body and decision maker in our governance arrangements. The scheme does not cover the Authority's investment activities which are instead dealt with through the separate Responsible Investment Policy which addresses issues of equality and diversity in the context of the Authority's broader approach to addressing Environmental, Social and Governance risks in relation to assets in which the Authority is invested.

Development of the Scheme

This scheme has been developed to support the process of refreshing the Corporate Strategy.

The process has involved the development of a number of objectives which align with the Authority's corporate strategy, the refresh of which has taken into account both information around changes in the membership of the Pension Fund and key data on the composition of the Authority's workforce and has involved engagement with a wider range of stakeholders.

As a result of aligning the two processes it has been possible to reflect the views of stakeholders in both this scheme and the corporate strategy.

It is accepted that there are limitations to this approach and consequently one of the actions identified in this scheme is the need to develop means of actively engaging with both scheme members and groups in the wider community to ensure that the services we deliver and the way in which we operate do not discriminate in any way.

Governance of the Scheme

As this scheme is a major policy document, responsibility for approving it lies with the full Authority. It is aligned with and considered for approval as a key part of the triennial review of the overall corporate planning framework.

Overall responsibility for the delivery of the scheme has been allocated to the Assistant Director – Investment Strategy as the Senior Management Champion for Diversity, Equality & Inclusion. They will be supported by workstream leads for Customer Services and Human Resources who will draw together relevant small teams of staff to deliver pieces of work.

Given that the Scheme commits the Authority to a range of actions it is important that progress on these actions is reported on a regular basis. Regular reports will be provided to the Senior Management Team and the Authority on the implementation of the Corporate Strategy, and these will include progress on the issues identified in this Scheme. Progress will also be included in the Annual Report which is addressed to a much wider group of stakeholders.

The Authority's vision in relation to Diversity, Equality and Inclusion

The Authority has developed the following statement which summarises the vision and overall aims in relation to diversity, equality and inclusion.

South Yorkshire Pensions Authority aims to reflect the diverse communities we serve in all areas of our work and will strive to achieve a workforce that reflects this diversity. In delivering our services and managing our organisation, we aim to ensure every person is treated fairly and equitably, within an inclusive environment and a sense of belonging as central to our overall mission.

These aims are at the heart of supporting all of the Authority's corporate objectives, although this DEI Scheme supports the following ones in particular.

To uphold effective governance, showing prudence and propriety at all times:

Effective and Transparent Governance

To design our services around the needs of our customers (whether scheme members or employers):

Customer Focus

To ensure that stakeholders' views are heard within our decision making processes:

Listening to Stakeholders

To ensure that all our employees are able to develop a career with SYPA and are actively engaged in improving our services:

Valuing Employees

The current make-up of our workforce (based on employee data at 31 March 2024) and how this compares to the population of Barnsley, where we are located, and South Yorkshire, the area we serve, is shown below.

Characteristic	SYPA %	Barnsley* %	South Yorkshire* %
Gender			
Female	66%	51%	51%
Male	34%	49%	49%
Ethnicity			
Non-white	2.6%	3.1%	12.3%
White	97.4%	96.9%	87.7%
Disability			
Disability	14.7%	22.0%	20.5%
No Disability	85.3%	78.0%	79.5%
Age			
0-19	0.9%	22.2%	24.3%
20-29	17.5%	12.1%	14.4%
30-39	26.3%	11.9%	12.3%
40-49	26.3%	15.6%	14.6%
50-59	25.4%	13.2%	12.1%
60-69	3.5%	11.7%	10.7%
70+	0.0%	11.9%	11.7%

* Data taken from the Office of National Statistics' 2021 Census data:
[2021 Census Profile for areas in England and Wales - Nomis \(nomisweb.co.uk\)](https://www.nomisweb.co.uk/census/2021)

Progress made in the last three years

Achievements against the aims of the 2022 – 2025 Strategy

To make our services more accessible to disabled customers.

We currently offer a range of accessibility options – large print, Braille, audio CDs, BSL interpreters, as well as the usual letter format, email, live chat (web chat), and social media channels.

We now offer video appointments, text messages, face to face appointments, group presentations in person and online, website and telephone appointments.

An assessment of our Oakwell House office for accessibility adjustments was implemented in 2022 and this is regularly reviewed.

Through our engagement activity with scheme members and employers to promote equality and inclusion, and to help bring people from different backgrounds together

We have undertaken data gathering processes with larger employers in 2022 and 2023.

We targeted female members in the latest 2024 Pension Planning Newsletter with an article on the Gender Pensions Gap and how to increase benefits.

