Lay Trustee
(Finance and Business Expertise)

Information pack for candidates

Closing date:  12 August 2022 5pm.
Interview date:  23 August 2022
### Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letter from the Chair of the Board</td>
<td>3</td>
</tr>
<tr>
<td>Profile of the Faculty of Medical Leadership and Management</td>
<td>4</td>
</tr>
<tr>
<td>Governance Arrangements</td>
<td>5</td>
</tr>
<tr>
<td>Independent Trustee Role and Responsibilities</td>
<td>6-7</td>
</tr>
<tr>
<td>Independent Trustee Person Specification</td>
<td>8</td>
</tr>
<tr>
<td>Remuneration</td>
<td>8</td>
</tr>
<tr>
<td>Time Commitment</td>
<td>8</td>
</tr>
<tr>
<td>Term of Office</td>
<td>9</td>
</tr>
<tr>
<td>Induction and Training</td>
<td>9</td>
</tr>
<tr>
<td>How to Respond</td>
<td>9</td>
</tr>
<tr>
<td>Appendix A – Terms of Reference for Board of Trustees</td>
<td></td>
</tr>
<tr>
<td>Appendix B – Terms of Reference for Finance, Audit and Risk Committee</td>
<td></td>
</tr>
<tr>
<td>Appendix C – Reference Request Form</td>
<td></td>
</tr>
<tr>
<td>Appendix D – Declarations of Interest &amp; Trustee Eligibility</td>
<td></td>
</tr>
<tr>
<td>Appendix E – Equality &amp; Diversity Monitoring Form</td>
<td></td>
</tr>
</tbody>
</table>
Letter from the Chair of the Board

Dear Candidate

Thank you for your interest in joining the Board of Trustees of the Faculty of Medical Leadership and Management (FMLM). The Faculty of Medical Leadership and Management, established in 2011 by all the UK medical royal colleges and faculties and endorsed by the Academy of Medical Royal Colleges, is the UK professional home for medical leadership. Our primary objective is to raise the standard of patient care by improving medical leadership.

This is an interesting and exciting time in our evolution as we celebrate our tenth anniversary. In 2022, we launched our new five-year strategy. This builds on an exciting foundation of over 2,500 engaged UK and international members and fellows, widely adopted professional standards, a strong track-record in providing quality leadership development and support, and a healthy financial position.

The pandemic has clearly demonstrated the importance of effective medical leadership. FMLM is proud to have played a significant role in supporting doctors and dentists of all career stages at a crucial time and this work continues to expand by popular demand.

FMLM is seeking to appoint a Trustee with significant experience and qualifications in business and/or finance who will ensure that effective and appropriate financial measures, controls and procedures are in place for the charity. The Trustee is accountable to the Chair of the Board.

A profile of FMLM, details of the Trustee role and responsibilities of the Board are set out in this information pack.

We look forward to receiving your application.

Yours faithfully

Dr Mayur Lakhani
Chair
Faculty of Medical Leadership and Management Board of Trustees
July 2022
Profile of FMLM

The Faculty of Medical Leadership and Management (FMLM) was established in 2011 by all of the UK medical royal colleges and faculties as the UK professional home for medical leadership. It is a registered charity (no.1178741) with the charitable aim of improving patient care through better medical leadership. FMLM believes that all practising doctors and dentists need leadership and management skills commensurate with the level at which they work, and research evidence shows that better leadership and team-working are associated with improved care for patients and lower mortality.

To meet its charitable aims, FMLM groups its activities under three main areas:

- Professionalisation of medical and dental leadership
- Research and dissemination of evidence in relation to medical and dental leadership
- Leadership development support (often multi-professional) to organisations and individuals.

Professionalisation of medical and dental leadership
To underpin the professionalisation agenda, uniquely FMLM has defined the Leadership and management standards for medical professionals and offers a bespoke 360-degree feedback tool and certification process for individuals to be benchmarked against these standards leading to fellowship of FMLM. Furthermore, FMLM offers healthcare organisations the opportunity to be recognised for their investment in medical leadership by becoming FMLM affiliates. This is an explicit demonstration that an organisation has adopted the FMLM Standards and is committed to excellence in clinical leadership and supports its doctors and dentists to become better leaders.

