
NOVEMBER 2020
ANNUAL REVIEW



MCKENZIE-DELIS PACKER REVIEW

In Association with Ipsos MORI



DIALGLOBAL™
DIVERSE | INCLUSIVE | ASPIRATIONAL | LEADERS





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PACKER REVIEW**

NOVEMBER 2020 ANNUAL REVIEW

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MESSAGE FROM EY



ZAHEER AHMAD MBE JP

**HEAD OF STRATEGIC DELIVERY,
DIVERSITY & INCLUSIVENESS AT EY**

We are pleased to be the principal sponsor of the McKenzie-Delis Packer Review. This ground breaking review on Diversity and Inclusion (D&I) in the UK workplace. It is a first comprehensive nationwide review across multiple facets of workplace diversity and inclusion.

It's been a difficult and painful year for many communities, Covid-19 and the Black Lives Matter movement brought to the surface deeply embedded systemic inequalities. There must now be a concerted and coordinated effort to root out all forms of inequalities and accelerate the pace of D&I. We should not shy away from taking bold and brave actions to advance D&I and our pursuit for equality must be relentless.

The recommendations in the report from the review committee members sets out an in depth and holistic summary of how organisations can

move the dial on D&I. These forward thinking recommendations are crucial to accelerating the pace of change as the modern world of business and the society demands a more diverse and inclusive Boards.

At EY our mission is to be recognised as the most diverse and inclusive employer in our industry, with our clients, in our markets and with our people and to achieve this we have radically accelerated our progress on D&I, by creating a culture where everyone belongs and significantly shifting the gender & black and ethnic minority make-up of our partnership by 2025.

We are proud of our partnership with McKenzie-Delis Packer Review and encourage everyone to implement the recommendations outlined in this review.



FOREWORD



LORD SIMON WOOLLEY

CHAIR OF THE MCKENZIE-DELIS
PACKER REVIEW

I have worked nearly 30 years fighting, campaigning and lobbying for greater social and racial justice. In all this time, I have never known a greater appetite for equality, and particularly for race equality. This double pandemic, including COVID-19 and the death of George Floyd, has become a perfect storm that has laid bare the societal inequalities that exist. As a result, and at a scale I have never seen before, many white people have glimpsed the world through a black life's lens and thought, "wow, police brutality is unlikely to happen to me whether I am in the UK or the USA". With plenty of youth marching on the streets and demanding change, company CEOs began internal conversations about equality and race. People began to share, vent, and often cry at being able to talk about moments and feelings that British people simply do not do, especially if you are not white.

We wanted to be a part of that broader conversation. We wanted to seize the moment of honesty and reflection. We are acutely aware that the better the understanding of who we are, and where we are in the D&I space, the better we are placed to make bold and brave plans. These plans will not only be transformative for our individual companies and Britain, but also for a flourishing dynamic society – one that embraces diversity and is comfortable with itself.

These are big goals, and they are Dr. Martin Luther King sized dreams. As an activist, I am not afraid. In fact, I relish it. Above all, I am acutely aware that my hero Dr. King had more than a dream, he had a plan. We hope the McKenzie-Delis Packer Review encourages you to have big dreams but above all, a big plan to ensure our teeming diversity can flourish.



BEN PAGE

CO-CHAIR OF THE MCKENZIE-DELIS
PACKER REVIEW

It has been the year of the pandemic, the year of Zoom, and also the year of Black Lives Matter. Virtually every major employer I have spoken to in 2020 has spoken about the internal impact the murder of George Floyd and accompanying demonstrations had on internal discussions about D&I.

UK businesses and public bodies have been working on statutory gender pay gap reporting for some time, and there has been a huge rise in employer engagement with some facets of D&I, which includes mental health, disability and gender equality in recent years. The McKenzie-Delis Packer Review provides a snapshot of where our participating organisations are on these facets plus exploring other areas which should be considered in the context of holistic D&I. If we had asked these questions a decade ago the picture would have been very different. In another decade, the picture will once again be different.

This year has made clear in my organisation, and I think many others, that many of these issues are the focus of sharp generational divides. In the UK in 2020, your views on issues of diversity and indeed politics often align more on your age than your social class. Ipsos MORI found the biggest ever age gradient in voting in the December 2019

Election, with the young choosing Labour and the majority of the over 45's Conservative. Something similar is present in views on diversity – the young are relaxed about gay marriage, the old less so. Some nine out of ten people my age describe themselves as completely heterosexual (88% among Baby Boomers born between 1945-65) whereas for Gen Z (born 1995 onwards) the figure is only 66%.

This generational divide, if it is sustained – and we have no reason to think it will not be, will mean that the aspects of diversity we are focussing on in this report will continue to rise in prominence. Alongside this, the general global trend is slowly improving equality, and more liberal attitudes on race, homosexuality, disability, mental health and more. While there are reversals, the long-term global trend is unmistakable. This review is a useful reminder of the direction of travel, and a way for companies who find themselves in the minority to focus on what they can do to make progress, and remain open and attractive to the full diversity of talent – rather than a limited part of it. We will keep asking the questions every year and report back.



PREFACE



The McKenzie-Delis Packer Review

IS AN **AMAZING EXAMPLE**

of what can happen when we harness the power of diversity and inclusion.



LEILA MCKENZIE-DELIS

FOUNDER & CEO OF DIAL GLOBAL,
FOUNDER OF THE MCKENZIE-DELIS
PACKER REVIEW

The UK is a rich assortment of talent. Each and every one of us has diverse idiosyncrasies that make us unique. To me, this means that the D&I agenda of this country belongs to all of us. It is a holistic, intrinsic, and collective responsibility that we all share to drive equality and shine a light on ours and others' individuality.

The McKenzie-Delis Packer Review came from the essence and ethos of DIAL Global (Diverse, Inclusive, Aspirational, Leaders), which fosters an unwavering passion to include all, and to consider all the segments of diversity that harness the power of intersectionality beyond only skin level. "Moving the dial" is a passion that has turned into obsession and furthermore been the inspiration for this inaugural report.

The McKenzie-Delis Packer Review looks at the entire eclectic mix of diversity that deserves to be recognised and explored. This encompasses race and ethnicity, age, gender, sexual orientation,

mental health, disability, socioeconomic background, nationality, religion, and parenthood. By factoring in ten facets of D&I, this Review represents a significant step forward in how D&I is debated and considered and provides a view into where we are, and what more we need to do.

The McKenzie-Delis Packer Review is an amazing example of what can happen when we harness the power of D&I. By involving students and sponsors, and the organisations taking part we believe we have contributed to the progression of how we talk about the D&I landscape. This review calls on organisations and world leaders to step up today, recognise the importance of D&I and take action to better our workplaces.

Leila McKenzie-Delis
FOUNDER & CEO



THE MCKENZIE-DELIS
PACKER REVIEW

ABOUT THIS REPORT

The aim of this report is to create an industry standard diagnostic and meaningful report on the many aspects of both visible and invisible diversity.

GOALS



The vast majority of leaders do now understand that unless they embrace and foster the building of teams that reflect the diversity of their customers and often society as a whole, they will seriously limit the effectiveness, sustainability and success of their organisation. They then need to ensure that their culture is one of inclusiveness. There's No point in building a diverse team if you aren't going to include everyone.

The difficult bit for many leaders is how to face their own unconscious bias, to identify the specific issues in their organisation, and once they do, where to get started in tackling them.

Organisations can use this report to start the conversation with colleagues. It really does help a leader focus on the areas that their organisation may be unconsciously falling down on. The report will help them identify the priorities and then build the case for change. There are numerous sources of material, many of which provide proactive and pragmatic activities and measures of progress.

All you need to get started is commitment to make your organisation a place where Diversity and Inclusion thrive.

DEBBIE HEWITT MBE, REVIEW COMMITTEE MEMBER, PLURAL NON-EXECUTIVE CHAIRMAN AT VISA EUROPE, BGL GROUP, WHITE STUFF, RESTAURANT GROUP

INCLUDED:

- ✓ Curate a blueprint survey that recognised ten aspects of diversity, inclusion and belonging relating to both visible and invisible diversity.
- ✓ Enlist a diverse and inclusive Review Committee from different sectors and backgrounds and chaired by industry leaders.
- ✓ Partner with renowned subject matter experts to develop thought leadership and up to date expertise on each of the ten facets of the "dial", co-create questions for the survey. Ensure that we did not "recreate the wheel" with questioning; ensuring all ten facets were as collaborative and intersectional as possible.
- ✓ Collaborate with leading institutions, research and charity partners including but not limited to: UN Global Compact Network UK, upReach, Stonewall, The Centre for Ageing Better, The Hampton Alexander Review, The Parker Review, Mind, Minds at Work and The Power of the Parent with the goal being to glean expert advice and support co-creation of the survey.
- ✓ Draw upon all research and strategic partners in addition to the McKenzie-Delis Packer Review Committee to produce collaborative and inclusive recommendations.
- ✓ Name and recognise the top 25 organisations who took part and who have ranked as top holistic performers in all the ten facets.
- ✓ Utilise shared knowledge and efforts to promote best practice.
- ✓ Promote as widely as possible through both involved organisations and the media in order to gain as much traction as possible.



Selection of facets

The ten facets considered in this Review were selected through consultation with D&I specialists and members of the DIAL Global network of business leaders. The final selection led to the prioritisation of ten distinct aspects of D&I - Ethnicity, Gender, Age, Nationality, Mental Health, Sexual Orientation, Socioeconomic Status, Disability, Religion, and Parenthood. These ten facets are considered by the network to be key areas of attention for organisations dedicated to improving workplace D&I.

UN Global Compact Network UK Collaboration

The review collaborated with the UN Global Compact Network UK to establish social and business relevance. We conducted a mapping exercise, exploring the link between each of the facets and the United Nations Sustainable Development Goals (SDGs). The SDGs constitute an ambitious blueprint to achieve a better and more sustainable future for all, and call on all of society to pool creativity, knowhow, technology, and financial resources to achieve the SDGs in every context.

All ten facets - Ethnicity, Gender, Age, Nationality, Mental Health, Sexual Orientation, Socioeconomic Status, Disability, Religion, and Parenthood — were found to be linked to SDG 8 (Decent Work and Economic Growth) and SDG 10 (Reduced Inequalities). SDG 8 promotes “sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all”, while SDG 10 aims to “reduce inequality within and among countries”. In addition to SDG 8 and SDG 10, certain facets also connect to SDG 3 (Good Health and Well-being), SDG 4 (Quality Education) and SDG 5 (Gender Equality), as recognised throughout this review.

Survey question creation

To ensure that the questions in the review adequately reflect the perspectives of marginalised groups, and address aspects of each facet where organisations can influence change, we initiated formal collaborations with expert research partners, to develop the questions related to each facet. The survey questions were then co-created through

consultation with these research partners, which included the following organisations: The Hampton-Alexander Review, Stonewall, The Parker Review, upReach, The Centre for Ageing Better, The Business Disability Forum, Global Futures, Mind, Minds at Work and Power to the Parent.

Literature review

The purpose of our literature review is to gain an understanding of the research and data gathered and to provide useful thought leadership and debate around the ten facets of diversity, inclusion and belonging. The literature review is relevant to the insight gathered from the current environment and helpful in presenting unbiased views and methodologies related to these ten facets.

Some of the information in the forthcoming sections is deliberately thought provoking as we drew from many diverse areas of expertise and wanted to give an opportunity to the students involved in this project to have their voices heard and to build their knowledge in the broader field of diversity, inclusiveness and belonging. The review features quotes, case studies, current practices and metrics relevant to the aims set out in this report.

Recommendations

At the end of each facet section, we have collated best practice actions from our participating organisations, research partners and our review committee on how organisations can continue to move the dial on D&I.

Note on the data collection methodology

Data for the McKenzie-Delis Packer Review was obtained through an online survey sent by Ipsos MORI to UK Employers from the private and public sectors including the FTSE 500, all NHS Foundation Trusts and public sector departments and other private companies. An invitation to participate was sent to Chief Executives, Company Secretaries, HR Directors and Diversity & Inclusion Leads. Organisations received an information sheet detailing how their data would be used and consented to these terms upon participation. Data was collected between

June 2020 and October 2020. Seventy-nine organisations participated in total. Of the participating organisations: 44 are in the FTSE 500, 23 are NHS Foundation Trusts, 2 are Public Sector Departments and 11 other Private Sector. A list of the organisations that consented to the name of their organisation being published in this report as having participated, is included in the Appendix.

Results from the survey are presented unweighted and should be treated as indicative and not statistically robust. For example, the 44 FTSE 500 companies who took part, if examined alone, will have a margin of error of as much as +/-11-20% depending on the percentage result being considered. The sample by definition is skewed towards larger employers and the NHS, and therefore is not representative of UK employers as a whole. The overall profile of responses on different dimensions of diversity is however worthy of reflection, with these provisos.

