



Chartered
Institute of
Taxation.

Independent Chair: Joint Equality, Diversity and Inclusion (EDI) Committee

Role Information Pack
August 2025

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Welcome

Thank you for showing interest in the Independent Chair: Equality, Diversity and Inclusion (EDI) Committee role. As two educational charities and the leading professional bodies in the UK for tax advisers and tax technicians who address all aspects of taxation, if successful, you will be volunteering for a dedicated team of volunteers and staff. Our primary goal is to create a more efficient and simplified tax system for everyone. As shown in our annual reports (ATT: Annual Reports CIOT: Annual Reports), we pursue this objective through various activities.

The Joint Equality, Diversity and Inclusion Committee is a joint committee established by the Association of Taxation Technicians (ATT) and the Chartered Institute of Taxation (CIOT), reporting to each of their respective Councils, which are governed by charity trustees. This pack provide more information about the committee and the role and we hope to recommend our new Independent Chair for appointment by both Councils (the Board of Trustees) in December 2025.

We hope you will consider applying for this volunteer role and become part of our friendly and committed team.

Jane Ashton

Helen Whiteman

ATT CEO

Chief Executive, CIOT



Message from the current Chair

Over the past three years, I've had the privilege of serving as the Independent Chair of the Joint Equality, Diversity, and Inclusion (EDI) Committee for the Chartered Institute of Taxation (CIOT) and the Association of Taxation Technicians (ATT). It's been a deeply meaningful journey—working with passionate committee members, staff, and senior leaders who are truly committed to building a more inclusive and welcoming professional community.

One of the proudest milestones during this time has been the creation and adoption of the very first Joint EDI Strategy by both the CIOT and ATT Councils. This four-year plan (2023–2026) represents a shared promise: that every member, student, staff member, and volunteer feels seen, supported, and valued.

What's stood out most to me is the spirit of openness and continuous learning that has underpinned this work. I've been particularly inspired by the thoughtful contributions of both organisations' leadership teams with credit to y both Helen Whiteman and Jane Ashton (Chief Executives) —who've helped shape the strategy with care and conviction.

Of course, the journey is far from over. EDI work is ongoing, and the Committee remains energised to continue evolving the strategy—paying closer attention to key areas, like disability and race inclusion, where we can do even more.

I know that making real progress in EDI can sometimes feel challenging, even uncomfortable and that's a good sign. It means we're facing important questions, breaking down barriers, and moving forward together. The Committee is here to support that progress every step of the way, helping CIOT and ATT to ensure that the professions continue to more fully reflect the diversity of the world around us—and the value on inclusion and equity that we all hold dear

Olayinka Iwu

Chair, Joint Equality, Diversity and Inclusion Committee

About the CIOT and ATT

The Association of Taxation Technicians (ATT) and the Chartered Institute of Taxation (CIOT) are leading educational charities and professional bodies. We are committed to ensuring that our students, members, volunteers and staff feel welcomed, valued and supported, recognising that fostering an inclusive and supportive environment is essential to delivering our charitable objects and delivering wider public benefit.

The committee supports the charity in maintaining robust systems of financial control, risk management and assurance. It helps ensure that risks are identified, assessed and managed effectively across the organisation. The committee meets quarterly and reports annually to both Councils (Board of Trustees) on its work and findings.

We employ approximately 100 staff, most of whom work remotely, with occasional attendance at our modern and accessible Westminster offices. In addition, we have c. 750 volunteers. We are committed to equality, diversity and inclusion (EDI) and seek to reflect this in the composition of our committees, including the Joint Audit and Risk Committee, as well as in the wider community of people who work and volunteer with us. We welcome applications from people from all backgrounds, experience and identities. We believe that boards and committees composed of people with a range of experiences and perspectives are better placed to provide constructive challenge, encourage debate and make well-rounded decisions. With your support, the charities can continue to build on our progress towards becoming even more inclusive, accessible, diverse and equitable organisations.

Advancing EDI: Our progress and commitment

The charities are committed to increasing the visibility of our EDI actions in support of students, members, volunteers and staff. Our aim is to actively encourage and champion a more inclusive profession and workforce, contributing to our charitable objectives and supporting the delivery of public benefit.