An article on Sharia Law & The LGPS was included in our November 2024 Active & Deferred newsletter.

We targeted members who have opted out with an article on re-joining the scheme in our Deferred Newsletter 2024.

We run 3 separate Focus Groups, made up of active, deferred and pensioner members.

Our Focus Groups help us understand what our members want and how we can sustainably match their needs, ensuring our services are accessible to all. Members participating in a focus group and communicating their thoughts with us are helping us by providing a valuable insight to ensure we get things right.

We ran a recruitment campaign for additional Focus Group members in October 2023.

To ensure decision-making in the Authority is informed by a robust and clear impact assessment of how people with protected characteristics will be affected, taking action to reduce any inequalities where appropriate

The planned objective to produce and implement a policy and procedure for Equality Impact Assessments was not achieved in the target timescale. However, each report to the Authority, its Committees or to the Local Pension Board, includes a requirement to consider if an EIA is relevant for the decision and to provide one where this is the case.

During the period 2022 – 2025, EIAs were undertaken whenever relevant for decision-making – for example for the Pay and Benefits review outcomes, relevant HR policies and procurement decisions.

To ensure the workforce's diversity reflects that of the customers we serve.

We have expanded the variety of recruitment methods used to reach a wide audience for job advertisements.

We conducted an employee DEI survey, with new questions concerning caring responsibilities, in January 2024.

Our updated online Induction process captures employee equality information at point of entry.

To ensure the workforce culture, environment, policies and practices are safe, accessible, and inclusive for people with protected characteristics.

The staff survey conducted in 2023 showed an increase in overall employee engagement and we added a specific question to measure the extent to which employees feel able to express their authentic selves at work, which scored positively at 3.82 out of 5. We aim to achieve an increase in this score when the survey is run again in 2025.

We introduced a Senior Management Team Question Time event where staff can raise any questions or concerns directly. This is held twice a year. Actions arising from this and other engagement routes are now a standard item in the Senior Management Team workplan.

Mandatory training in Diversity, Equality & Inclusion was refreshed and updated as part of our Corporate Training plan for 2024/25

Diversity, Equality & Inclusion awareness is now part of our online induction process.

Monthly Trade Union Liaison meetings continue to be held where concerns can be raised and addressed.

Our Dignity at Work policy has been reviewed and related processes put in place.

Where statistically possible, to identify and reduce any pay gaps that exist associated with gender, disability or ethnicity.

A Pay and Benefits review was undertaken in 2023, with a range of enhancements implemented fully with effect from 1 April 2024. This included a fully revised grading structure, a reduction in standard weekly working hours from 37 to 35, and improved family leave policies, providing 26 weeks' maternity / adoption leave on full pay, and 6 weeks' paternity leave on full pay.

We invested in a 3-month group coaching programme for 10 female employees during 2023/24 to support them in learning more about the importance of visibility and self-promotion for women's career progression and help them identify their own unique ways to raise their profile to achieve their goals. The programme resulted in a range of successful outcomes, including two internal promotions.

Our gender pay gap is measured and reported annually in our annual report and accounts. This has reduced over the period of the last strategy. The median gap reduced from 17.1% at March 2022 to 16.6% at March 2024, and the mean gap reduced from 19.4% at March 2022 to 13.5% at March 2024.

What we plan to do over the next three years

Ref	Strategic Action	Timescale	Responsible Owner
<i>1. Make our services more accessible to disabled customers</i>			
DE1-A	Continue to develop communications channels where necessary to enable customers to contact us in ways that are accessible to them.	Ongoing throughout 2025-2028	Service Manager – Customer Services
DE1-B	Publicise the opportunity to receive information in accessible formats for customers.	Ongoing throughout 2025-2028	Service Manager – Customer Services
DE1-C	Accessibility audit of website to be undertaken.	March 2026	Service Manager – Customer Services
DE1-D	Ensure public areas of our office at Oakwell House are accessible to disabled customers.	Ongoing throughout 2025-2028	Operations Management Officer
DE1-E	Ensure when we use other venues for events that these are fully accessible.	As required.	Operations Management Officer
DE1-F	Ensure disabled customers are fully aware of our disability access initiatives and how to request or participate in these if needed.	March 2028	Service Manager – Customer Services
<i>2. Through engagement with scheme members and employers, promote equality and inclusion, and help bring people from different backgrounds together</i>			
DE2-A	Identify whether any group with protected characteristics is underrepresented in the membership of the Pension Fund when compared to their representation within the employer’s workforce.	April 2026	Assistant Director – Pensions
DE2-B	Identify potential causes of any underrepresentation and design and implement a communications strategy to address it.	September 2026	Assistant Director – Pensions supported by Communications Officer