Definition of Leadership Team

Several questions in the survey asked about the Leadership Team of an organisation. The Leadership Team was defined in the survey as follows: Members of the Executive Committee and those senior leaders who are Direct Reports to Executive Committee members. Sometimes it’s referred to as the ‘C-suite plus one’. The Executive Committee are responsible for managing and running a company. It typically comprises the Chief Executive, Chief Financial Officer and leaders of other key functions — including Legal and Operations. The Executive Committees Direct Reports are those individuals that report directly to the Chief Executive, CFO and other functions day to day. The source of this definition is the Hampton-Alexander Review.

Use of the term BAME (Black, Asian and Minority Ethnic)

The term BAME was used in the survey, and is used in this report, as it is a recognised term in the workplace, and as such, is commonly used by companies in data reporting. The difficulties of using this terminology are recognised, as it can mask significant differences between representation of different ethnicities.

Note from the editor

This review is made up of primary and secondary research and also drew on the personal experiences and opinions of many experts and leaders in the field. While it was important for us to represent the research and data in a factual, unbiased manner, we also wanted to ensure that our many contributors had the opportunity to candidly express their thoughts and opinions about the research and what is needed to make progress in diversity moving forward. While it may not be traditional to include emotional, personal opinions in these types of reports, we decided to break with convention on this important topic.





EXECUTIVE SUMMARY

THE MCKENZIE-DELIS
PACKER REVIEW

The McKenzie-Delis Packer Review provides an evaluation and analysis of a D&I survey completed with self-selecting UK organisations looking specifically at ten facets of diversity.

This encompasses race and ethnicity, age, gender, sexual orientation, mental health, disability, socioeconomic background, nationality, religion, and parenthood.

The review was commissioned to broaden the awareness and understanding of visible and invisible segments of diversity and better understand how organisations are reporting, measuring and taking action to become more inclusive and diverse employers. For the facets of gender, ethnicity and sexual orientation, research partners chose questions which focus on Leadership Teams. For the facets of disability, age, religion, nationality, socio-economic background, mental health and parenthood, the questions ask more broadly about workforce policies and initiatives.

Going forward, we hope that the McKenzie-Delis Packer Review becomes a useful diagnostic tool to help organisations assess their position on each of the facets and identify what their areas of focus should be, as well as measure and report progress on all ten facets.

What the results from this survey indicate is that there are areas of strength on each of the individual facets as well as

areas where more attention could be focussed to move the dial on the particular facet. What each organisation focuses on will depend on their strategic areas of priority and where they are on their D&I journey.

At the end of each of the following sections, dedicated to each facet, specific recommendations for action and initiatives are given based on the expertise of the research partners and review committee.

Firstly, we recommend you consider your organisation's areas of priority and ask do we have these activities in place, and if not, would focusing on them help us 'move the dial'? Secondly, consider the aspects of D&I you may not have focused on before and start the conversation with your leaders and employees. Are these areas where we need to take more action? If so, then what?

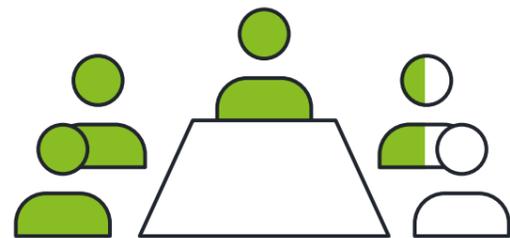
On this basis, the McKenzie-Delis Packer Review will achieve its aim of creating a holistic solution and the standard for the future. A future where companies recognise, report and progress the many different aspects of D&I.



KEY FINDINGS FROM PARTICIPATING ORGANISATIONS ARE:

01

GENDER



Seven in ten (71%)

of participating organisations report progress against measurable objectives for Leadership Team gender diversity, yet only half (54%) specify gender diversity in Leadership Team succession planning.

02

RACE AND ETHNICITY

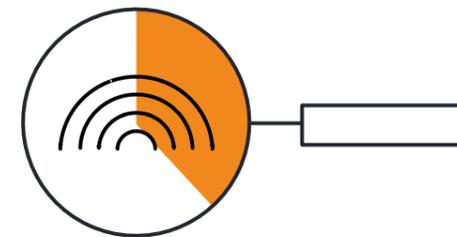


Of participating organisations, **just over four in ten (43%)**

report their progress against measurable objectives for Leadership Team ethnic diversity. Over half (56%) have initiatives for increasing ethnic diversity in their Leadership Teams and half (49%) specify ethnic diversity in Leadership Team succession planning.

03

SEXUAL ORIENTATION



Just under **four in ten (38%)**

of participating organisations gather and monitor data on the sexual orientation of their Leadership Teams or internally share stories of any visible LGBT role models from the Leadership Team.

04

DISABILITY



Nine in ten (91%)

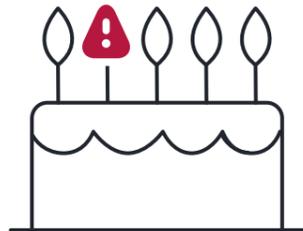
of participating organisations have a process to ensure employees with disabilities and long-term conditions have the adjustments they require at work. However, only 58% of participating organisations have communicated and engaged with the workforce on why disability inclusion is important to the organisation and 43% do not currently have senior leaders in each area of the organisation, ensuring disability inclusion is factored into their business strategy.



KEY FINDINGS FROM PARTICIPATING ORGANISATIONS ARE:

05

AGE AND GENERATION



Fewer than **one in five (15%)**

of participating organisations agree they faced issues with managing age-diversity at work, or challenges with the retention and promotion of older workers.

06

RELIGION OR BELIEF

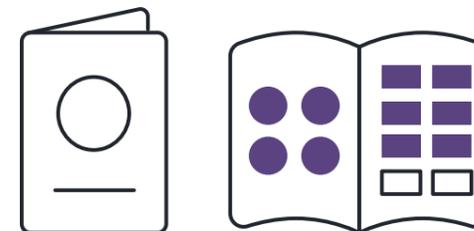


87%

of participating organisations recognise the benefits of a diverse workforce that includes a wide range of religions or beliefs. The results show that the majority of the organisations allow for some religious accommodations in the workplace, for example, 75% of organisations surveyed provide a dedicated space or prayer room for employees. Just over half of organisations permit employees to establish religion or belief networks.

07

NATIONALITY

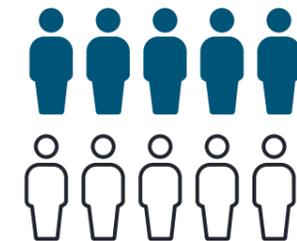


Nearly **eight in ten (77%)**

of participating organisations collect data on the nationality of employees. However, some 18% – almost one in five – do not.

08

SOCIOECONOMIC STATUS



Half (49%)

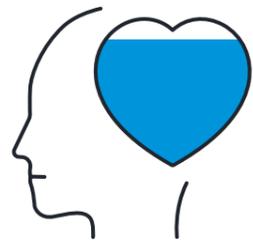
of participating organisations actively promote entry-level roles to young people from under-represented backgrounds, yet just one in five (19%) currently use contextual recruitment practices to support applicants from underperforming schools and less advantaged backgrounds. Only 11% of participating organisations collect and monitor data on socioeconomic background.



KEY FINDINGS FROM PARTICIPATING ORGANISATIONS ARE:

09

MENTAL HEALTH



In the area of mental health,

nine in ten (92%)

of participating organisations recognise the importance of employee mental health in business success. Eight in ten participating organisations (81%) agree that they have a strong mental health strategy/plan for all employees which includes tackling stigma, and nearly nine in ten (87%) provide mental health training.

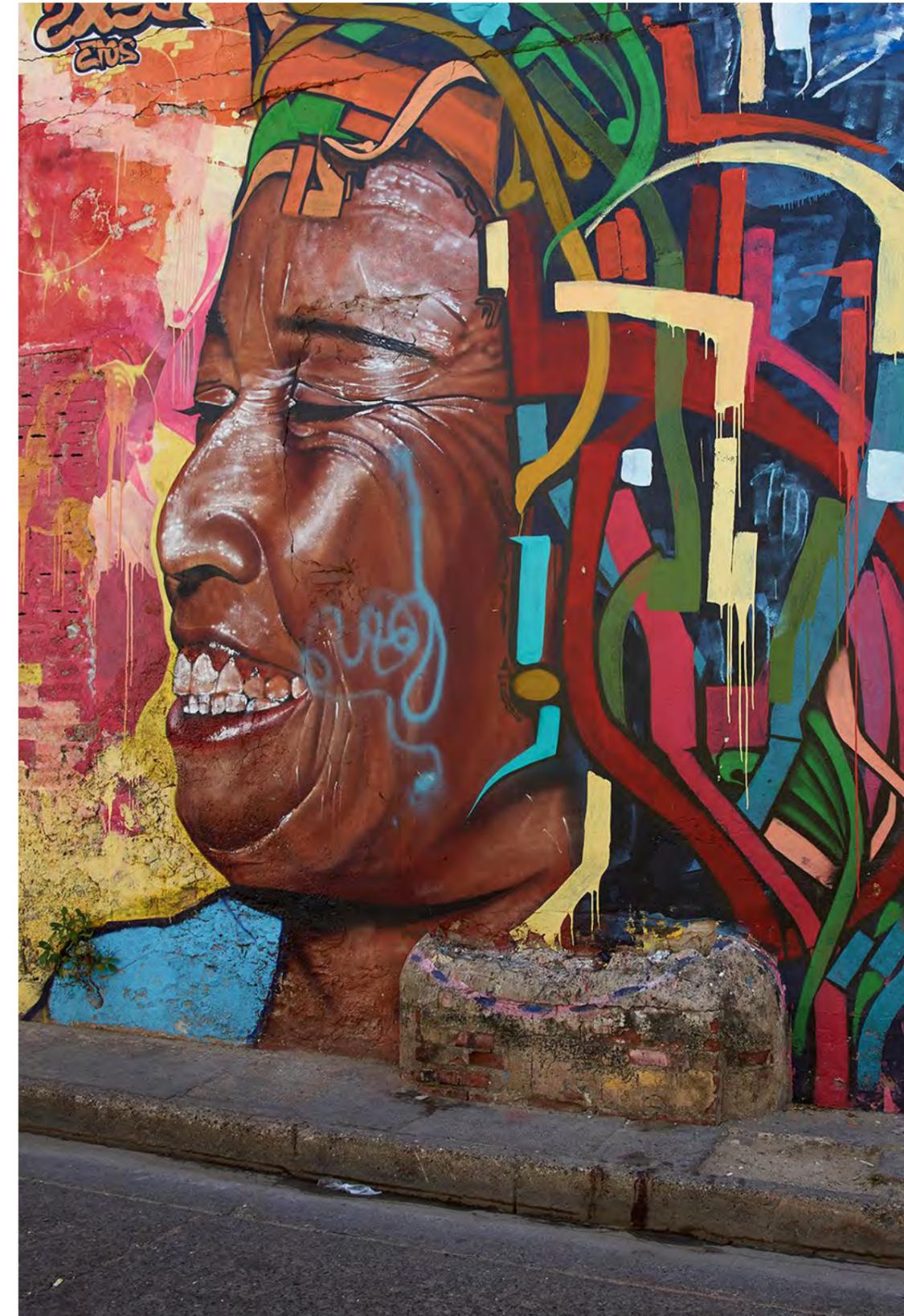
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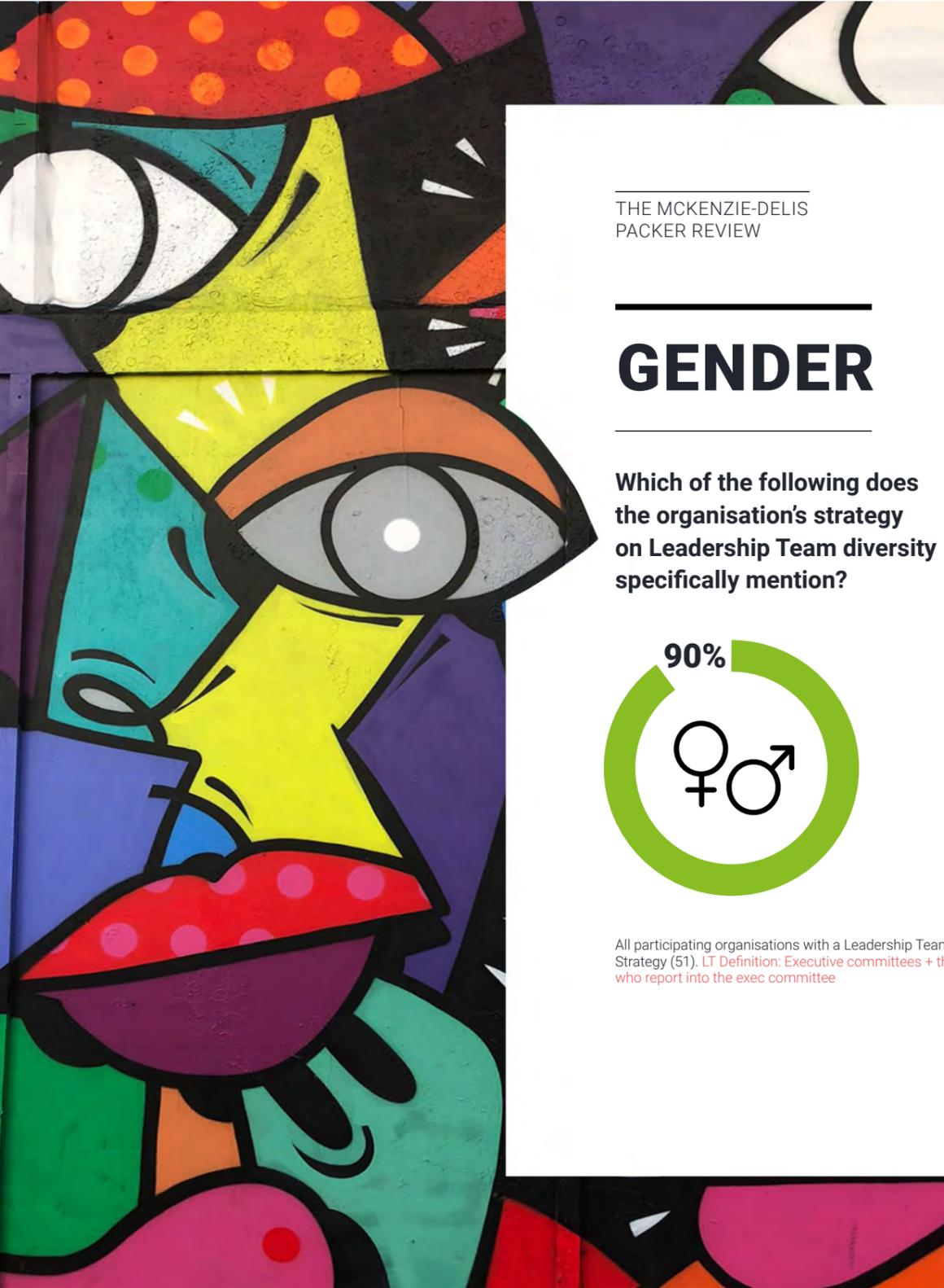
PARENTHOOD