Notable outcomes recently achieved by the Joint Equality, Diversity and Inclusion Committee for the charities include:

1. **Inclusive Language Guide:** The committee developed an inclusive language guide to promote accurate and non-offensive professional communication among staff and volunteers. This guide will be regularly updated to reflect evolving language usage and norms.
2. **Diversity Events and Awareness:** A series of events focused on diversity were successfully organised, including webinars for International Women's Day and discussions on topics such as neurodiversity and menopause. These initiatives have raised awareness and provided valuable education for the membership.
3. **Member Support Initiatives:** The committee established a working group to support members returning to work after career breaks and implemented a proactive outreach process for students who have passed their exams but have not yet applied for membership, aiming to provide additional support and guidance.
4. **Website Accessibility Improvements:** The redesign of the Tax Adviser website (www.taxadvisermagazine.com) incorporated accessibility features, such as updated font sizes and colours for the partially sighted.
5. **Member Surveys and Feedback Mechanism:** The committee conducted independent surveys of students and members to benchmark progress and inform future EDI strategies. This commitment to continuous improvement includes plans for further surveys to gather feedback and enhance EDI initiatives in 2025.

We are working to develop, promote and embed a culture of EDI. This programme of work will benefit both charities in the following ways:

- **Enhanced Community Representation:** By fostering a culture of EDI, we aim to reflect the diverse demographics of our membership, leading to a stronger and more representative community within both charities.
- **Increased Engagement and Collaboration:** Promoting EDI initiatives will encourage broader participation and collaboration among members and stakeholders, creating a more inclusive environment where all voices are heard and valued.
- **Improved Programme Accessibility:** Our commitment to embedding EDI principles will ensure that all services, events and resources are accessible to individuals from various backgrounds, thus increasing overall participation and satisfaction.
- **Stronger Brand Recognition:** By championing EDI values, both charities will enhance their reputations and brand awareness, positioning themselves as leaders in promoting fairness and inclusivity within the sector.

It will also benefit the public and our students, members, volunteers and staff in the following ways:

- Enhancing accessibility and inclusivity for all stakeholders, enabling greater participation and engagement from students, members, volunteers and staff.
- Fostering a supportive and diverse environment that empowers individuals from various backgrounds to share their perspectives and experiences.
- Improving overall service delivery and communication, ensuring that the needs and feedback of the public, students, members, volunteers and staff are effectively addressed.

At the heart of the charities, we are open and welcome to all as a profession to our students and members, at our branches, through our volunteer network and at head office.

About the Joint Equality, Diversity and Inclusion Committee

Acting under the delegated authority of ATT and CIOT Councils, the Joint Equality, Diversity and Inclusion Committee's primary objective is to promote a culture among students, members, volunteers and staff that values difference and recognises the benefits that diverse backgrounds and experiences bring to our work.

In recognition of the fact that diversity improves debate and leads to better decisions, the purpose of the committee is to ensure that there is an integrated, proactive approach to EDI that meets the needs of the charities, is informed by sector best practice and supports the achievement of the charities' objects.

The Joint Equality, Diversity and Inclusion Committee has between six and ten members and is made up of the following:

- an Independent Chair
- a Vice-Chair
- at least one Council member from ATT Council and one Council member from CIOT Council
- other committee members drawn from the membership of the charities, and
- External independent committee members with desirable expertise, knowledge or skills.

The Chief Executives of ATT and CIOT serve as the lead officers for both charities, with the Head of HR and Facilities attending all meetings. All committee appointments require formal approval from both Councils. External expertise may be invited or commissioned to contribute to specific meetings or defined areas of work when deemed appropriate by the lead officers in consultation with the Chair.

Role of the Independent Chair

The Chair is responsible for ensuring that the Joint Equality, Diversity and Inclusion Committee fulfils its purpose and responsibilities effectively. This includes providing reports and advice to both Councils, with attendance at relevant parts of Council meetings as required. The role also requires ongoing engagement with lead officers, the committee, other ATT and CIOT standing committees, subcommittees, technical committees, branches, working groups and other relevant external stakeholders to support the committee's activities effectively.

The role of the Chair includes, but is not limited to, the following:

- a. to provide leadership
- b. to ensure that the committee's business is conducted in an orderly fashion and ensure all members obtain a fair hearing
- c. to ensure that the work of the committee is consistent with its agreed remit and terms of reference and that issues of interest to other committees or the wider organisation are appropriately referred
- d. to ensure the committee does not take decisions outside its authorised powers
- e. to ensure any decisions taken by the committee are clear and unambiguous
- f. to consult with other committee members and provide advice and support
- g. to ensure (so far as possible) that decisions represent the collective view of the committee or (where consensus cannot be reached) a majority view
- h. to determine, in consultation with the Executive of the committee, the content of meeting agendas, the order in which items are taken and the amount of time to be devoted to each
- i. to monitor the implementation of agreements and action points from previous meetings
- j. to undertake ad hoc work as the chair of the committee (e.g. through the provision of advice or attendance at other relevant meetings or events)
- k. to support, on completion of the term of office, the incoming chair through the provision of advice and de-briefing, and
- l. to direct any person to be excluded from a meeting for any item of business, for example, on grounds of confidentiality or a conflict of interest.

