



New Dynamics

Policies and practice

Equal employment opportunity: a policy framework

Set clear equality principles, accessible support routes and accountable employment decision processes.

Practical guidance · Worked examples · Printable worksheet

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Inside this guide

Translate a commitment into decisions	3
Draft the core commitments	3
Make access and reporting usable	3
Worked example: an internal promotion	4
Policy completion worksheet	4
Monitor the process responsibly	4
Put the guide into practice	4
Frequently asked questions	6
Review the first cycle	6
About New Dynamics	6
Your working worksheet	8

Read in order for the full approach, or use the linked contents to find a section. The final worksheet gives you space to record decisions and next steps.

Set clear equality principles, accessible support routes and accountable employment decision processes. This practical guide to equal employment opportunity policy brings together a step-by-step approach, illustrative examples, a reusable worksheet and answers to common questions. Start with the section closest to your current challenge, then use the working session to turn the guidance into a clear next action.

Translate a commitment into decisions

An equal employment opportunity policy should describe how the organisation approaches fair access to hiring, work, development and progression. A statement of values is only the beginning. Identify the decisions where people need clear criteria and a route to raise concerns.

This is a drafting framework. Protected characteristics, accommodation duties, reporting rights and other legal requirements depend on jurisdiction. Review the final policy locally. The [EEOC employer resources](#) are a US reference and should not be presented as a global rulebook.

Draft the core commitments

A starting statement is: “Our organisation aims to make employment decisions using relevant, documented criteria and to provide fair access to opportunities. Discrimination and retaliation are not acceptable. Requests for support or accommodation will be handled through the designated process.” Confirm the legally appropriate language before adoption.

Define who the policy covers and which employment stages it addresses. Identify the manager responsibilities for applying criteria and the HR responsibility for advice, records and review. Include appropriate local appendices instead of implying that one list of legal protections applies everywhere.

Make access and reporting usable

Explain how applicants and employees request an adjustment or accommodation. Give a contact, an alternative route and an explanation of how personal information is handled. Managers should know when to refer a request rather than making an unsupported judgement themselves.

Provide a route for concerns about a decision and explain the relationship with grievance or other approved procedures. Protect against retaliation and avoid requiring an employee to report only through the person whose conduct they question.

Worked example: an internal promotion

Illustrative scenario: a team advertises an internal opportunity with clear role criteria and an application window. An employee requests an accessible assessment format through the designated contact.

The relevant team considers the request and documents the agreed arrangement without circulating unnecessary personal information to the panel. The panel assesses candidates using the same job-related criteria. Candidates receive an explanation of the process and an appropriate route to ask questions about the outcome.

Policy completion worksheet

- **Scope:** Which applicants, employees and other groups are covered?
- **Local requirements:** Which definitions and obligations need to be reflected?
- **Decision criteria:** How are job-related requirements documented and reviewed?
- **Support route:** Where are adjustment or accommodation requests handled?
- **Concern route:** What alternatives exist when the manager is involved?
- **Accountability:** Who reviews implementation and recurring barriers?
- **Approval and review:** Who signs off the policy and maintains it?

Check the policy against actual forms, systems and manager instructions. Contradictions between a public commitment and an internal workflow need to be resolved before launch.

Monitor the process responsibly

Review whether opportunities are communicated accessibly and decisions follow the stated criteria. Use authorised, proportionate analysis to examine patterns; aggregate results alone do not determine what happened in an individual case.

Seek feedback from people using the process and act on practical barriers. Keep sensitive records within appropriate access controls. Pair this framework with the [diversity and inclusion action guide](#) for everyday improvements and the [recruitment guide](#) for structured hiring.

Put the guide into practice

Set aside a working session with the people who own this process and one or two people who experience it. Use a fictional or appropriately authorised case, so the discussion can be specific without sharing unnecessary personal information. The purpose is to leave with a usable decision or document, not just agreement that the topic matters.

Prepare the case

Choose one decision stage, such as promotion or access to training, and identify its stated criteria. Trace how employees hear about the opportunity and request support. Ask whether the written policy matches the real workflow or whether informal nominations and undocumented exceptions determine access.