92%

of participating organisations recognise the benefits of having parents in the workplace. Yet there is a gender gap around parental support. Seven in ten (74%) of participating organisations offer an uplift in statutory maternity pay, while only six in ten offer an uplift in statutory paternity pay.

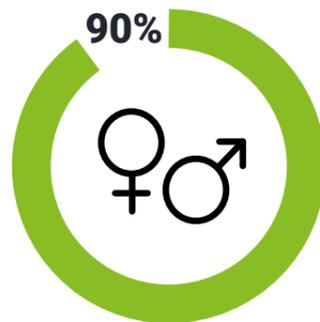




THE MCKENZIE-DELIS PACKER REVIEW

GENDER

Which of the following does the organisation's strategy on Leadership Team diversity specifically mention?



All participating organisations with a Leadership Team Diversity Strategy (51). LT Definition: Executive committees + the leaders who report into the exec committee

The positive correlation between a diverse workforce and financial performance is well-established.¹ Those organisations with the highest gender diversity at the executive-level, in particular, exhibit the most pronounced levels of outperformance. In 2019, top-quartile businesses, with regards to gender diversity of board members, enjoyed a 25% greater likelihood of outperforming their peers in the fourth-quartile, in terms of earnings before interest and tax.² These results reflect a growing disparity between more and less gender diverse companies, with this outperformance up from 21% in 2017 and 15% in 2014.¹ This data suggests there are financial performance benefits of including women at the top-end of the corporate ladder to influence the most significant strategic and operational decisions.

The glass ceiling and pay disparity

To address the “glass ceiling” preventing women achieving senior leadership roles, businesses must address inequality throughout the career progression pipeline. The biggest obstacle women face to achieving executive-level status is in the initial step up to manager; in 2019, for every 100 men promoted or hired to a managerial position, there were only 72 women promoted or hired. In addition when looking at increasingly senior managerial positions, as the ratio of men to women increases, the likelihood of women being promoted decreases.³ This underrepresentation of women in managerial roles contributes significantly to the gender pay gap, which is particularly pronounced in older age groups, and is more than 15% amongst those over 50.⁴ It is therefore critical to confront early-career gender promotion inequality to ensure long-term parity across all rungs of the ladder.

Tracking progress in representation

The objectives for 33% board-level inclusion set by the 2016 Hampton-Alexander Review are unlikely to be met by their 2020 target, especially given the deceleration in the rate of improvement in recent years.^{5,6} Moreover, the gender pay gap amongst full-time employees stands at 8.9%, down only 0.6% points on 2012.⁴

While overall employee sentiment on progress in gender representation is 52% positive, only 29% of employees view progress on gender inclusion positively.² This highlights the challenge faced by even the most gender diverse companies; simply hiring a more diverse range of talent is not progress if their experiences in the workplace mean they do not have an equal seat at the table. For businesses to reap the

rewards of a diverse workforce, it is essential that they cultivate an environment that promotes inclusive leadership, accountability amongst managers and fairness of opportunity.

Gender equality in the future

The ongoing COVID-19 pandemic and the consequential economic fallout is likely to further slow or even reverse progress made on gender equality, with women's job security 1.8 times more precarious than men's. Disproportionate female job losses would not only impact gender equality targets but the global economy, with GDP growth forecast to be \$1 trillion lower in 2030 than if women's unemployment corresponded equivalently to that of men.⁷ Therefore businesses must continue to strive for gender parity in the workplace both to stimulate economic development and improve the social and economic wellbeing for women globally.



More focus on gender in succession planning is needed to create a pipeline of

TALENT

SUZIE WELCH, REVIEW COMMITTEE MEMBER, GROUP CHIEF PEOPLE OFFICER AT ODEON CINEMAS

1. Delivering Through Diversity, McKinsey & Company, 2018
2. Diversity Wins: How Inclusion Matters, McKinsey & Company, 2020
3. Women In The Workplace, McKinsey & Company, 2019
4. Gender Pay Gap In The UK - Office For National Statistics, 2019
5. FTSE Women Leaders: Hampton-Alexander Review, 2019
6. COVID-19 And Gender Equality: Countering The Regressive Effects, McKinsey & Company, 2020



RESEARCH PARTNER

Hampton-Alexander Review

The Hampton-Alexander Review is an independent review body, dedicated to increasing female representation on UK boards and in senior leadership positions.



GENDER KEY FINDINGS



90% of participating organisations with a clear strategy on Leadership Team diversity report that this strategy specifically mentions gender. This is the highest score of the ten facets.



Seven in ten (71%) of participating organisations report progress against measurable objectives for Leadership Team gender diversity across time reflecting the focus on gender representation at senior levels in recent years and the targets set by the Hampton-Alexander Review.



While seven in ten are reporting progress, this falls to around **six in ten** for having stated initiatives for increasing gender diversity within the Leadership Team (61%). It is worth noting there is a difference between participating FTSE 500 companies and participating NHS Foundation Trusts here, with the FTSE 500 more likely to have stated initiatives for increasing gender diversity in the Leadership Team. (33 / 44 FTSE 500 answered yes to this question vs. 6 / 23 NHS Foundation Trusts).



When it comes to specific actions/initiatives organisations can take, **just under six in ten** of participating organisations have a member of the Leadership Team act as an executive sponsor or formal senior champion for a gender focussed employee network (58%) and just over half (54%) specify gender diversity in leadership succession planning.



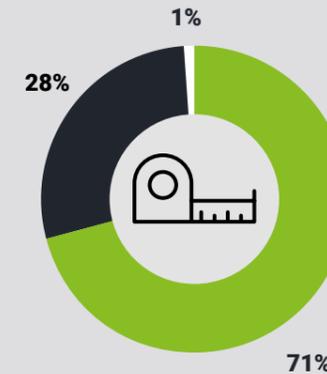
GENDER KEY RESULTS

Does the organisation:

01

Report progress against measurable objectives for Leadership Team gender diversity over time?

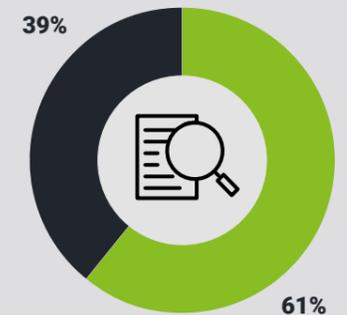
Source Q3.1
Base: All Participants (79)
LT Definition: Executive committees + the leaders who report into the exec committee



03

Have stated initiatives for increasing gender diversity within the Leadership Team?

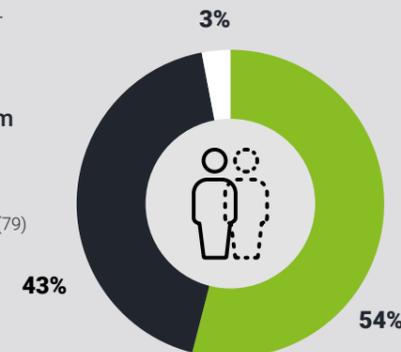
Source Q3.1
Base: All Participants (79)



02

Specify gender diversity in Leadership Team succession planning?

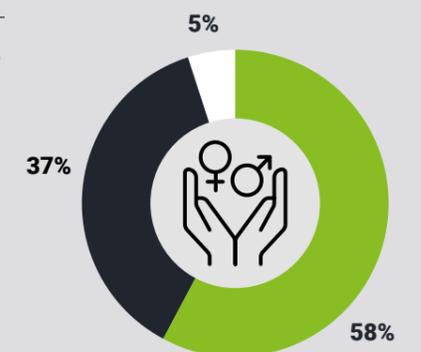
Source Q3.1
Base: All Participants (79)



04

Have a member of your senior Leadership Team act as an executive sponsor or formal senior champion for a gender focussed employee network?

Source Q3.1
Base: All Participants (79)



Yes No Don't know



RECOMMENDATIONS



Organisations have to address the lack of promotional opportunities for women by scrutinising their processes for development and

GENUINELY REMOVING BARRIERS

HELEN WEBB, REVIEW COMMITTEE MEMBER AND CHIEF PEOPLE & SERVICES OFFICER OF CO-OP

GENDER

01

COMPLETE A DIAGNOSTIC REVIEW – ANALYSE YOUR DATA

Take action based on real, measured facts rather than ‘common sense’ or opinion. Bring the same standards of informed decision-making used throughout management to the business of D&I. A full analysis can help your organisation understand where you may have equity issues and provide a data-based foundation in order to set goals and where to focus initiatives related to diversity, equity and inclusion.

02

OPEN A DIALOGUE

It is vital to foster an inclusive culture and create safe spaces for employees so that all genders can share their thoughts without fear of judgement. Establishing employee groups on gender can create places where all genders can open up about sensitive topics. Gaining true insight ultimately lies in leading with mutual respect, inclusivity, and establishing a space that is safe enough for people to speak their minds.

03

SET THE TONE FROM THE TOP

Every organisation benefits from greater gender equality. Ensure senior leaders speak of the importance of gender equality in your organisation by having them share personal stories and asking others about theirs. Many people need support in understanding what forms inequality or discrimination may take in modern day society and therefore how to proactively respond to it. Urge leaders to ensure there is gender balance in meetings.

04

HOLD YOURSELF AND OTHERS ACCOUNTABLE

Parity needs planning. D&I goals are only realised when key decision-makers are accountable. Establishing realistic, achievable and relevant goals tied to accountability serves to drive change and results. Apply a gender lens to recruitment, retention and succession planning to foster the progression of all genders across the organisation. Set targets or goals to increase the representation of women throughout the pipeline.

05

TAKE A HARD LOOK AT YOUR CULTURE

Ensure your organisation is looking at gender diversity and gender inclusion – as they aren’t the same. Simply raising the number of women that you employ, and ticking off that box, doesn’t guarantee that you’ve built a work environment of equal opportunities. Is your organisation’s culture gender-inclusive or does it make some people in the room feel that they don’t belong there? Organisations can also revisit and improve their procedures including flexible working, parental leave, job sharing and many more.



THE MCKENZIE-DELIS
PACKER REVIEW



CASE STUDY

BIFFA

**Biffa's 8,000+ team
operates waste services
across the UK.**

Our D&I strategy is underpinned by our values and is key to our desire to look after our people and provide an environment where all our colleagues can thrive.

At Biffa we're taking a holistic approach to D&I through acknowledging and celebrating the fact that we are all different, which will help to create an inclusive culture and in turn attract and retain diverse employees.

