Step-by-step guide to the 2023 EDI data tool

**September 2023**

The 2023 EDI data tool retains a similar structure and look to the previous version. However, we have made some improvements to the functionality. These include automatic calculation of staff figures in the Executive and Board tabs and a space on each tab to allow people to add notes.

For the majority of questions within the updated tool, we have used Census 2021 data to tell us the characteristics of the population by stock location. The census provides a picture of all people and households in England and Wales and using this data ensures the tool is as accurate and up-to-date as possible. We have adapted the wording of some questions to be in line with the latest census results and to ensure we’re asking them in a way which generates the best answers from respondents.

There are five tabs to complete. This document provides step-by-step guidance to completing each of those tabs and explanations to support interpretation of the tool.

Our 2023 data collection has now closed but we encourage housing assosciations to regularly review and update their data tool to measure progress over time.

For further information about the tool and how to use it please refer to the FAQs on the website: [National Housing Federation - EDI data tool](https://www.housing.org.uk/our-work/diversity-and-equality/EDI-tool/).

Stock

Stock data is used to calculate the characteristics of the communities your organisation serves on the next tab ‘Workforce by characteristic’ in the columns labelled ‘Population by stock location’, as well as in the ‘data’ tabs at the end of the workbook.

**To complete the stock tab:**

* Select your organisation from the drop-down list at the top of the Stock tab, this will populate columns B and C with stock data from the Social Housing Regulator’s Statistical Data Return.
* If this data is wrong, please select ‘No’ in cell C4 and input the accurate number of homes within each local authority in column G.[[1]](#footnote-1) The percentages in column H should calculate automatically.

Workforce by characteristic

Compare the characteristics of your workforce (all staff, including executives) with the characteristics of the population where your stock is located.

**To complete the workforce tab:**

* Populate the highlighted cells with the number of your workforce who have each characteristic.
* Once you have populated those figures, the workforce percentages and workforce to population comparison should calculate automatically.
* Your totals for each question should also calculate automatically. These should all match as this should be the total number of people within your workforce. If they do not match, the total will read ‘Error’.
* If you do not have the data for all employees, please record those employees as ‘don’t know’. If you do not have data on a particular characteristic for any of your workforce, please use the ‘don’t know’ responses to tell us this - i.e. input your total workforce number as ‘don’t know’. This helps us to understand gaps in the data, rather than where questions within the tool may have been accidentally missed.

**Column descriptions:**

* **Population by stock location:** calculates the proportion of the population (where your stock is located) that has that specific characteristic. This is calculated using the stock figures from the ‘Stock’ tab and population data, primarily from Census 2021 (see the Notes tab of the tool for more information).
* **Workforce to population:** calculates the percentage point difference between the proportion of your workforce that has that characteristic and the proportion of the population.
* **Workforce to population (excl. prefer not to say and don't know):** calculates the same as above, but removes ‘Prefer not to say’ and ‘Don’t know’ data from this calculation to provide a more helpful comparison of the characteristics. This is particularly useful if we do not have a ‘don’t know’ category for the population data or if there is a large difference between the number of ‘don’t know’ responses in your workforce data compared to the population data.

**Interpreting Workforce to population figures:**

* A negative number indicates that fewer members of your workforce have that characteristic compared to the population. And, vice versa, a positive number indicates that there are proportionally more people with that characteristic in your workforce compared to the population.
* The further away the number is from 0, the bigger the difference and, therefore, the less representative your workforce is of the population for that characteristic. The closer to 0 that number is, the more representative your workforce is of the population.
* Therefore, these figures are helpful in identifying where you may need to increase your representation of certain characteristics. Where there is the least representation, you could set targets to bring you closer to the characteristics of the population.

Executive to staff

Compare the characteristics of your executives to your staff.

Executives should include the executive management team who take decisions for the organisation. They will likely hold responsibilities for setting the strategic direction and overseeing management of resources to ensure the organisational objectives are met. We would expect this to include chief executives, managing directors and senior leaders. However, the exact roles that are included may differ between organisations of different sizes and structures.