Ref	Strategic Action	Timescale	Responsible Owner
DE2-C	Establish an internal group to ensure all accessibility issues are considered and improved or changes implemented on a regular basis. To include representatives from Customer Services, Communications, ICT and Operations. Meetings to be held every 6 months.	September 2025	Assistant Director – Pensions and Service Manager – Customer Services
<i>3. Ensure decision-making in the Authority is informed by a robust and clear impact assessment of how people with protected characteristics will be affected, taking action to reduce any inequalities where appropriate.</i>			
DE3-A	Develop an Equality Impact Assessment process for all new or revised policies or services. This should enable robust, timely and proportionate EIAs to be developed and reported to decision-makers.	December 2025	Head of Governance & Corporate Services
DE3-B	Provide appropriate employees with the necessary training and support to undertake the EIA process.	March 2026	Head of Governance & Corporate Services
DE3-C	Provide elected members with appropriate training and awareness in all matters pertaining to diversity, equality and inclusion to ensure robust decision making.	June 2026	Head of Governance & Corporate Services
<i>4. Ensure the diversity of our workforce reflects that of the customers we serve.</i>			
DE4-A	Continue to monitor and report on workforce diversity, including annual reporting & identify areas of under-representation and develop plans to address these. (Part of the People Strategy).	March 2027	Assistant Director – Resources and HR Business Partner
DE4-B	Provide Recruitment and Selection, including Unconscious Bias, training to all recruiting managers.	June 2025	HR Business Partner

Ref	Strategic Action	Timescale	Responsible Owner
DE4-C	Include above training in induction process for all newly appointed managers.	December 2025	HR Business Partner
5. Ensure the workforce culture, environment, policies, and practices are safe, accessible, and inclusive for people with protected characteristics.			
DE5-A	Consult with employees to better understand their experience of working for the Authority.	March 2026	Assistant Director – Resources and HR Business Partner
DE5-B	Establish a Working Group which reflects the workforce to champion DEI issues within SYPA.	December 2025	Assistant Director – Investment Strategy
DE5-C	Ensure all employees are fully aware of expectations with regards equality and diversity and how to report any concerns, through induction and training programmes and that these issues are reflected in the appraisal process.	Ongoing throughout 2025-2028	Assistant Director – Resources and HR Business Partner
6. Identify and reduce, where statistically possible, any pay gaps that exist associated with gender, disability or ethnicity.			
DE6-A	Monitor and report on the gender pay gap annually.	Annually in 2025 - 2028	Assistant Director – Resources
DE6-B	Explore the possibility of introducing statistical measures in relation to disability and ethnicity in the context of our small size.	March 2027	Assistant Director – Resources and HR Business Partner
DE6-C	Deliver group coaching programme for female employees once every two years.	June 2026	Assistant Director – Resources and HR Business Partner

How we will measure our progress

The following section sets out the different measures and sources of evidence that will be used to monitor and report back on progress against the objectives and actions planned.

1. Make our services more accessible to disabled customers

Success in this area will be measured and evidenced through:

- ◆ The number of communication channels available to disabled customers.
- ◆ The number of disabled customers who have opted to use each communication channel or have received / downloaded information in accessible formats.
- ◆ The level of accessibility of our office building.
- ◆ The number of reports/complaints concerning accessibility for our disabled customers.
- ◆ Data from customer research: Testing our services with customers with disabilities and provide easy ways for them to tell us about any barriers they face.

2. Through engagement with scheme members and employers, promote equality and inclusion, and help bring people from different backgrounds together

The overall success of this objective will be measured through data on the balance of scheme membership in the Fund being compared to the balance of employers' workforce.

3. Ensure decision-making in the Authority is informed by a robust and clear impact assessment of how people with protected characteristics will be affected, taking action to reduce any inequalities where appropriate.

Success in this area will be measured and evidenced through:

- ◆ Equality Impact Assessment (EIA) policy and procedure in place and up to date.
- ◆ Staff awareness and training sessions on conducting EIAs delivered.

- ◆ DEI coverage included in the Member Learning and Development Strategy and training programme.

4. Ensure the diversity of our workforce reflects that of the customers we serve.

Measures that will be relevant for monitoring progress on this objective include:

- ◆ Percentage of employees who have protected characteristics.
- ◆ Number of job applications received from underrepresented groups.
- ◆ Number of candidates appointed from underrepresented groups.

5. Ensure the workforce culture, environment, policies, and practices are safe, accessible, and inclusive for people with protected characteristics.