We believe it's our differences that make us stronger as an organisation. We've focused on inclusive leadership, understanding unconscious bias and micro behaviours and the impact they can have.

Participation in National Inclusion Week 2020 was pivotal to our D&I agenda, raising awareness of and demonstrating our commitment to D&I, launching our 'I AM' campaign and encouraging colleagues to become inclusion allies.

We aspire to greater gender and ethnic diversity, especially at senior levels, therefore we've established Employee Resource Groups to help us understand and remove any barriers.

We're setting inclusion objectives to drive accountability and instil inclusive mindsets and plan to deliver D&I training to front-line employees during 2021.



Organisations have to address the lack of promotional opportunities for women by scrutinising their processes for development and genuinely removing barriers. The only way to do this is by asking women themselves what change is required and create safe environments in which to have these conversations; they need to actively listen and respond to what is needed to deliver real impact and sustainable change.

HELEN WEBB, REVIEW COMMITTEE MEMBER AND CHIEF PEOPLE & SERVICES OFFICER OF CO-OP



The review showcases some clear areas of strength, such as gender, where 90% of participating organisations with a

CLEAR STRATEGY

on leadership team diversity report that this strategy specifically mentions gender. This is the highest score of the ten facets and notes a marked positive trend in increased representation.

EDLEEN JOHN FCIPD, REVIEW COMMITTEE MEMBER, INTERNATIONAL RELATIONS, CORPORATE AFFAIRS AND CO-PARTNER FOR EQUALITY, DIVERSITY AND INCLUSION DIRECTOR AT THE FA



There has been a clear focus on gender for a number of years and this is evident in the results. It is worth noting that more focus on

GENDER

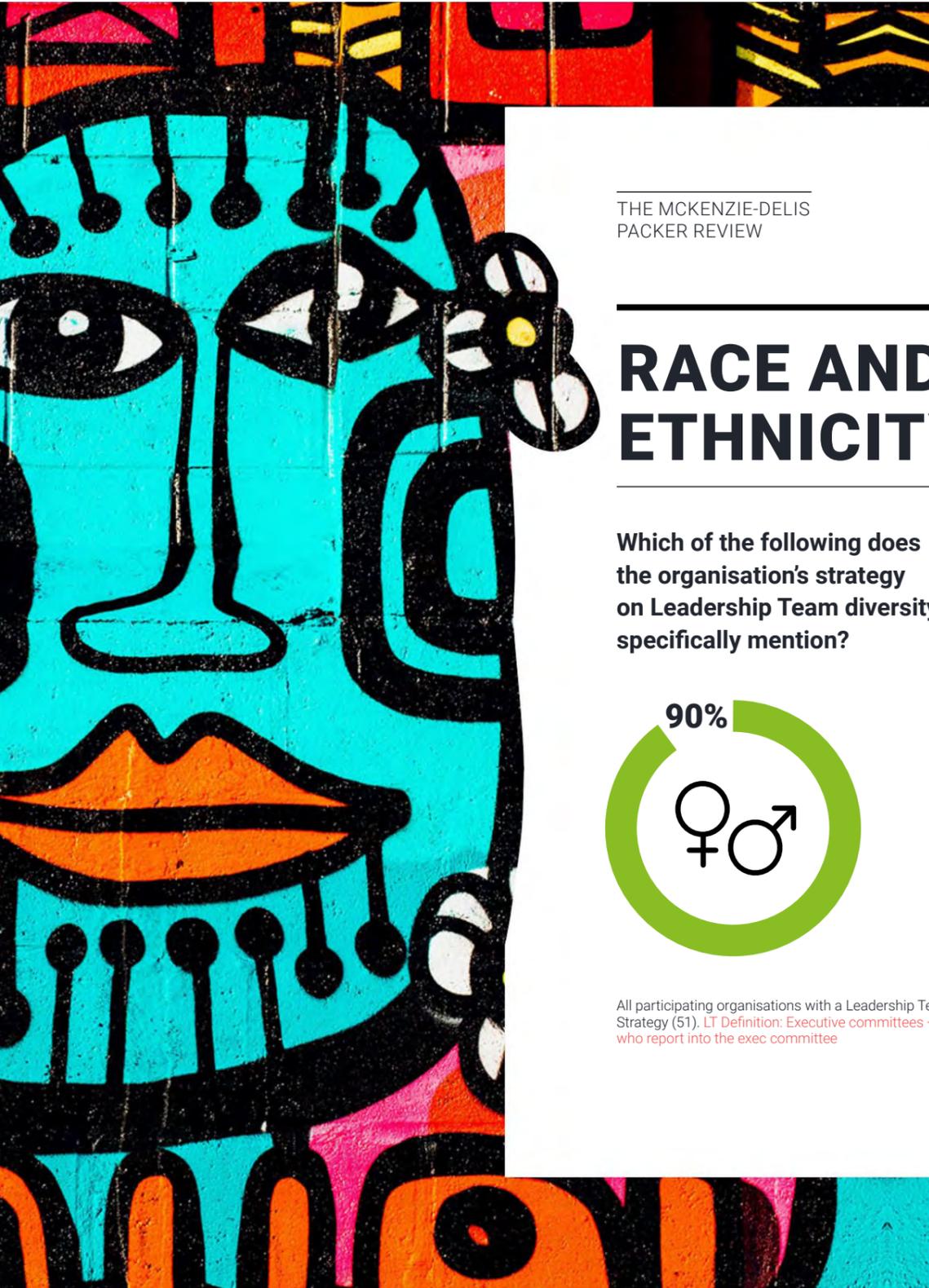
in succession planning is needed to create a pipeline of talent as well as ensuring ongoing plans are in place to sustain balance in the future.

SUZIE WELCH, REVIEW COMMITTEE MEMBER, GROUP CHIEF PEOPLE OFFICER AT ODEON CINEMAS



The business case for gender diverse Boards is well known and compelling. While the challenge of inequality at managerial levels is well appreciated and understood, in that it thwarts the pipeline to Board level, we have made slow progress in improving it via the actions that we know work, including ensuring gender diverse succession planning. Most concerning is the potential impact in a post COVID-19 world that the lack of progress here could be exacerbated.

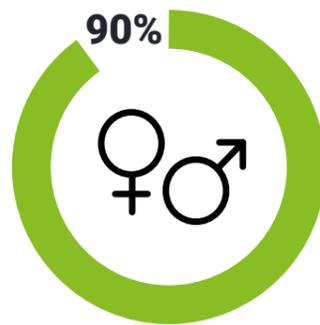
KARI DANIELS, REVIEW COMMITTEE MEMBER, CHIEF EXECUTIVE OFFICER OF TESCO IRELAND



THE MCKENZIE-DELIS PACKER REVIEW

RACE AND ETHNICITY

Which of the following does the organisation's strategy on Leadership Team diversity specifically mention?



All participating organisations with a Leadership Team Diversity Strategy (51). LT Definition: Executive committees + the leaders who report into the exec committee

While a wide ranging body of research exists which supports the business case for having an ethnically diverse and inclusive workforce, representation of race and ethnic (R&E) minorities in the top leadership levels of UK organisations continues to remain low, with slow and inconsistent progress towards fair representation.

The talent bias

The scale of untapped R&E minority talent in the UK underlines the structural biases faced by ethnic minorities in the workplace. Approximately 14% of the working age population are an R&E minority and by 2030 this number is expected to rise to almost 20%,¹ however, only 10% of R&E minorities are employed.² Compared to employees with a white British background, R&E minorities are significantly more likely to claim that discrimination is a problem and that this influences the opportunities they are given at work.¹ Despite being more likely to be overqualified than white employees, such biases can result in R&E minorities being concentrated in lower paying jobs and being more underemployed and underpromoted.²

R&E diversity in the workforce varies across services, industries and geographies of the UK, but a common theme is the lack of ethnic representation at higher leadership ranks and on boards. In 2018, 10% of public appointees* in post (where declared) identified as an R&E minority.³ This suggests much progress is still to be made in order to reach the government's goal to have all public appointments reflect the R&E working age population of 14% by 2022.³ In the private sector, R&E diversity on boards is lower, with only 7.5% of directors who have revealed their ethnicity in the FTSE 350 identifying as an R&E minority in 2019.⁴ Compared to 2018, the FTSE 350 made a notable improvement in specifying ethnicity in their boardroom diversity policy. However, meeting the goals set by the Parker Review to have at least one non-white director will be challenging as 59% of companies currently do not.⁴

In order to reflect an increasingly diverse workforce and build a strong pipeline of talent, it is essential that employers establish effective policies and initiatives to identify, develop and promote people of colour within their organisations. A notable portion of employers have implemented practices to actively support R&E minority career progression, with mentoring being the most common, followed by having a senior manager or leader act as a sponsor or champion according to 21% of R&E minority employees.¹ However, stated specific initiatives to increase ethnic diversity in senior management positions remain limited as only 4% of FTSE 100 firms reported on this in 2019.⁴ While there has also been an improvement in companies mentioning ethnicity in director succession planning, this still represents only a small portion of companies, with just 21% of FTSE 100 and 9% of FTSE 250 doing so.⁴

Reporting and monitoring ethnic diversity

Effective policies to measure and publicly report data on ethnic diversity are crucial to help focus action and ensure there is accountability for change. Since 2018, more FTSE 100 companies have set measurable targets for increasing R&E diversity on their boards, up from 4% in 2018 to 14% in 2019. However, the FTSE 250 made no progress, remaining at just 2% of firms.⁴ Given a lack of objective setting, it is perhaps understandable that none of the FTSE 350 reported progress against their targets in 2019, which highlights the importance of effective measurement tools to help drive action.⁴ In addition, 95% of companies have not yet analysed their ethnicity pay gap, which stems from the fact that 75% of organisations do not currently have sufficient workforce data to do so.⁵

Leveraging R&E minority talent in the face of COVID-19

COVID-19 has shed further light on longstanding inequalities affecting R&E minorities in the UK as they have been disproportionately impacted by the pandemic.⁶ Coupled with the added financial pressure of COVID-19, there is a risk that ethnic diversity will recede further as a strategic priority for organisations,⁷ putting the lives and livelihoods of the R&E minority community at greater risk. However, research has demonstrated that doing so may come with a penalty to financial performance as companies that lag on ethnic diversity are more likely to underperform on profitability.⁸ Meanwhile, those with the most ethnically diverse executive teams are 36% more likely to outperform their least diverse peers.⁸ In a time of extreme uncertainty, organisations have the opportunity to tap into the innovation and problem-solving advantages that racially diverse teams can bring.² If R&E minority talent is fully utilised, through fair representation, participation and progression, the UK economy could receive a £24 billion boost annually.² It is vital that steps are taken to tackle talent biases through systemic and cultural change, while providing transparent reporting to guide and focus actions.

1. Addressing the Barriers to BAME Employee Career Progression to the Top, CIPD, 2017
2. Race in The Workplace: The McGregor Smith Review, Department for Business, Energy & Industrial Strategy, 2017
3. Public Appointments Diversity Action Plan 2019, HM Government, 2019
4. Ethnic Diversity Enriching Business Leadership: An Update Report from The Parker Review, EY, 2020
5. Taking the Right Approach to Ethnicity Pay Gap Reporting, PwC, 2019
6. Beyond the Data: Understanding the Impact of COVID-19 on BAME Groups, Public Health England, 2020
7. Diversity Still Matters, McKinsey & Company, 2020
8. Diversity Wins: How Inclusion Matters, McKinsey & Company, 2020

* "There is no standard definition of a 'public appointment' but typically the appointment will be for a chair or non-executive director on a board of a public body or for a member of an advisory committee."³



The Parker Review

RESEARCH PARTNER

The Parker Review

The Parker Review is an independent review which urges business leaders to improve the ethnic and cultural diversity of UK Boards to better reflect their employee base and the communities they serve.

1. Source Gov.UK, January 2020)



RACE AND ETHNICITY KEY FINDINGS

84% of participating organisations with a clear strategy on Leadership Team diversity report that this strategy specifically mentions Ethnicity. This is the second highest percentage of the ten facets.

When looking at broader ethnicity initiatives which take into account organisations as a whole, just under one in three of our participating organisations (29%) have outreach programmes to recruit BAME talent and just over one in five (22%) publish their ethnicity pay gap.

Six in ten (63%) report having Leadership Team sponsorship for BAME employee networks. It is notable that there is a difference between participating FTSE 500 companies and participating NHS Foundation Trusts here, with NHS Foundation Trusts more likely to have a Leadership Team sponsor for a BAME employee network. 22 / 23 NHS Foundation Trusts answered yes to this vs. 9 / 44 FTSE 500. To note, BAME employees make up 1 in 5 (20.7%) of NHS staff and the overall BAME working population of the UK is 12.3%.¹

Just over four in ten (43%) of participating organisations report progress against measurable objectives for Leadership Team ethnic diversity across time.