Research into medical and dental leadership
The pandemic has demonstrated the enormous power of medical research. Research into medical leadership also has the power to enhance patient care through identifying the most effective types of clinical leadership and how to support clinicians to achieve them. FMLM supports a growing, internationally renowned collaboration of researchers in this important field as well as leading some research projects itself. It also makes a major international contribution to the promotion of research findings through its co-owned, journal, BMJ Leader and annual international conference.

Individual and organisational leadership development
FMLM offers niche leadership development for doctors and dentists in leadership and management roles, through a separately owned trading arm, FMLM Applied. The aim is to support healthcare teams, practices, organisations and systems to improve outcomes for patients and populations through effective leadership. FMLM Applied draws on research evidence and the FMLM standards to provide bespoke packages of support, tailored to the needs of clinical professionals within their teams and organisations. This work is increasingly recognised by the NHS at a national, regional and local level.

For more information visit our website https://www.fmlm.ac.uk/
FMLM’s Governance Arrangements

Board of Trustees
The Board of Trustees executes the responsibilities of trustees as defined by the Charities Act, company law and related statutes and guidance. The Board of Trustees currently comprises:

- Chair (next elections will take place in mid-2022)
- Treasurer (To be replaced by a Trustee with obligatory Finance and Business expertise)
- Representatives of the royal medical colleges
- UK country representative
- Lay members (appointed by the Board)
- Co-opted members to address any representational or expertise deficit

All members of the Board are Trustees as defined by the Charity Commission as well as Directors of FMLM, a company limited by guarantee. (See Appendix A for Board Terms of Reference).

Articles of Association
FMLM is currently reviewing its Articles of Association and creating Standing Orders which better reflect the needs of the organisation. The Board has agreed that the Articles should be amended in order to ensure the FMLM has a fit-for-purpose document that is future-proofed and enables the recent changes to the committee structures that have been agreed to be implemented.
Lay Trustees – Role and Responsibilities

As a Lay Trustee with significant experience and qualifications in business and/or finance (and relevant qualifications), your role will be to use your skills, personal and professional experience to contribute to the work of the Board. You will be a Director of FMLM, a company limited by guarantee, and your directorship will be registered at Companies House.

Specific requirements for this role are:

• Ensure that FMLM’s finances are managed in accordance with the Charities Act 2022 and more specifically the requirements for a small charity in accordance with the regulations of the Charity Commission.
• Develop, communicate and monitor the delivery of FMLM’s vision and strategic aims.
• Support and advise on the appropriate, accurate and timely recording and reporting of all financial accounts and statements.
• Ensure all funds are accounted for and spent in alignment with FMLM’s core purpose, strategic aims, policies and in compliance with governance, legal and regulatory frameworks.
• Support the Board in maintaining the financial viability of FMLM.
• Advise on financial processes and policies to ensure they are robust and fit for purpose.
• Support the charity to respond appropriately to external audits, liaising directly with the auditors and our Finance team as required.

General Trustee responsibilities include the following:

Leadership

• Promote the vision, values and objectives of FMLM and take an active role in supporting the organisation’s strategy.
• Assist fellow Trustees in agreeing strategic aims, ensuring that the necessary financial and human resources are in place to meet its objectives, and that performance is effectively monitored and reviewed.
• Engage positively and collaboratively in Board discussion of agenda items.
• Work constructively with Board members and FMLM’s Senior Management Team to collaborate and problem solve, demonstrating leadership which aligns to FMLM’s values.
• To advocate for FMLM through proactive facilitation of connecting FMLM to relevant networks and professional bodies their representatives.

Monitoring

• In accordance with agreed Board procedures, monitor the performance and conduct of management in meeting agreed goals and objectives and statutory responsibilities, including the preparation of annual reports and annual accounts and other statutory duties.
• Participate in committees as determined and delegated by the Board of Trustees.
Governance

- Commit to working to, and encouraging within FMLM, the highest standards of probity, integrity and governance and contribute to ensuring that the internal governance arrangements conform to best practice and statutory requirements.
- Provide independent judgement and advice on issues of strategy, vision, performance, resources and standards of conduct and constructively challenge, influence and help the Board develop proposals on such strategies.
- Obtain assurance that financial information is accurate, and that financial controls and risk management systems are robust and defensible.
- Bring independent judgement and experience based on commercial, financial, legal or governance expertise and apply this to the benefit of the organisation, its stakeholders and its wider community.
Lay Trustee – Person Specification

Applications are particularly welcomed from candidates who have diverse backgrounds.