Person specification

The Independent Chair of the Joint Equality, Diversity and Inclusion Committee must be able to demonstrate:

- knowledge and experience of equality, diversity and inclusion, as they relate to individuals and organisations (preferably at a strategic level)
- a commitment to both charities' visions and values
- a commitment to equality, diversity and inclusion and the social mobility agenda
- experience of sitting on a formal or informal committee, or strategic group
- integrity, strategic vision, good independent judgement and willingness to speak their mind
- the ability to engage with all levels of volunteers and staff
- understanding of the voluntary sector, the importance of good governance and current challenges around EDI-related matters
- enthusiasm for driving change and sustaining strategic momentum
- the ability to act impartially and apolitically, and
- the ability to constructively challenge and question at a strategic level.

Appropriate training and support will be provided to enable the right individual to succeed as chair.

Time commitment

We expect the time commitment for the Independent Chair role to be approximately six to eight days a year. This will include chairing quarterly Joint Equality, Diversity and Inclusion committee meetings (usually two to three hours per meeting), with the remainder for preparation, background reading and other meetings or calls with relevant staff and colleagues. Currently, most meetings are conducted remotely and we expect this to continue, with in-person meetings taking place once per year.

The Independent Chair is expected to serve a term of up to three years; however, this can be extended. This is a voluntary position and does not constitute employment. It is unpaid and carries no entitlement to salary, benefits or other remuneration. In line with our volunteer expenses policy,

reasonable expenses can be claimed for attendance at committee meetings and other meetings necessary to fulfil the chair's duties.

The committee currently reports to both Councils annually.

Why volunteer with us?

As two charities, serving the tax education needs of the public, including the disadvantaged, is at the forefront of our minds. With support from our dedicated staff and more than 750 volunteers, we engage with the government on tax policy. Our volunteers are composed mainly of tax specialists, who add valuable insights and expertise that enhance our efforts. In return, volunteers have the opportunity to network with fellow professionals as they assess and discuss changes in tax policy and organise and facilitate professional events.

Our work is of great significance in the tax arena. We are frequently cited across a range of media and provide evidence and detailed submissions to government ministers, parliamentary select committees, public bill committees and equivalent committees in the devolved administrations. In addition to this, around five million members of the public visit our Low Incomes Tax Reform Group's website (www.litr.org.uk) annually to gain the understanding they need to navigate the complexity of how tax affects them personally.

We invite you to contribute your time, expertise and insight to make a meaningful impact on our work.

The benefits of volunteering include:

- Opportunities to gain new experiences, build professional connections and develop insights into charitable governance and practice.
- Enhancing your CV by contributing to the strategic leadership and governance of a charitable organisation.
- Provision of a reference in recognition of your voluntary service.
- Collaborating with experienced professional staff.
- Access to relevant training and development, where required, to support you in your voluntary role.
- Invitations to attend volunteer events hosted by the charities.

Most importantly, you will help us make a positive difference in how our approach to equality, diversity and inclusion strategy is developed, implemented and understood due to your influence.

To find out more about us and our work, please visit www.tax.org.uk and www.att.org.uk.

For more information on our volunteering benefits, please visit www.att.org.uk/volunteering and www.tax.org.uk/networking.



How to apply

To apply for this voluntary role, please submit the following by email:

1. A copy of your CV, detailing your educational and professional qualifications, employment history and any voluntary positions held.
2. A personal statement, of no more than 1,500 words, demonstrating how you meet the requirements detailed in this role description, outlining your suitability, including relevant skills, life experience and expertise.
3. The Equality Monitoring Form (optional). The Equality Monitoring Form is used solely to assess the fairness and effectiveness of our selection processes. It is entirely confidential, kept separate from your application and does not form part of the selection process.

If you would like to discuss the role in more detail or require additional information, please contact Rosalind Baxter at rbaxter@ciot.org.uk.

Please email your CV and personal statement, along with the optional Equality Monitoring Form, to Sarah Tempany at stempany@ciot.org.uk by midnight on 10 October 2025. Shortlisted applicants will be invited to attend a panel interview to be held on 3, 4, 11 and 12 November 2025.

Thank you for your interest. We wish you every success with your application.