In terms of positive engagement with activity to support actions to support ethnic diversity within the Leadership team, 56% have stated initiatives for increasing ethnic diversity and 49% specify ethnic diversity in Leadership Team succession planning. This pattern is consistent with results for gender suggesting that where Leadership Team initiatives are in place, they are in place for both the gender and ethnicity diversity facets.

It is important to note that the results of this survey regarding reporting Leadership Team ethnicity against measurable objectives, for having stated initiatives for increasing ethnic diversity, for specifying ethnic diversity in succession planning, and ethnicity pay gap reporting are significantly higher than those reported by other sources. The hypothesis is that this is a reflection of the importance of the R&E diversity facet for the self-selecting sample of participating organisations.



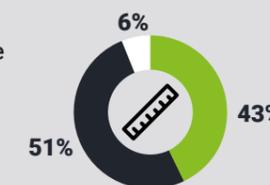
RACE AND ETHNICITY KEY RESULTS

Does the organisation:

01

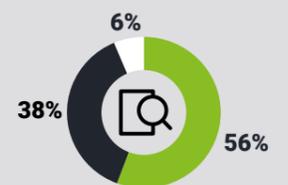
Report progress against measurable objectives for Leadership Team ethnic diversity across time?

Source Q1.1
Base: All Participants (79)



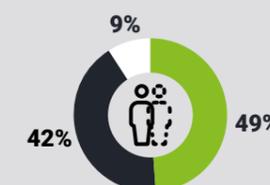
Have stated initiatives for increasing ethnic diversity within the Leadership Team?

Source Q1.1
Base: All Participants (79)



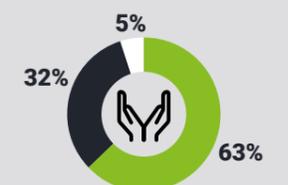
Specify Diversity in Leadership Team succession planning?

Source Q1.1
Base: All Participants (79)



Have a member of your senior Leadership Team act as an executive sponsor or formal senior champion for a BAME employee network?

Source Q1.1
Base: All Participants (79)

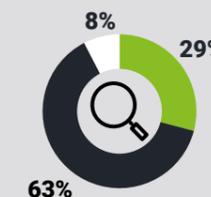


Yes No Don't know

02

Do you have outreach programmes to recruit BAME talent?

Source Q1.4
Base: All Participants (79)

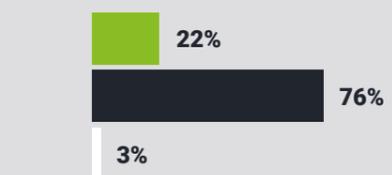


Yes No Don't know

03

Do you publish your ethnicity pay gap?

Source Q1.5. Base: All Participants (79)
*All percentages were rounded to the nearest integer.



Yes No Don't know



RECOMMENDATIONS



I firmly believe that increasing ethnic diversity in leadership teams will

PROVIDE BETTER CORPORATE PERFORMANCE

and that, to achieve such diversity, clear objectives and measurable targets are vital.

PAUL MONEKOSSO CLEAL OBE, REVIEW COMMITTEE MEMBER, NON-EXECUTIVE DIRECTOR AT ST. GUY & THOMAS'S, NHS, MET POLICE, KINGSTON UNIVERSITY, SAINSBURY'S FOUNDATION

RACE AND ETHNICITY

01

COMPLETE A DIAGNOSTIC REVIEW – ANALYSE YOUR DATA

Take action based on real, measured facts rather than 'common sense' or opinion. Bring the same standards of informed decision-making used throughout management to the business of D&I. A full analysis can help your organisation understand where you may have equity issues and provide a data-based foundation in order to set goals and where to focus initiatives related to diversity, equity and inclusion.

02

ADOPT A NO TOLERANCE POLICY TOWARDS RACISM AND PREJUDICE

Inaction is a form of action and adopting a no tolerance policy may involve redefining relationships to ensure that an active stand is taken and that leaders are held accountable. No tolerance policies ensure the message is clear – you do not agree or tolerate any form of racist behaviour.

03

CREATE SAFE SPACES

Creating safe places or "comfortable zones" within the workplace allows people to express themselves freely without fear of judgment or oppression that may exist outside of that space. This safe place is an area in which individuals are not to be challenged on account of their race, ethnicity or other identity or expression. Additional benefits of safe places and community spaces (in person or online) are that people can connect and spend time with others who have had similar experiences. They can also provide an opportunity for allies to learn from differing experiences to their own and learn more about race and ethnicity.

04

ENGAGE INTERNALLY AND EXTERNALLY

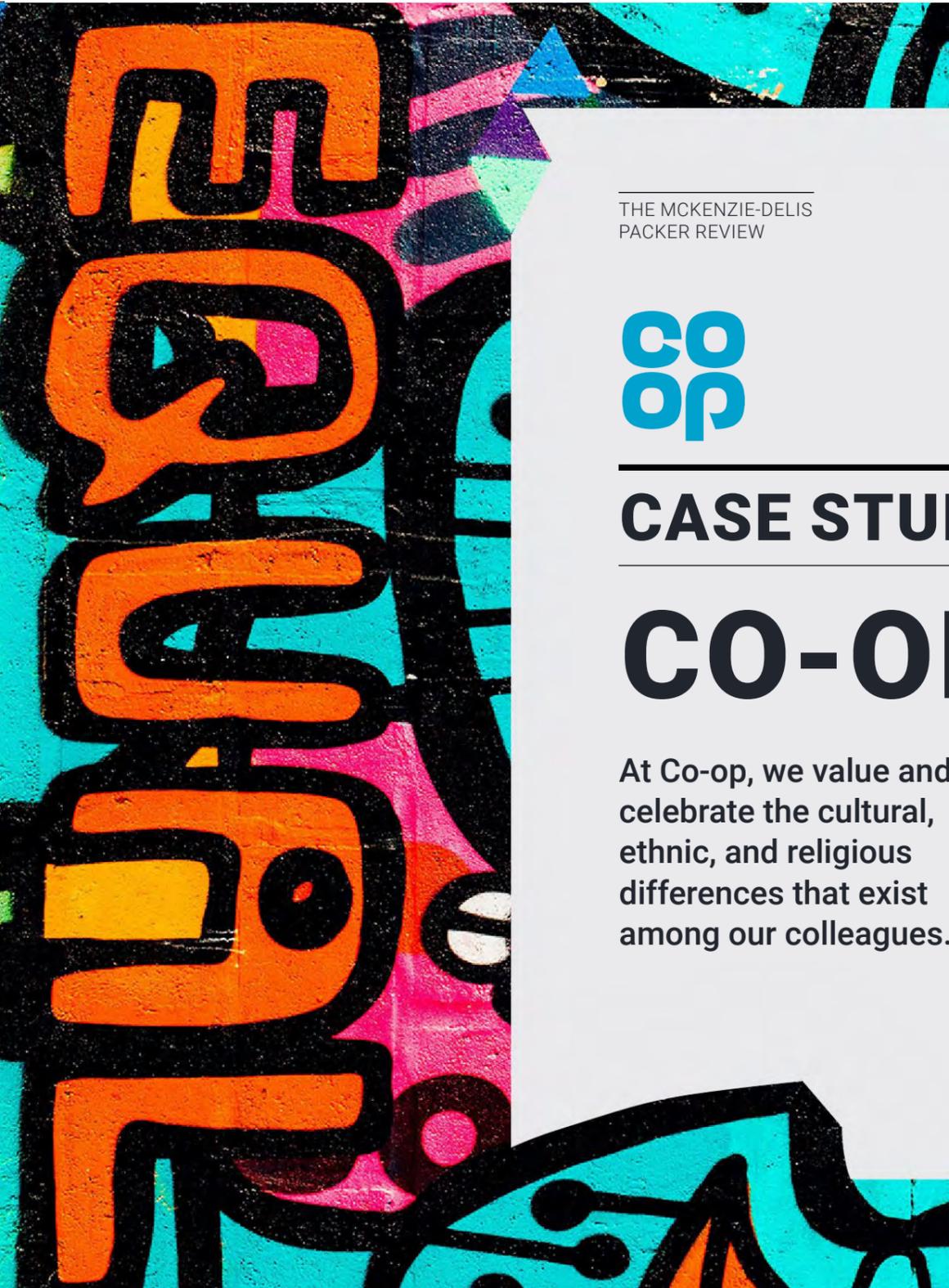
Engaging both internally and externally through constructive dialogue sends a clear message about the culture of your organisation and allows others to see you are serious about taking action. Active listening is also vital as the objective is not to simply hear someone's story or experience but to develop a human connection that

allows others to glimpse through the lens of another and transcend from the ears to the heart and ultimately change the long term belief system positively. There is often fear of "saying the wrong thing" however it is important to recognise that this is a journey and one which involves continuous improvement. No one is perfect and honest communication of where you are now is likely to mean more to people internally and externally than false commitments or statements.

05

SET CLEAR AND MEASURABLE GOALS

Successful diversity programmes have clear objectives and are led from the top (not just the CEO, but the entire top team). D&I goals are only realised when key decision-makers are accountable. Establishing realistic, achievable and relevant goals tied to accountability serves to drive change and results. Apply a race and ethnicity lens to recruitment, retention and succession planning to foster the progression of all minorities across the organisation. Ensure there is a link from the achievement of these goals to performance criteria and/or compensation for all senior leaders.



THE MCKENZIE-DELIS
PACKER REVIEW



CASE STUDY

CO-OP

At Co-op, we value and celebrate the cultural, ethnic, and religious differences that exist among our colleagues.

We have made good progress in creating a more inclusive and diverse workplace over the last couple of years but we know there is more to be done.

We have recently launched a set of commitments to Racial Equality and Inclusion. Commitments include doubling the representation of BAME leaders and managers by the end of 2022, from 3% to 6%, and to 10% in 2025; ensuring diverse shortlists for all leadership roles and partnering with organisations that will help us to reach talent from BAME backgrounds; maximising the use of our apprenticeship levy and seek partnerships and opportunities, which focus on benefitting BAME candidates; actively collecting and monitoring data that enables us to track progress and reduce inequalities within our internal systems and processes when it comes to promotion and opportunities; and requiring all of our leaders to have objectives that ensure they are playing their part in delivering our commitments to racial equality from 2021.



The stark reality is that many organisations feel that they have ‘ticked the box’ by having a D&I policy in place but are often doing far too little - and in some cases, nothing at all - to eliminate the individual, institutional and systemic racial inequalities that currently exist. The act of not being racist, is not enough. Organisations must demonstrate their commitment to being Anti-Racist by championing Inclusion and ensuring that it sits at the heart of everything they do.

HELEN WEBB, REVIEW COMMITTEE MEMBER,
CHIEF PEOPLE & SERVICES OFFICER OF CO-OP



THE MCKENZIE-DELIS
PACKER REVIEW



CASE STUDY

BOOTS

Boots, part of Walgreens Boots Alliance, is committed to creating a culture where diversity, equity and inclusion are at the centre of everything we do.

To foster this, our leaders have committed to a performance goal relating to increasing diversity in leadership and creating an inclusive climate since 2018.

This, together with the support and challenge of our HR teams and employee groups, such as the Global Inclusion Council of leaders and the Business Resource Groups, are helping us to create change.

This year, our focus has also been on the racial equity movement. Our approach is to listen, learn and act. We've created the spaces to have conversations about race at work, which has allowed BAME colleagues and allies alike to share experiences, learn from each other and ultimately shape the *racial equity charter of commitments* that we published a few months ago.

By being truly intentional, we've been able to galvanise our teams: starting to collect better diversity data, introducing a new corporate value of 'inclusion', reviewing the ranging and marketing of our own brands, and deploying learning on unconscious bias, inclusive leadership and micro-inequities.

We will continue to measure progress by our ongoing colleague feedback, by the representation of diversity at all levels and by the 'inclusion index' we introduced to our bi-annual engagement survey last year.



It is important that businesses look at true representation, by inclusion and leadership, as well as diving down on the ethnicity metrics. There will always be a number of people who do not wish to self-identify, but the metrics can and do reveal the extent of the issues for business and are often a starting point for leadership to

RE-EXAMINE

the policies and culture. The results from our participating organisations show there is focus on increasing diversity within leadership teams and hence create a pipeline for role models and progression. However, this is not just a numbers game and creating true advocates is a necessary adjunct to successfully creating sponsorship and progression.

ANDREW C. PEARCE, REVIEW COMMITTEE MEMBER, MANAGING DIRECTOR OF ACCENTURE



In 2020, the world halted, and Diversity and Inclusion entered the spotlight due to real-life injustice and inequality being felt, heard and experienced across the entire globe like never before. It is powerful to see organisations turning words of support and intent into policies, processes and practices that truly drive behavioral change and action, to address inequality and support the improvement of diverse representation in leadership.