Essential Knowledge and Experience

- Senior management/leadership experience at board level or equivalent
- A good understanding of budgets, strategy and people issues
- Significant experience and qualifications in business and/or finance

Desirable Knowledge and Experience

- Charity governance and fundraising
- Financial leadership and/or management in charities or the public sector
- Commercial experience, especially related to business growth
- Senior management/leadership experience of a complex, multi stakeholder organisation
- Experience/understanding of a professional membership body
- An understanding of professional leadership development
- Experience of investments in the non-profit sector
- Knowledge of healthcare systems in the UK/at national level

Remuneration

Lay trustee roles are not remunerated. Travel and subsistence costs incurred in carrying out duties as a Lay trustee will be reimbursed by the charity.

Time Commitment

The successful candidate(s) will need to devote sufficient time to ensure satisfactory discharge of their duties:

1. Attend a minimum of three online Board meetings a year. According to the decisions of the Board there may be additional sub-committees to attend.
2. Attend a minimum of three online Finance, Audit and Risk Committee meetings per year. (See Appendix B for Terms of Reference).

In addition, there would be some ad-hoc activity and also a requirement to comment on issues and respond to questions by e-mail.

It is also expected that the Lay Trustee who holds financial and business expertise will mentor FMLM’s Head of Finance thoroughly regular online meetings (frequency to be agreed by both parties).
Term of Office

Appointment will be for a period of three years, with the possibility to extend for a further two years.

Induction and Training

FMLM will organise appropriate induction and training for the successful candidate.

Application Process

Please send us the following application documents:

1. CV
2. Covering letter of no more than 2 pages
3. Reference Request Form (Appendix C)
4. Signed Declaration of Interests and Trustee Eligibility Form (Appendix D)
5. Completed equality and diversity monitoring form (Appendix E)

The closing date is 12 August 2022 @ 5pm.

Applications and all related enquiries should be submitted by email to:

Yasmin Ali | Director of Corporate Services
E: yasmin.ali@fmlm.ac.uk
Appendix A
Board of Trustees
Purpose and terms of reference
Effective from 1 January 2022 (approved 08.12.21)

Overall purpose
To
- Provide strategic direction and oversight for all FMLM activities;
- Act as critical friend to the FMLM executive so as to ensure the FMLM works efficiently and effectively in developing and delivering its programmes of work;
- Ensure that the FMLM is engaged with its Fellows, members and wider stakeholders and involves them appropriately in its work;
- Ensure that the FMLM is well governed having regard to current good practice and regulatory and mandatory requirements.

Terms of Reference

Strategic direction
1. Periodically agree the strategy for the FMLM ensuring that its members and wider stakeholders have input to the strategy.
2. Ensure that annual operating plans are developed and agreed to implement the strategy; this to include annual budgets.
3. Ensure that key deliverables under the strategy and the operating plans are met and to explore reasons for non-achievement or delay.

Critical friend
4. Agree arrangements for holding the FMLM executive to account including setting appropriate performance indicators.
5. At meetings of the Board (and through other opportunities), ensure the performance of the executive is in accordance with the requirements of the FMLM as a charity and trading company, within the current strategy and operating plan and other operating documents.
6. Provide support and guidance to the executive to help ensure that the FMLM is operated efficiently and effectively.

Stakeholder engagement
7. Agree and review periodically arrangements to ensure effective engagement with FMLM stakeholders.
8. Utilise intelligence about stakeholders to inform the development and direction of the FMLM, its future strategy and priorities and to develop effective messaging.
9. Ensure that Board members and others maintain a positive and supportive view of the work of the FMLM and their contribution to it.
Governance

11. Put in place and review periodically effective arrangements as regards governance. This should include but not be limited to:
12. Finance and financial management as regards budgets, progress, forecasting
13. Funding, including sufficiently broad income streams and sources of funding
14. Reputation and reputation management
15. Risk identification and risk management
16. Employer responsibilities
17. Charity and company law requirements
18. All other statutory and mandatory responsibilities
19. Principles of guidance on good governance for charities and trading companies
20. Ensure that FMLM’s statutory functions as a designated body are compliant and efficient and are reviewed periodically.
21. Approve and periodically review policies for the effective operation of the FMLM including but not limited to:
22. Delegation (Scheme of Delegation)
23. Conflicts of interest
24. Sponsorship
25. Ensure that policies in regard to financial governance including investment and the remuneration of employees (pay, pensions and other benefits) are developed, approved and periodically reviewed.
26. Define the data and information needed to exercise scrutiny and oversight and ensure it is provided accurately and in a timely manner to the Board.
27. Ensure that the FMLM is a reflective and learning body as regards effective governance and operation by periodically reviewing governance arrangements.