Indicators for this objective will include:

- ◆ Percentage of employees who have received induction and training in diversity and equality issues.
- ◆ Number of reports / complaints raised concerning equality and diversity issues through internal channels or under HR formal policies including Dignity at Work and Grievances.
- ◆ Results of biennial staff surveys in relation to the working environment and the specific measure on the question – ‘I feel comfortable expressing my authentic self at work’.
- ◆ Qualitative feedback through the staff survey and other communication channels for employees.

6. Identify and reduce, where statistically possible, any pay gaps that exist associated with gender, disability or ethnicity.

Progress on this objective will be measured through results for the pay gaps themselves but bearing in mind that the size of our workforce makes drawing meaningful and statistically sound conclusions difficult, this will be supplemented by qualitative analysis of feedback received through formal staff surveys, evaluation surveys following training and development events / programmes, and from leaver exit questionnaire and interview data.

Having your say and raising issues

Improving the way in which we as an organisation engage with and seek to understand people with protected characteristics is a key objective of this scheme. In the meantime, we are happy to receive any feedback about this Diversity, Equality and Inclusion Scheme whether from pension scheme members, employers, or members of the wider community.

Any feedback can be sent to:

Director
South Yorkshire Pensions Authority
Oakwell House
2 Beevor Court
Pontefract Road
Barnsley
S71 1HG

E-mail: FundDirector@sypa.org.uk

Anyone who feels we have not lived up to the aspirations within this Scheme in terms of treating them fairly has a right to make a complaint. This can be formally addressed by:

Informing the Chair of the Pensions Authority

The Chair
South Yorkshire Pensions Authority
Oakwell House
2 Beevor Court
Pontefract Road
Barnsley
S71 1HG

E-mail: GovernanceTeam@sypa.org.uk

Web: <https://www.sypensions.org.uk/Contact/Complaints>

Informing the Equality and Human Rights Commission

Phone: 0161 829 8100

Email: correspondence@equalityhumanrights.com

Post:

Correspondence Unit
Equality and Human Rights Commission
Arndale House
The Arndale Centre
Manchester M4 3AQ

Web: [Homepage](#) | [EHRC](#)

Right of Appeal

We administer the scheme in accordance with the Local Government Pension Scheme Regulations and other legislation and guidance issued by Government Departments.

If you disagree with any decision made by us, and wish to dispute it, then you must do so within 6 months of the date you were notified of that decision. To help you there is a formal Scheme Internal Dispute Resolution Procedure (IDRP) that you can follow. More information can be found on our website here <https://www.sypensions.org.uk/Contact/Complaints>

However, in the first instance you should contact our customer services team. They may be able to help you by explaining how your case has been dealt with and perhaps resolve any misunderstanding, query, or concern that you may have at that point.

Email: CustomerServices@sypa.org.uk

Telephone: 0300 303 6160

South Yorkshire Pensions Authority

Oakwell House

2 Beever Court

Pontefract Road

Barnsley

S71 1HG

Getting Outside Help

MoneyHelper - is a free service provided by the Money and Pensions Service to offer free and impartial money and pensions guidance. The Money and Pensions Service is an arm's-length body of HM Government, sponsored by the Department for Work and Pensions. It has a joint commitment to ensure that people throughout the UK have free access to the information and guidance they need to make effective financial decisions over their lifetime.

You can access this service at the MoneyHelper website: [Free and impartial help with money, backed by the government | MoneyHelper](#)

The Pensions Ombudsman - is an independent organisation set up by law to investigate complaints or disputes about pension schemes. The Ombudsman can investigate any type of dispute about your pension, but you must first have been through Stages 1 and 2 of the dispute rules. You can, however, complain to the Ombudsman about the way any of the adjudicators have handled your case and do not have to wait until your case has been completed.

You can find out more at: [About us | The Pensions Ombudsman](#) and you can contact them by calling **0800 917 4487** or by email to: enquiries@pensions-ombudsman.org.uk

More information on where to go for independent and impartial advice can be found on our website here: <https://www.sypensions.org.uk/Contact/Complaints/idrp>

Document Control Details

Publication	Diversity, Equality and Inclusion Scheme
Period covered	01 April 2025 to 31 March 2028
Owner	Assistant Director – Investment Strategy
Approved Date	<i>February 2025 - TBC</i>
Approved By	Full Authority
Next Review Date	February 2028

South Yorkshire Pensions Authority
Oakwell House
2 Beevor Court
Pontefract Road
Barnsley
S71 1HG

Tel: 0300 303 6160

www.sypensions.org.uk