EDLEEN JOHN FCIPD, REVIEW COMMITTEE MEMBER, INTERNATIONAL RELATIONS, CORPORATE AFFAIRS AND CO-PARTNER FOR EQUALITY, DIVERSITY AND INCLUSION DIRECTOR AT THE FA



Increasing ethnic diversity in leadership teams will likely provide better corporate performance and that, to achieve such diversity, clear objectives and measurable targets are vital. It now seems that having a board level BAME champion and a stated intention to make progress are now more common which is also good. The reality remains, however, when looking at broader ethnicity initiatives which take into account organisations as a whole, that just under one in three of our participating organisations (29%) have outreach programmes to recruit BAME talent.

Ethnicity pay gap reporting remains relatively low when compared to gender pay gap reporting. However, the upward shift in generating greater gender diversity provides positive indication that organisations can make the move toward greater strides in reporting when energy and resources are put behind this commitment.

I firmly believe that increasing ethnic diversity in leadership teams will provide better corporate performance and that, to achieve such diversity, clear objectives and measurable targets are vital.

PAUL MONEKOSSO CLEAL OBE, REVIEW COMMITTEE MEMBER, NON-EXECUTIVE DIRECTOR AT ST. GUY & THOMAS'S, NHS, MET POLICE, KINGSTON UNIVERSITY, SAINSBURY'S FOUNDATION



The results from these participating organisations provide both hope and a warning. It is encouraging that it is more likely than not that these organisations have an executive champion for BAME networks and have started initiatives to increase leadership diversity. But arguably, these are the easy shiny trophies. They are directional.

Driving change requires sustained focus on hitting measurable targets. It needs to be operational. Here, the survey results provide a warning: over half of participating organisations do not have measurable targets for ethnic diversity of leadership and two-thirds do not have outreach programmes specifically targeting BAME recruit.

WILL IT BE DIFFERENT THIS TIME?

The death of George Floyd felt like a seminal moment. But it will not prove to be so unless ambition is converted into operational reality.

SANJAY BHANDARI, REVIEW COMMITTEE MEMBER, CHAIR OF KICK IT OUT



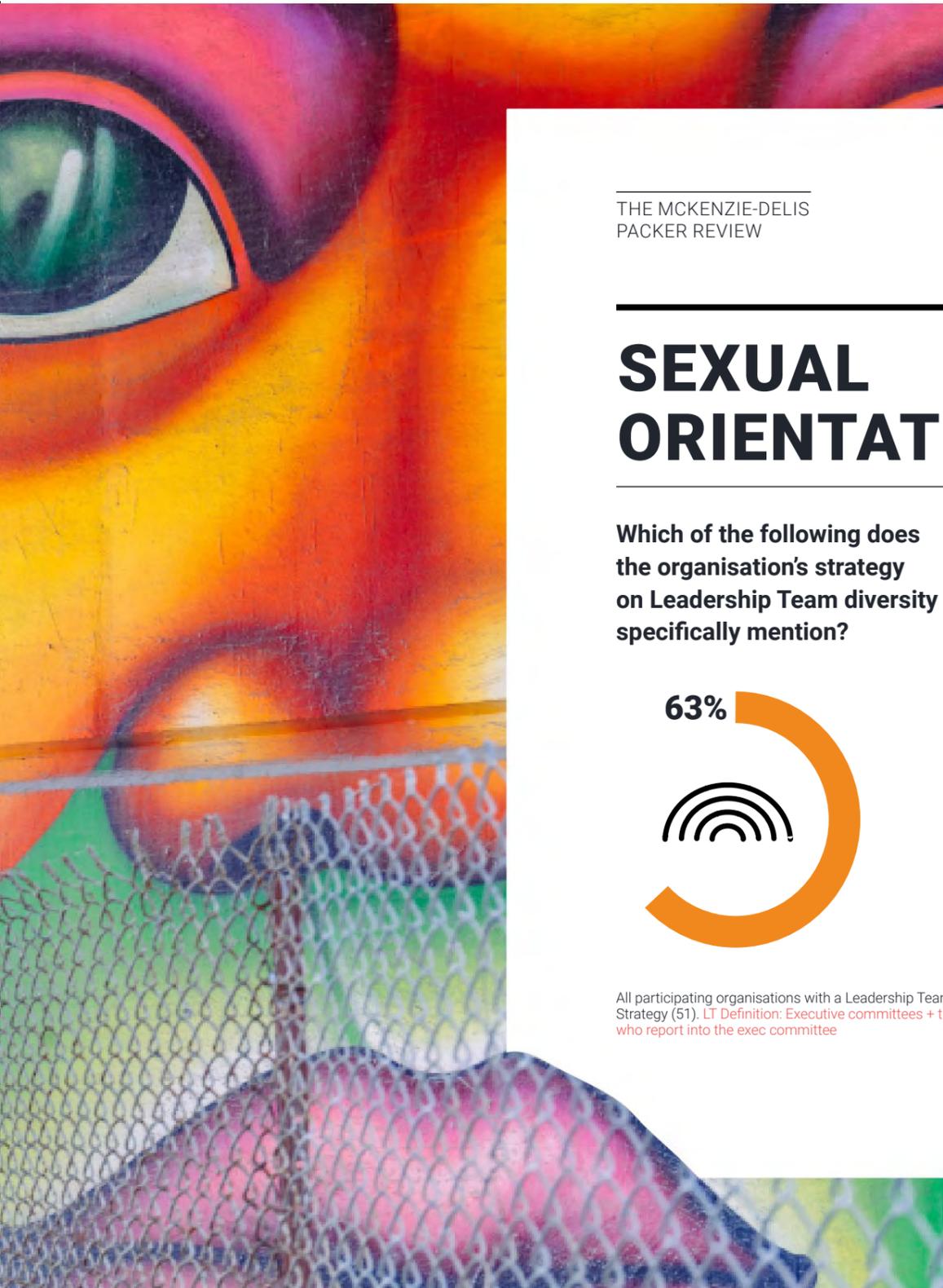
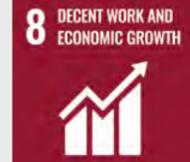
The tragic events of the past year which have exposed the systemic racial inequalities that still exist in society, as well as the workplace, should be a

WAKE-UP CALL

for organisations to take radical action to systematically review and reform their processes and policies which have historically held back the potential of ethnic minority employees, and to commit to carrying out Race Disparity Audits.

The excuse that board ready BAME talent is not there, simply does not wash anymore. What is often missing is the will to be bold and to hold your own leaders to account. In those fields which are based on pure talent and ability such as sports or the music world, we see Black and ethnic talent excelling. It's only in traditional organisations with outdated man-made and flawed practices, where BAME employees struggle to move ahead. We must remember that true equality is not only a legal requirement - but a win-win for all: inclusive companies based on ethical leadership are creative, successful, happier and kinder organisations.

SHOKU AMIRANI, REVIEW COMMITTEE MEMBER, CHAIR OF BBC EMBRACE



THE MCKENZIE-DELIS PACKER REVIEW

SEXUAL ORIENTATION

Which of the following does the organisation's strategy on Leadership Team diversity specifically mention?



All participating organisations with a Leadership Team Diversity Strategy (51). LT Definition: Executive committees + the leaders who report into the exec committee

Sexual orientation is a topic that, until now has attracted only limited attention from traditional diversity management. This was made evident when over a third of FTSE 100 companies failed to mention the inclusion of the LGBT+ (Lesbian, Gay, Bisexual, Transgender, +) community in their 2019 annual reports.^{1 2} The 'spiral of silence' methodology argues that organisational voices largely influence individuals' perceptions of the attitudes towards an issue within their workgroup. Individuals are much more likely to speak up when they believe that their position is supported by others, and remain silent when they believe that it is not. This emphasises the importance of creating a proactive environment that welcomes LGBT+ inclusion and rejects LGBT+ discrimination.

Discrimination in the workplace

While D&I have climbed corporate agendas over the past decade, many employees report facing discrimination, discomfort, and even danger in the workplace, due to their sexual orientation. Workplace discrimination are commonplace towards LGBT+ personnel in many workplace environments and have become 'tolerated' and embedded in some organisational cultures.³ It was reported that over a third of LGBT+ staff hide their sexual orientation due to fear of discrimination.⁴ LGBT+ employees may underperform when their cognitive energy is expended on hiding or concealing their true sexual orientation. Conversely, LGBT+ workers who identified themselves as 'out' in the workplace possess higher organisational commitment and greater job satisfaction as well as fewer work and home conflicts.⁵

Fostering an inclusive environment

Several authors have argued that non-discriminative, supportive workplace policies create a more positive working environment.^{6,7,8} This may lead to favourable employee outcomes, such as harder working employees that are more committed, more satisfied and more likely to be productive. This is related to higher levels of organisational support, job satisfaction and increased inclusivity of LGBT+ staff. Visible non-discriminatory policies attract potential employees generating a larger applicant pool and therefore increasing the quality of the recruited candidates. Subsequently, increasing sexual orientation diversity within a company means there is a larger total inventory of information, perspectives, and cognitive resources. This allows the company to better tackle and respond to the LGBT+ consumer market. Industries with higher CEI (corporate equality index) scores generally outperformed industries with lower CEI scores in the stock market.⁷ This supports the evidence that more diverse companies are more likely to outcompete their rivals, and that D&I not only helps individuals but also the companies as a whole.⁹

Improving engagement

According to a government survey, the proportion of the UK population who identify as LGB has risen to 2%, although this is likely higher as this does not account for people who are unwilling to disclose their sexual orientation. Coupled with the number of people in employment and the median disposable income, this equates to an LGBT+ workforce that has a potential earning power of £24 billion a year.¹⁰ COVID-19 has forced many companies to rethink how they operate, therefore offering the perfect opportunity to reset business management and revise welfare practices. There is potential to improve company efficiency and performance by improving diversity and inclusivity of LGBT+ staff, which can also help companies recuperate from the economic setback.



We know that when LGBT+ people are able to bring their whole selves to work they **THRIVE** and so do the organisations they work for.

NANCY KELLEY, REVIEW COMMITTEE MEMBER, CHIEF EXECUTIVE OFFICER OF STONEWALL

1. FTSE 100 LGBT+ Diversity Failure, High Performance Consultancy, 2019
2. National LGBT Survey: Summary Report. GOV.UK, 2019
3. Bullying: From the Playground to the Boardroom. Journal of Leadership & Organizational Studies, 12(4), 1-11, 2006
4. LGBT In Britain - Work Report, Stonewall, 2018
5. LGBT in Britain - Bi Report, Stonewall, 2020
6. The Disclosure Dilemma for Gay Men and Lesbians: Journal of Applied Psychology, 87(6), 1191-119, 2002
7. Stock Price Reactions to GLBT Nondiscrimination Policies. Hum. Resour. Manage., 49(2), 195-216, 2010
8. Pink Triangles: Antecedents and Consequences of Perceived Workplace Discrimination against Gay and Lesbian Employees. Journal of Appl. Psych., 86(6), 1244-1261, 2001
9. Diversity Wins: How Inclusion Matters, McKinsey & Company, 2020
10. LFS: Population Aged 16-64. SA - Office For National Statistics, 2020



RESEARCH PARTNER

Stonewall

Stonewall work directly with institutions to help them create inclusive, equal and inspiring environments. They ensure that institutions understand and value the huge benefits brought to them by LGBT+ people and to empower institutions as advocates and agents of positive change.



SEXUAL ORIENTATION KEY FINDINGS



63% of participating organisations with a clear strategy on Leadership Team diversity report that this strategy specifically mentions sexual orientation. This is the third highest percent of the ten facets.



However, just under four in ten (38%) of participating organisations gather and monitor data on the sexual orientation of their Leadership Team. Of the 30 organisations participating in our survey gathering this data, 25 organisations include 'Bi' as an option and 19 include 'I use another term' as an option.



When it comes to active initiatives to promote LGBT D&I over half of participating organisations (58%) have a member of the Leadership Team acting as an executive sponsor or formal senior champion for an LGBT employee network. This corresponds with the findings of this survey on executive sponsorship of employee gender networks (58% have an exec sponsor) and of BAME employee networks (63% have an exec sponsor).



44% of participating companies have had a member of their Senior Leadership Team review or approve an LGBT inclusion strategy in the past year and 42% have shared stories of visible LGBT role models from their Leadership Team in the last year.



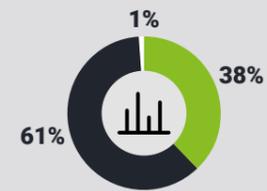
Only 9% of participating organisations use LGBT inclusion-based competency requirements in Senior Leadership recruitment.



SEXUAL ORIENTATION KEY RESULTS

01

Does the organisation gather and monitor data on the sexual orientation of its Leadership Team?