Subsidiary bodies

28. Establish such subsidiary bodies as are required and that can be resourced to enable the work of the Board and its plans to be effectively discharged, ensuring that each such body has a clear purpose and terms of reference, that programmes of work are appropriate, agreed, delivered and reported on.
29. Periodically review the purpose and remit of each subsidiary body.
30. Ensure that each subsidiary body refers to this Board any proposals or initiatives that would incur expenditure or future financial commitment by the FMLM not within the approved budget, for appraisal and consideration other than where authority to act has been delegated by the Board.
Duties of the Chair

32. The duties of the Chair include:
   a. Chairing all Board meetings
   b. Ensuring that the purpose and terms of reference are observed
   c. Engaging all members of the Board in the work being done
   d. Ensuring that relevant matters are drawn to the attention of Committee chairs or others as appropriate.

Operation

33. The Board will usually meet not more than three times per year on dates to be agreed unless exceptionally required to transact urgent business.
34. Meetings are usually held by virtual means/remote attendance, but in-person meetings may be arranged from time to time.
35. Board members may be called upon to consider matters virtually between meetings.
36. The quorum for Trustees’ meetings may be fixed from time to time by a decision of the Trustees, but it must never be less than five, and unless otherwise fixed it is five or one-third of the total number of Trustees, whichever is the greater.
37. Board members will abide by any stated or implied confidentiality that relates to the work of the Board during or after any period of membership.
38. Board members will comply with the provisions of the Data Protection Act 2018 as regards processing of any personal data where it is made available to them as part of their work.
39. The Board will work in accordance with prevailing arrangements for declaring and registering interests.

Date of next review: Autumn 2024
Appendix B
Finance, Audit and Risk Committee
Purpose and terms of reference
Effective 1 January 2022 (approved by Board of Trustees 08.12.21)

Overall purpose
To provide assurance and advice on financial processes and policies, budget setting, investment and the identification and management of risk in respect of all activities of FMLM.

Terms of Reference

Financial governance
1. Ensure that the financial governance and management of FMLM is effective, follows current good practice for charities and trading companies and to make recommendations for change or development in that regard as required.
2. Ensure appropriate accounting standards and practices are adopted including reporting and disclosure with appropriate control measures, taking account of the views of or recommendations made by the external auditor.
3. Ensure that there are in place effective and compliant policies for the financial management of FMLM activities and that such policies are kept under regular review and reflect current good practice.

Financial planning and performance
4. Review and recommend the adoption of draft annual budgets for the charity and the trading company.
5. Monitor performance against agreed budgets.
6. Ensure that annual financial statements represent the financial position of FMLM fairly.

Risk management
7. Ensure that there are effective policies and arrangements to identify and manage risk across all FMLM activities including risk in respect of projects or new initiatives and as regards a forward-looking perspective (“horizon scanning”).
8. Scrutinise proposed new or different operations to assess if they pose significant risks to FMLM.

Investments
9. Ensure that appropriate policies and arrangements are in place for the management and performance of FMLM investments including appointing and oversight of any investment manager.
Regulation and compliance activities

10. Ensure there are policies and processes in place to prevent fraud, theft or bribery within or in the name of FMLM, considering reports of any alleged incidents together with remedial actions. Ensure remedial actions are taken in a timely manner.

11. Ensure there are policies and processes in place to comply with current data protection legislation and guidance; consider reports on any alleged breaches together with any remedial actions. Ensure remedial actions are taken in a timely manner.

12. Approve the arrangements for selection and approve the appointment of FMLM’s external auditors.

13. Ensure there are effective and compliant policies and processes for audit as regards internal control, external audit, and acting on audit recommendations. This includes the Committee meeting at least annually with the external auditor to review and discuss audit findings and agree actions required as a result; ensure that any actions are taken in a timely manner.

14. Approve transactions in accordance with authorisation levels indicated in the scheme of delegation policy.

15. Review the audited financial statements and recommend to the Board for sign off.

Other

16. Annually review and assess the business continuity plan and consider reports on the effectiveness of the plan if put into action.