Write the starting assumptions down before discussing solutions. If the group disagrees on what happened, identify the information needed to resolve that difference rather than building a plan on an untested story.

Work through the decision

Apply the criteria to fictional examples and write the reasons for a decision. Check that the evidence relates to the work and that reviewers understand the support or adjustment process. If a requirement excludes someone, examine whether it is actually necessary rather than defending it simply because it has always been used.

Ask each participant to explain the proposed decision in their own words. Differences in interpretation often reveal an unclear criterion, a missing responsibility or an instruction that will be difficult to follow.

Test an exception

Test a concern raised about the person who normally receives complaints. Identify the alternative route and how retaliation concerns are handled. Also test an applicant who needs an accessible assessment. The organisation should have a clear process for considering the request without unnecessary disclosure or unsupported managerial judgement.

Record what changes in this situation and what remains the same. An exception should lead to a clear next step, with an owner, rather than an informal workaround that nobody can explain later.

Agree the handoff

Confirm the policy owner, local reviewers and operational owners of hiring, development and progression. Give each owner the changes needed in their forms and instructions. A signed policy should lead to consistent practical steps rather than sit separately from the processes employees actually encounter.

Finish by confirming the owner, the next action and the date when the result will be reviewed. Give the person receiving the work enough context to continue without repeating the whole discussion.

Frequently asked questions

Is an EEO policy only relevant to recruitment?

No. Fair access and employment decisions extend across work, development, promotion and other stages of the employee lifecycle. The precise legal duties depend on jurisdiction. A useful policy identifies its scope and links to the processes where people need clear criteria, support and a route to raise concerns. Recruitment is one important application, not the whole policy.

Should the policy list protected characteristics?

Use wording reviewed for the jurisdictions and worker groups covered. Legal definitions and protections differ, so do not copy a list from another country and present it as universal. A common organisational commitment can be supported by local appendices where needed. Keep the final wording current and make clear which process employees use for advice or a concern.

How does EEO differ from inclusion work?

An equal opportunity policy sets commitments, responsibilities and processes around fair employment practices and applicable duties. Inclusion work also examines everyday barriers to participation, information and opportunities. They support each other, but a policy statement does not by itself remove practical barriers. Use employee feedback and process review to identify changes that make the commitments real.

Review the first cycle

Review whether decisions use the stated criteria and whether support and concern routes are accessible. Examine exceptions and recurring barriers with appropriate specialists and privacy controls. Communicate process improvements clearly, while keeping personal cases confidential and avoiding broad claims based only on policy publication.

Keep a brief record of what was tried, what participants found useful and what needs to change. Compare the result with the original problem rather than judging success only by completion. If the process created extra work without improving clarity, quality or support, simplify it and test again. Share the agreed change with the people who will use it, and name the person responsible for keeping the guidance current.

About New Dynamics

[New Dynamics](#) connects goals, feedback, recognition and reviews around the way organisations work. This guide is published by the New Dynamics Editorial Team as part of our practical library for HR leaders, managers and People teams.

Use the examples and worksheets to structure your own discussions and adapt them to your organisation. Illustrative scenarios are not customer case studies. Policy and employment guidance needs appropriate local review before adoption.

For questions about this guide, corrections or a conversation about your performance management process, email contact@new-dynamics.com. Explore the complete [guide library](#) for related resources.

Your working worksheet

Use the prompts from this guide to prepare one real conversation or decision. Keep personal or sensitive information in your organisation's approved records. This page is for your own working notes.

Scope: Which applicants, employees and other groups are covered?

Local requirements: Which definitions and obligations need to be reflected?

Decision criteria: How are job-related requirements documented and reviewed?

Support route: Where are adjustment or accommodation requests handled?

Concern route: What alternatives exist when the manager is involved?

Accountability: Who reviews implementation and recurring barriers?

Approval and review: Who signs off the policy and maintains it?

Discuss your next step with New Dynamics: contact@new-dynamics.com