**Column descriptions:**

* **Staff Number and Staff %:** These are calculated automatively from the workforce numbers you provided in ‘Workforce by characteristic’, minus the executive numbers entered in this tab.
* **Executive to staff**: Similar to the workforce by characteristic tab, the “Executive to staff” column calculates the percentage point difference between the proportion of your executives with that characteristic and the proportion of your staff. “Executive to staff (excl. prefer not to say and don't know)” performs the same calculation but excluding ‘Prefer not to say’ and ‘don’t know’ responses. These are interpreted in the same way as “Workforce to population” figures, as explained in the previous section.

**To complete the executive tab:**

* Populate the highlighted cells with the number of your executive staff who have each characteristic. By ‘executive’ we mean your executive management team who take decisions for the organisation. They will likely hold responsibilities for setting the strategic direction and overseeing management of resources to ensure the organisational objectives are met. For most organisations, this is their chief exec and directors of services (or similar).[[2]](#footnote-2)
* Once you have populated these cells, the executive percentages and executive to staff comparison should calculate automatically.

Board to staff

Compare the characteristics of your board with the characteristics of your staff. We suggest including all board members who have voting rights. This includes any executive directors who sit on your board, meaning that some people will be captured in the executive and board figures.

**To complete the board tab:**

* Populate the highlighted cells with the number of your board members with each characteristic.
* Once you have populated these cells, the board percentages and board to staff comparison should calculate automatically.

**Column descriptions:**

* **Staff Number and Staff %:** Reflect the same figures in the Executive to staff tab.
* **Board to staff:** As with the Executive to staff tab, calculates the percentage point difference between the proportion of your board with that characteristic and the proportion of your staff. Interpreted in the same way as “Workforce to population” figures, as explained in that section of the guidance.

Customer to workforce

Compare the characteristics of your customers[[3]](#footnote-3) with either the characteristics of your workforce or the characteristics of the population where your stock is located.

Comparing your customers to the population could be useful for identifying where the characteristics of your customers vary to those of the population. If you identify that there are some differences, then you can use the tab to compare your workforce to the population to see where you may need to improve representation and inform target-setting.

**To complete the customer tab:**

* In cell E2, select whether you would like to compare your customer characteristics with your workforce or with the wider population.
* Populate the highlighted cells with the number of customers with each characteristic.
* Once you have populated these cells, the customer percentages and workforce or population to customer percentages should calculate automatically.
* The totals for each question should match (and be equal to the total number of customers you serve).

**Column descriptions:**

* **Workforce Number:** reflects workforce numbers added to Workforce by characteristic tab.
* **Workforce or population %:** either reflects workforce % or population % from Workforce by characteristic tab, depending on the selection made in cell E2.
* **Customer to workforce or population:** The percentage point difference between the proportion of your customers with that characteristic and the proportion of either your workforce or the population where your stock is located, depending on the selection made in cell E2.

If you have any questions or feedback about the tool, please contact **Katie Hipkiss, Research Lead at** [**research@housing.org.uk**](mailto:research@housing.org.uk?subject=EDI%20Data%20Tool).

1. We suggest correcting the stock data if there is more than a 5% difference between the stock data from the SDR and the data you hold about your stock. [↑](#footnote-ref-1)
2. The exact roles that are included may differ between organisations of different sizes and structures.

   If it is not clear which roles make up your executive team, it may be helpful to consider how you will be using use the information held within the EDI tool to explore mobility upwards through your organisational structure and where it would be helpful to make a comparison between those below or above a specific level of seniority. [↑](#footnote-ref-2)
3. There are several terms which can be used to refer to people who live in social housing, including “customers”, “tenants” and “residents”. The EDI data tool uses the term “customers” in order to align with many reporting systems. [↑](#footnote-ref-3)