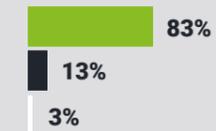


Source Q2.1
Base: All Participants (79)

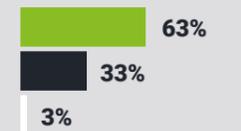
Yes No Don't know

Thinking about the data gathering on sexual orientation, does:

The data gathering question include 'Bi' as an option?



The data gathering include 'I use another Term' as an option?



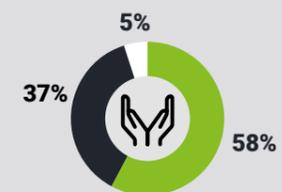
Source Q2.1
Base All who gather and monitor data on the sexual orientation of Leadership Team (30)

Yes No Don't know

02 Does the following apply to the organisation:

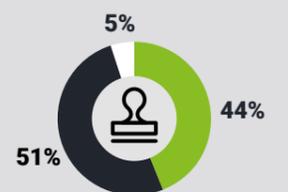
02

Does a member of your Senior Leadership Team act as an executive sponsor or formal senior champion for an LGBT employee network?



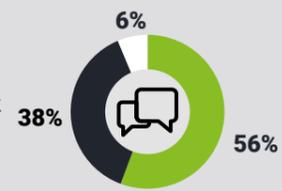
Source Q2.2
Base: All Participants (79)

Has a member of the senior Leadership Team reviewed and/or approved an LGBT inclusion strategy in the last year?



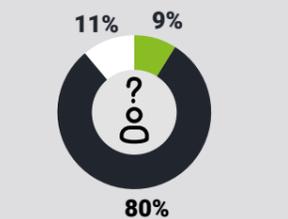
Source Q2.2
Base: All Participants (79)

Has a representative of your Senior Leadership Team met periodically with an LGBT employee network over the past year?



Source Q2.2
Base: All Participants (79)

Does senior leader recruitment include LGBT inclusion-based competency requirements?



Source Q2.2
Base: All Participants (79)

In the last year, has the organisation shared the stories internally of any visible LGBT role models from the Leadership Team?



Source Q2.2
Base: All Participants (79)

LT Definition: Executive committees + the leaders who report into the exec committee

Yes No Don't know



RECOMMENDATIONS



If we aren't clear that

INCLUSION AND EQUITY

is at the heart of our organisation from the minute a candidate walks through the front door, delivering inclusion in practice will remain an uphill battle.

NANCY KELLEY, REVIEW COMMITTEE MEMBER,
CHIEF EXECUTIVE OFFICER OF STONEWALL

SEXUAL ORIENTATION

01

RAISE AWARENESS

Promoting equality policies, celebrating PRIDE days and setting up employee groups all help to drive a better understanding of LGBT+ inclusion and making LGBT+ experiences more visible in the wider organisation. This can empower all employees to step up as allies and improve the workplace culture for everyone within your organisation.

02

LEADERSHIP ACCOUNTABILITY

Take time to review and scrutinise your organisation's policies and processes. Allow employee groups to feed back concerns, and suggestions of how these can be improved. Ensure there is senior leadership sponsorship and support active and visible.

03

BE OPEN AND TRANSPARENT ABOUT D&I

These measures sit within a broader need to showcase the company's values on D&I. A codified D&I policy, easily accessible both externally and internally sends an important message, whilst creating a virtual training programme to ensure all employees understand the policy further reinforces the importance of D&I to the organisation. Lastly, ensuring there is a clear and simple process for reporting any instances of bullying, harassment or discrimination provides the reassurance for employees that they have a voice and that voice will be heard.

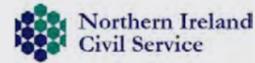
04

ENSURE THERE IS PEER-TO-PEER SUPPORT

Providing a space for LGBT+ employees to support each other, express concerns they may have, and spend time around people who understand their experiences. This can radically improve their day-to-day experience at work by helping them feel less alone, access the support they need and grow in confidence.



THE MCKENZIE-DELIS
PACKER REVIEW



CASE STUDY

THE NORTHERN IRELAND CIVIL SERVICE

The Northern Ireland Civil Service's People Strategy outlines our commitment to being an inclusive workplace for our 23,000 colleagues where diversity is truly valued and reflects the society we serve.

Our Diversity Champions Network includes senior colleagues from each department, and four diversity thematic leads.

The LGBT+ thematic lead ensures the collective LGBT+ voice is represented and targeted LGBT+ inclusion actions in our Diversity Action Plan are delivered. Our LGBT+ Staff Network has an elected committee and annual business plan.

The Network raises awareness of LGBT+ issues by sharing information and best practice through educational, social and networking events. Supporting our D&I policies, we have a Trans Equality Policy and Transitioning at Work Guide launched by the Head of the Civil Service.

The LGBT+ Network has produced a helpful guide for colleagues on using LGBT+ inclusive language. Personal stories from Network members for Pride and awareness days have resonated strongly with colleagues.

As a member of the Stonewall Diversity Champions Programme, we advertise volume recruitment campaigns on the Proud Employers website and benchmark our progress via the Stonewall Workplace Equality Index. Progress has been delivered by our senior leaders, LGBT+ thematic lead, and a dedicated LGBT+ Staff Network.



“

We know that when LGBT+ people are able to bring their whole selves to work they thrive, and so do the organisations they work for. We have made enormous strides in LGBT+ inclusion over recent years, but we need to go further, particularly in making sure that LGBT+ people are

VISIBLE IN LEADERSHIP,

and that all executives are active champions for inclusion.

Having LGBT+ role models matters, yet 61% of participating organisations do not gather and monitor sexual orientation in their leadership team and less than half spotlight leadership role models. More than half of the participating organisations have a senior sponsor for LGBT+ inclusion with regular staff engagement, but just 9% of senior recruitments in companies test LGBT+ inclusion competencies. If we aren't clear that inclusion and equity is at the heart of our organisation from the minute a candidate walks through the front door, delivering inclusion in practice will remain an uphill battle.

NANCY KELLEY, REVIEW COMMITTEE MEMBER, CHIEF EXECUTIVE OFFICER OF STONEWALL



THE MCKENZIE-DELIS PACKER REVIEW

DISABILITY

Which of the following does the organisation's strategy on Leadership Team diversity specifically mention?



All participating organisations with a Leadership Team Diversity Strategy (51). LT Definition: Executive committees + the leaders who report into the exec committee

In the UK, an estimated 14.1 million people reportedly live with a disability¹, and worldwide, there are over one billion disabled people.² Faced with an ageing population and therefore increasing health conditions, this number is expected to rise further.

The importance of disability inclusion

Despite this, only half of the 7.7 million disabled people of working age are employed and the employment gap between disabled and non-disabled people has remained around 28.1% over the years.³ Organisations that do not ensure disability inclusion are potentially losing out on a wide available talent pool and may therefore not be allowing themselves to recruit the best people for their workforce. As a reported 83% of disabilities are developed during working life,² failing to adapt business strategies and practices to be disability inclusive will also have repercussions for retaining existing talent and becoming an organisation that is resilient and flexible to thrive in the future of work.

Progress on disability inclusion

Employers are increasingly recognising the economic value that a disability inclusion strategy can bring, and are adopting practices to improve disability inclusion in their workforce. Since 2017, when the UK government set out a goal to see one million more disabled people in employment by 2027, the number of disabled employees has increased by 404,000.⁴ An increasing number of employers are showing enthusiasm towards disability inclusion and implementing positive action initiatives, including career and personal development courses for disabled people.⁵ Many more employers are also taking a more open and collaborative approach, sharing their practices with each other, and also investing in staff disability networks to bring forward the 'voice' of disabled people in their workforce.⁵ A study conducted in the US on companies that have championed disability inclusion, often through such practices, reported 30% higher profit margins compared to their peers, proving that there is a strong business case for disability inclusion.⁶

Despite seeing some positive strides to attract, recruit and retain disabled people, much progress is still needed to ensure that people with disabilities are given fair employment opportunities and suitable workplace adjustments. In particular, negative attitudes and stigma surrounding disability remain a barrier as a quarter of employers in the UK are reportedly less likely to hire a disabled person.⁷ Until these attitudes can fully shift to embrace disability inclusion, disabled people at all levels of an organisation will continue to

feel that they cannot be themselves at work. When employers provide suitable workplace adjustments and support, disabled employees can thrive in the same way as any other employee would. However, almost one in ten employers reported that they do not feel confident they could offer such support.⁸ Businesses must continue to help all employees understand the challenges that disabled people face and work to develop solutions that overcome these in order to help reduce the stigma and make finding solutions a more collaborative and inclusive process.⁹

Delivering change through disability in leadership

As with much social change, effective business leadership can play a crucial role in delivering tangible progress on disability inclusion. However, disability is still largely absent from the leadership level of most global firms.¹⁰ Only 7% of business leaders identify as disabled, and 56% of businesses claim the topic is rarely or never discussed on their leadership agenda.¹⁰ Nonetheless, it is notable that C-Suite executives have more exposure and knowledge about disability than commonly perceived, with 39% reporting that they have a family member with a disability.¹⁰ With this base of personal experience alone, senior leaders have a good foundation upon which to build disability inclusive initiatives and can use it as a touch point to drive open conversations at senior management levels. However, more visibility of disabled leaders and leaders demonstrating disability inclusive attitudes and practices is still very much needed. While it may be tempting for businesses to pull back on disability inclusion in the pressures of COVID-19, leaders must recognise that a disability inclusion strategy now, more than ever, has potential to add value to their talent pool and economic performance.

1. Family Resources Survey 2018/19, DWP, 2020
2. Leading from the Front: Disability and the Role of the Board, KPMG, 2018
3. People with Disabilities in Employment, House of Commons Library, 2020
4. 2019 Progress Report on the UK's Vision to Build a Society which is Fully Inclusive of Disabled, Office for Disability Issues and Department for Work & Pensions, 2019
5. Response to Targeted Call for Evidence to the Work and Pensions Committee on the Disability Employment Gap, Business Disability Forum, 2018
6. Getting To Equal: The Disability Inclusion Strategy, Accenture, 2018
7. Reimagining the Workplace: Disability and Inclusive Employment, Leonard Cheshire, 2019
8. Disability and Employment, Reed in Partnership and Disability Rights UK, 2016
9. 4 Ways to Improve Your Company's Disability-Inclusion Practices, BR, 2019
10. Disability Confidence: The Business Leadership Imperative, The Valuable 500, 2019



RESEARCH PARTNER

Business Disability Forum

Business Disability Forum is a not for profit membership organisation which brings business leaders, disabled people, and Government together to improve the lives and increase the economic participation of disabled people.



DISABILITY KEY FINDINGS



59% of participating organisations with a clear strategy on Leadership Team diversity report that this strategy specifically mentions disability. This is the fourth highest percentage of the ten facets.



91% of participating organisations have a process to ensure employees with disabilities and long-term conditions have the adjustments they need at work (this includes assistive technology, ergonomic equipment and flexed working times).



However, while **six in ten (60%)** of participating organisations currently communicate and engage with their workforce on why disability inclusion is important, only one third (35%) currently have senior leaders in each area of the organisation ensuring disability inclusion is factored into their business strategy. While it is encouraging to see the positive step in workforce engagement on why disability inclusion is important, focus should also be on proactive initiatives for change - such as factoring disability into business strategy.



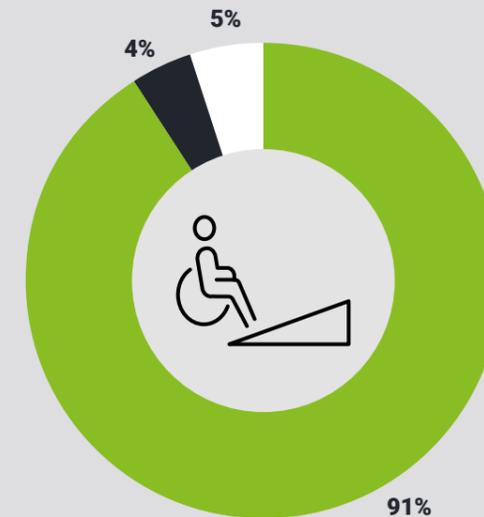
DISABILITY KEY RESULTS

Does the following apply to the organisation:

01

Does the organisation have a process to ensure employees with disabilities and long-term conditions have the adjustments they need at work (this can include assistive technology, ergonomic equipment, or flexed working times)?

Source Q6.1
Base: All Participants (79)

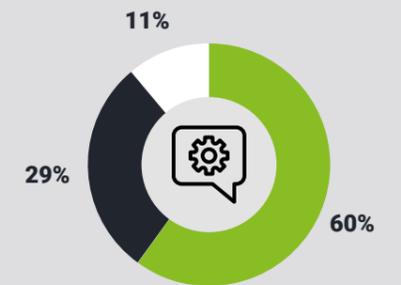


Yes No Don't know

02

Has the organisation communicated, and engaged with the workforce on why disability inclusion is important to the organisation?