17. Undertake such other appropriate activities as directed by the Board from time to time.

Membership

18. The Board of Trustees advised by the Committee will ensure that the Committee has the requisite skills and experience to discharge its business effectively. This will include but not be limited to:
   (a) finance and business
   (b) governance
   (c) medical and dental practice.

19. The Committee will comprise:
   (a) three trustees of the FMLM appointed by the Board of Trustees, one of whom is to be the trustee with substantial finance and business experience holding a relevant qualification
   (b) one lay trustee appointed by the Board of Trustees
   (c) up to three co-opted members appointed with approval of the Board for a period not exceeding a year to provide specialist skills, knowledge and experience.

20. The trustee members will serve for the duration of their term as trustees; the other members will serve for three years and may be re-appointed for a further term not exceeding three years.

21. All members should have regard to FMLM’s objectives, structure and the context within which it operates.
Chair

22. The Chair will be appointed by the Board from among its members; the Chair of the Board may not also chair this Committee.

23. The Chair will be a trustee of the FMLM, will serve for three years and may be re-appointed to serve a further term not exceeding two years. On demitting as a trustee, chairing and membership of this Committee shall also cease.

24. The duties of the Chair include –
   (a) Chairing all meetings
   (b) Ensuring that the purpose and terms of reference are observed
   (c) Engaging all members of the Committee in the work being done
   (d) Ensuring that relevant matters are drawn to the attention of the Board or other Committee chairs or others as appropriate.

24. In the absence of the Chair, another trustee present will be appointed to chair the meeting.

Operation

25. The Committee will usually meet not more than three times per year on dates to be agreed unless exceptionally required to transact urgent business.

26. Meetings are usually held by virtual means/remote attendance, but in-person meetings may be arranged from time to time.

27. Committee members may be called upon to consider matters electronically between meetings.

28. The quorum at meetings of the Committee is two trustee members.

29. In the event of an equality of votes, the chair of the meeting shall have a second or casting vote.

30. Co-opted members of the Committee have the right to contribute to discussion but not to vote on any matter.

31. The Committee is accountable to the Board of Trustees; the minutes of or a report on each meeting of the Committee will be submitted to the Board.

32. Committee members will abide by any stated or implied confidentiality that relates to the work of the Committee during or after any period of membership.

33. Committee members will comply with the provisions of the Data Protection Act 2018 as regards processing of any personal data where it is made available to them as part of their work.

34. The Committee will work in accordance with prevailing arrangements for declaring and registering interests.

Date of next review: Autumn 2024
Appendix C - Reference Details Form

I confirm that as part of my conditional offer, I consent to FMLM obtaining an employment reference from the referee(s) listed below ☐

FMLM is fully committed to compliance with the requirements of the General Data Protection Regulations.

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<tr>
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<tr>
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<td>Employer Address</td>
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<td>Position Held</td>
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<tr>
<td>Contract Type</td>
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<td>Start Date</td>
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<tr>
<td>Referee Name</td>
</tr>
<tr>
<td>Referee Position</td>
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<td>Referee Email Address</td>
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<tbody>
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<td>Position Held</td>
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<td>Start Date</td>
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<tr>
<td>Referee Name</td>
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<td>Referee Position</td>
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<td>Referee Email Address</td>
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<td>Referee Contact Number</td>
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Candidate Name in full | Date |
Appendix D
The Faculty of Medical Leadership and Management (FMLM)
Declarations of Interests and Trustee Eligibility Form

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<tr>
<td>Date</td>
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<tr>
<td>Role</td>
<td>Finance and Business Trustee</td>
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**Trustee eligibility and responsibility**

By completing and signing this form, you declare that you:

1. are willing to act as a trustee of the organisation named above
2. understand your organisation’s purposes (objects) and rules set out in its governing document
3. are not prevented from acting as a trustee because you:
   a) have an unspent conviction for one or more of the offences listed here*
   b) have an IVA, debt relief order and/or a bankruptcy order
   c) have been removed as a trustee in England, Scotland, Northern Ireland or Wales (by the Charity Commission or Office of the Scottish Charity Regulator)
   d) have been removed from being in the management or control of any body in Scotland (under relevant legislation)
   e) have been disqualified by the Charity Commission
   f) are a disqualified company director
   g) are a designated person for the purposes of antiterrorism legislation
   h) are on the sex offenders register
   i) have been found in contempt of court for making (or causing to be made) a false statement
   j) have been found guilty of disobedience to an order or direction of the Charity Commission

| A. Posts held in the ordinary course of employment, self-employment or practice |  |
| B. Membership of other professional bodies |  |
| C. Offices held in a professional body, specialist society or other organisation |  |
| D. Trusteeships, consultancies, directorships or advisory positions |  |
I have declared all relevant interests in respect of application for the role of Finance and Business Trustee with FMLM ☐

