

# Step-by-step guide to completing the 2026 EDI Data Tool

March 2026

There are five tabs to be completed by housing associations. This document provides a step-by-step guidance to completing each of those tabs.

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](#).

Here you can also find the [suggested questions to ask your workforce](#), which are reflected in the tool.

## 1. Stock

- Select your organisation from the drop-down list at the top of the Stock tab, this will populate columns B and C with your owned stock, taken 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.<sup>1</sup> You can choose whether to include owned and/or managed stock. The percentages in column H should calculate automatically.
- Stock data is also 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'. If you select 'Yes' in cell C4 of the stock tab, these 'Population by stock location' figures are calculated from the SDR stock. If you select 'No', they are calculated from the numbers you populate in column G of the stock tab.

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<sup>1</sup> 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.

## 2. Workforce by characteristic

- Start by entering the total number of people in your workforce into cell B4. Here 'workforce' means all staff, including executives.
- Then populate the highlighted cells in column B 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 the total number of people within your workforce (which you entered at the top of the page in cell B4). If they do not match, the total will read 'Error'.
- If you do not collect data on a characteristic, please tick the box next to "Do not collect ... data", which is situated above each question. This is a new functionality for the 2026 EDI Data Tool to distinguish between where data on a characteristic has not been collected and where the data is collected but is missing for some employees. If you tick the box to say you do not collect that data, then any data you do enter for that characteristic will be ignored (including in the 'Customer to workforce' tab when you choose to compare your customers with your workforce).
- If you do collect the data, but do not have data for all employees, please use the "Don't know" response option to record the number of employees for which you do not have data on this characteristic.
- The 'Prefer not to say' option should be used where you have included a 'Prefer not to say' response option in your data collection.

## 3. Executive to staff

- Staff numbers and percentages should have automatically populated from the figures you provided in 'Workforce by characteristic'. Once you have entered your executive numbers, staff numbers will be calculated as your workforce numbers minus your executive numbers.
- Again, start by entering the total number of executive staff in cell E4. 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).<sup>2</sup>

- Populate the highlighted cells in column E with the number of your executive staff who have each characteristic. Once you have populated this, the executive percentages and executive to staff comparison should calculate automatically.
- Again, if you do not collect data from your executive team on a characteristic, please tick the box next to “Do not collect ... data”.

#### **4. Board to staff**

- Staff percentages (excluding executives) should populate automatically from the figures provided in ‘Workforce by characteristic’.
- Start by entering the total number of people on your board in cell E4. We suggest including all board members who have voting rights. This includes any executive directors who sit on your board.
- Then populate the highlighted cells in column E 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.
- If you do not collect data from your executive team on a characteristic, please tick the box next to “Do not collect ... data”.

#### **5. Customer to workforce**

- In cell E2, select whether you would like to compare your customer characteristics with your workforce or with the wider population.
- The columns for workforce number and workforce or population percentages should populate automatically.
- Enter your total number of customers in cell E4. (If you only collect data for a representative sample of customers, please enter the total number of customers in the sample instead)

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<sup>2</sup> 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 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.

- 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 (or the number in your representative sample).

## 6. Tables and Charts tab

- This tab does not require your input and is for you to use as you wish by copying the tables and charts into your own reporting.
- The sheet is locked to prevent any changes affecting the functionality of the tool.
- However, the charts themselves are unlocked so that you can make changes to the formatting.
- You can also edit the population groups displayed in the charts, for example, if data is missing for one group. Go to 'Select Data' in 'Chart Design' and untick the relevant group (e.g. Board).

For the data collection exercise, as a minimum, we would like you to complete as many characteristics as possible for 'workforce by characteristic'. We would also like you to complete as many characteristics as possible for 'executive to staff' and 'board to staff'. These are important to complete as these show diversity within key decision makers in the sector.

If we receive enough data on residents, we will also use this within our sector-wide report to compare the characteristics of the housing association sector's workforce with those of its residents.

If you don't hold data on certain characteristics, be sure to check the box for "Do not collect... data" rather than leave blank.

**Please save your Excel file with your organisation's name and send your completed tool to [equality.diversity@housing.org.uk](mailto:equality.diversity@housing.org.uk) by 15 May 2026.**

If you have any questions or feedback about the tool, please contact Katie Miller, Research Lead at [research@housing.org.uk](mailto:research@housing.org.uk).