I understand that failure to disclose anything about my professional or personal background which, if brought into the public domain, may cause embarrassment or disrepute to FMLM could result in an appointment being terminated ☐

Signed:

Date:

*A Director of FMLM or FMLM Applied should consider close family connections in this respect and give any relevant details. This means interests held by spouse, civil partner, child, parent, brother or sister, whether natural, adoptive or by marriage.
Appendix E – Equality & Diversity Monitoring Form

The Faculty of Medical Leadership and Management wishes to meet the aims and commitments set out in its Equality and Diversity policy. This includes not discriminating under the Equality Act 2010 and building an accurate picture of the make-up of our Boards and Committees in encouraging equality, diversity and inclusion.

The organisation needs your help and co-operation to enable it to do this but filling in this form is voluntary. The information provided will be managed in accordance with the Data Protection Act 2018, will be used for monitoring purposes and will be kept confidential.

If you have any questions about the form, contact the Director of Corporate Services, Yasmin Ali via yasmin.ali@fmlm.ac.uk

Please return the completed form to hr@fmlm.ac.uk

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<tr>
<th>Gender</th>
<th>Male ☐</th>
<th>Female ☐</th>
<th>Intersex ☐</th>
<th>Non-binary ☐</th>
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<td></td>
<td>Prefer not to say ☐</td>
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If you prefer to use your own gender identity, please state:

Is the gender you identify with the same as your gender registered at birth?
Yes ☐  No ☐  Prefer not to say ☐

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<thead>
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<th>Age</th>
<th>16-24 ☐</th>
<th>25-29 ☐</th>
<th>30-34 ☐</th>
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<th>40-44 ☐</th>
<th>45-49 ☐</th>
<th>50-54 ☐</th>
<th>55-59 ☐</th>
<th>60-64 ☐</th>
<th>65+ ☐</th>
<th>Prefer not to say ☐</th>
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What is your ethnicity?
Ethnic origin is not about nationality, place of birth or citizenship. It is about the group to which you perceive you belong. Please tick the appropriate box:

Asian or Asian British
Indian ☐  Pakistani ☐  Bangladeshi ☐  Chinese ☐  Prefer not to say ☐

Any other Asian background, please state:Click or tap here to enter text.

Black, African, Caribbean or Black British
African ☐  Caribbean ☐  Prefer not to say ☐

Any other Black, African or Caribbean background, please state:
Mixed or Multiple ethnic groups
White and Black Caribbean ☐ White and Black African ☐ White and Asian ☐ Prefer not to say ☐

Any other Mixed or Multiple ethnic background, please state:

White
English ☐ Welsh ☐ Scottish ☐ Northern Irish ☐ Irish ☐
British ☐ Gypsy or Irish Traveller ☐ Prefer not to say ☐

Any other White background, please state:
Arab
Arab ☐ Prefer not to say ☐

Any other ethnic group, please state:

Do you consider yourself to have a disability or health condition?
Yes ☐ No ☐ Prefer not to say ☐

What is the effect or impact of your disability or health condition on your work? Please state:

The information in this form is for monitoring purposes only. If you believe you need a ‘reasonable adjustment,’ then please discuss this with the FMLM Director of Corporate Services.

What is your sexual orientation?
Heterosexual ☐ Gay ☐ Lesbian ☐ Bisexual ☐ Asexual ☐ Pansexual ☐
Undecided ☐ Prefer not to say ☐

If you prefer to use your own identity, please state:

What is your religion or belief?
No religion or belief ☐ Buddhist ☐ Christian ☐ Hindu ☐ Jewish ☐
Muslim ☐ Sikh ☐ Prefer not to say ☐

If other religion or belief, please state:
Do you have caring responsibilities? If yes, please tick all that apply

None ☐
Primary carer of a child/children (under 18) ☐
Primary carer of disabled child/children ☐
Primary carer of disabled adult (18 and over) ☐
Primary carer of older person ☐
Secondary carer (another person carries out the main caring role) ☐
Prefer not to say ☐

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<th>Candidate Name</th>
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