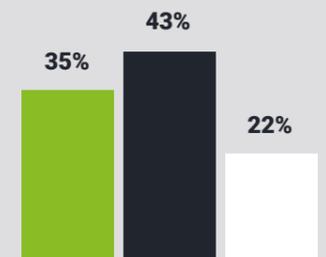
Source Q6.1
Base: All Participants (79)



03

Have senior leaders in each area of the organisation ensured disability inclusion is factored into their business strategy?

Source Q6.1
Base: All Participants (79)





RECOMMENDATIONS



If adjusting the working environment to allow your workforce to produce their best work is not at the heart of business strategy or values at the highest level, not only are talents within your workforce being wasted, but your business is not operating to its

FULL POTENTIAL

ANGELA MATTHEWS, HEAD OF POLICY AND ADVICE AT BUSINESS DISABILITY FORUM

DISABILITY

01

BUILD A SUPPORTIVE CULTURE

Over 90% of disabled people have conditions which are not immediately visible. Creating a supportive culture where people feel able to ask for the support they need is key to employee productivity and enabling everyone to bring their “whole selves” to work.

02

INCLUDE INTELLECTUAL (LEARNING) DISABILITY (ID)

Broaden disability inclusion strategies to include ID. Engage people with an ID to speak directly to Leadership Teams to share what inclusion in action looks like. Appoint ‘Champions’ within the business at all levels to test how inclusive the environment is, and mentor/buddy employees with additional needs.

03

INCLUSIVE DESIGN AND COMMUNICATIONS

Design with disability in mind. Involve disabled people from the start and build in “road bumps” and user testing so that as you develop a new product, policy or process, you review it with an accessibility and inclusivity lens. Commit to reviewing external and internal communications and developing easy-read/accessible communications and use video and audio to communicate key messages simply and with clarity.

04

LEADERSHIP IS KEY

The things senior leaders do and say have a disproportionate impact – they set the tone and “what matters round here”. Encourage senior leaders to talk about disability and to share personal experiences and stories.

05

PUT A WORKPLACE ADJUSTMENT PROCESS IN PLACE

Workplace adjustments – often very simple changes that employers can make to enable an employee to perform to the best of their ability and to remove barriers in the workplace. Workplace adjustments can be anything from assistive technology to flexible working and are at the heart of workplace inclusion – they can literally be the difference between working and economic inactivity.



THE MCKENZIE-DELIS
PACKER REVIEW



CASE STUDY

AUTO TRADER

Auto Trader's purpose is to "Drive Change, Together and Responsibly". A key part of this is to create a truly inclusive culture that embraces diversity.

I am proud of the work we are doing to achieve this aim as the lead is being taken by our Employee Networks who have passion and determination to act.

One area that stands out has been with our Disability and Neurodiversity Network who have joined forces with our People Team, Wellbeing Guild and Mental Health First Aiders Network to make a difference to the lives of colleagues and support various charities in their own work.

We were the first ever company to become "Autism Friendly" by the National Autistic Society and we have achieved "Disability Leader" status as part of the Disability Confident scheme and more recently we have joined the "Hidden Disability Sunflower" scheme.

All these efforts have raised awareness and improved the experience and representation of our disabled and neurodiverse colleagues.



We are not there yet, but we will keep moving forward so that everyone in our work community

FEELS INCLUDED

NATHAN COE, CHIEF EXECUTIVE OFFICER
AT AUTO TRADER GROUP



A fit for purpose workplace adjustments process is only as good as the employee's experience of that process. We therefore now encourage the 91% of employers who answered positively to this question to ask the same question to their employees to understand how far the employer and employees' experience match. Organisations are missing out here; inclusion agendas that lead to sustainable behaviour changes in a workplace culture are much easier to achieve when the workforce is included in the design, implementation, and review stages of the strategy. If adjusting the working environment to allow your workforce to produce their best work is not at the heart of business strategy or values at the highest level, not only are talents within your workforce being wasted, but your business is not operating to its full potential.

ANGELA MATTHEWS, HEAD OF POLICY AND ADVICE AT BUSINESS DISABILITY FORUM



Workplace adjustments are so often the key to unlocking potential and it is encouraging to see that 91 percent of participating companies have an adjustments process. But processes are only as good as their implementation, and ownership in each area of the business is critical. Senior leaders have a crucial role in normalising the conversation; putting disability on the agenda at board level as well as sharing personal stories can be transformational in making it feel safe for others to ask for the adjustments they need to be their most productive selves at work. Thanks to COVID-19 we are all working with adjustments now. Perhaps we also have a once in a generation opportunity to reimagine a world of work that works for everyone.

DIANE LIGHTFOOT, REVIEW COMMITTEE AND CHIEF EXECUTIVE OFFICER OF BUSINESS DISABILITY FORUM

**YOU CAN
RISE
AGAIN**

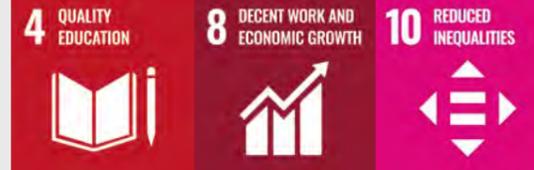


In the majority of cases, 'disability inclusion' refers to physical disability and physical adaptations to the workplace. A truly inclusive organisation needs to also consider the circa 1.7 million people who live with an intellectual (learning) disability.

**94% OF THIS
GROUP ARE
UNEMPLOYED —**

this figure is set to rise. This requires leaders to think differently and creatively. Being open to new thinking and voices means that leaders can add value to their talent pool and economic performance.

MICHELLE CARNEY, REVIEW COMMITTEE MEMBER, CHIEF EXECUTIVE OFFICER OF SPECIAL OLYMPICS GREAT BRITAIN



THE MCKENZIE-DELIS PACKER REVIEW

AGE AND GENERATION

Which of the following does the organisation's strategy on Leadership Team diversity specifically mention?



All participating organisations with a Leadership Team Diversity Strategy (51). LT Definition: Executive committees + the leaders who report into the exec committee

The UK workforce is undergoing profound demographic change. A third of workers are over the age of 50, exceeding over ten million, with people increasingly choosing to work into their 70s.¹ This swell at the upper-end of the worker age range coincides with reduced numbers of younger people expected to enter the labour market in coming years, including both home-grown and immigrated talent, making their replacement a likely challenge in the future.² There is strong evidence showing that supporting age-diverse workplaces is good for workers of all ages and the UK economy.³ Therefore, the need to accommodate older employees appropriately is essential to UK workplaces.

Age discrimination in the workplace

Age is a protected characteristic under the Equality Act, however, it is amongst the most outwardly discriminated characteristics, particularly in recruitment, where age bias is pervasive. Age-based discrimination is also rarely seriously addressed: employment tribunals on the grounds of age are uncommon and only 69% of employees are aware of its protected status under the Equality Act. Consequently, mismanagement of age-related diversity issues is rife. Of those UK employers with explicit policies regarding age discrimination, 22% have still faced problems managing age diversity in the workplace.⁴ It was reported that 40% of over 50s believe that their age would disadvantage them in applying for a job. Moreover, 47% of workers aged over 50 believe their companies' policies preventing discrimination based on age are ineffective.¹ As a result, many industries see a significant drop-off in their numbers of older workers. The figures are most exaggerated in finance, public administration and ICT, sectors vital to the UK economy that are expected to continue to grow in the future, which have seen declines in excess of 60% in the number of employees aged between 60-64 compared to those in the 45-49 bracket.² However, there are a wide range of benefits to businesses that promote an age diverse workforce. In addition to their wealth of experience and skills, employers report that older workers are loyal, reliable, committed and conscientious,² and are particularly suited to customer-facing roles.³ Moreover, the combination of different perspectives in teams combining younger and older employees has been shown to improve productivity.⁵

Flexible working

To promote older worker retention, businesses must enact policy that meets the needs of this group. Flexible working and work-from-home arrangements have received notable attention during the COVID-19 pandemic, with many employers realising their viability and employees enjoying an improved work-life balance. In particular, older workers benefit

from flexible working arrangements as it helps to balance caring responsibilities and personal health circumstances, as well as assisting a gradual transition to retirement. Advertising roles as flexible, as well as informing existing employees of their Rights to Request will encourage applications from older candidates, and will help retain those already employed.

Managing health

The greatest cause for employees to leave work before their intended retirement is due to health concerns, with more than 20% of people aged between 50 and state pension age that are out of work leaving their last job due to a health condition.⁶ While older people are more predisposed to developing a health condition than their younger peers, it is often the mismanagement of the issue, rather than the age of the employee themselves, that shortens their working life.¹ Musculoskeletal conditions, circulatory problems and Type 2 diabetes are the most prevalent conditions associated with ageing, however they often exhibit slow onset and few outwardly visible symptoms, resulting in both employees and employers delaying taking preventative action. Moreover, many employees fear negative repercussions when reporting health concerns, leading them to try and manage it alone, and often resulting in significant unplanned sickness leave.⁷ Consequently, 42% of workers aged over 45 received no support from their employer for their health condition, while concurrently 41% of those with a health condition believe that greater understanding and empathy from their employer would be the most important factor for their continuation in their job. It is to the mutual benefit, therefore, of both employees and businesses to enact a preventative, supportive approach to those employees with long term health conditions, which are particularly prevalent amongst older workers.

The older workforce is already the reality in the UK, and is set to age further in coming years. It is essential that businesses work to attract and retain older workers or risk being outperformed by competitors.⁸ To achieve this, employers must normalise the conversation regarding health at work to create a supportive, empathetic and open culture, and meet the unique needs of older employees in other capacities as well.

1. Becoming an Age-Friendly Employer: Evidence Report, Centre for Ageing Better, 2018
2. Avoiding the Demographic Crunch: Labour Supply and the Ageing Workforce - Policy Report, CIPD, 2015
3. A Silver Lining for the UK Economy? The Intergenerational Case for Supporting Longer Working Lives. Centre for Ageing Better, 2018
4. Employer Skills Survey 2017: Research Report. IFF Research, 2018
5. What makes Age Diverse Teams Effective? Results from a Six-Year Research Program, 41, 5145-5151, 2012
6. Fuller Working Lives: Evidence Base 2017, DWP, 2017
7. Health Warning For Employers: Supporting Older Workers With Health Conditions, Centre For Ageing Better, 2018
8. Becoming An Age-friendly Employer, Centre For Ageing Better, 2018



RESEARCH PARTNER

Centre for Ageing Better

The Centre for Ageing Better aims to support older people to be in fulfilling work by helping employers create age-friendly workplaces and improve support for older jobseekers. It aims to change policy and practices, informed by evidence, to improve health, housing, communities and employment for older people.

“In many respects age remains a ‘forgotten’ characteristic in terms of D&I. Many survey respondents did not see an issue or need to change within their own organisation. Only 17% of participating organisations felt they faced issues with managing age-diversity at work, or challenges with the retention and promotion of older workers. Just under six in ten (58%) believe that they already have measures in place to reduce age-bias in recruitment, however we know that this is not the experience of many older applicants with the majority of over 50s saying they feel disadvantaged because of their age.¹

A potential willingness to take a more proactive approach is highlighted in two thirds of participating organisations (67%) who would consider a pledge to be an age-friendly employer.”

PATRICK THOMSON, SENIOR PROGRAMME MANAGER, CENTRE FOR AGEING BETTER

1. <https://www.ageing-better.org.uk/good-recruitment-older-workers-grow>



AGE AND GENERATION KEY FINDINGS



Nine in ten (91%) of participating organisations recognise the benefits of an intergenerational workforce. This is supported by the range of opportunities offered by the majority of organisations who took part that support older employees, including opportunity to gradually reduce working hours/work part time (83%), the opportunity to work from home (78%), and the availability of family care leave (67%) and sabbatical leave (63%). Just over half offer opportunities to change roles/retrain (58%).



For participating organisations, areas of opportunity include considering peer support networks for older workers (currently only one in ten have these), and exploring training/development programmes specifically for older workers (only 7% of participating organisations currently offer this).



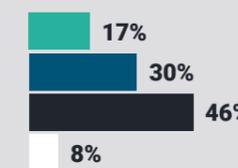
AGE AND GENERATION KEY RESULTS

To what extent, if at all, do you agree or disagree with the following statements related to the organisation:

01

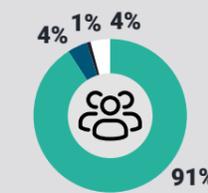
The organisation has faced issues with managing age diversity at work.

Source: Q5.1
Base: All Participants (79)



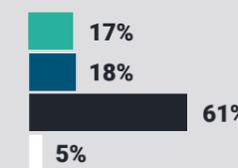
The organisation recognises the benefits of an intergenerational workforce.

Source: Q5.1
Base: All Participants (79)



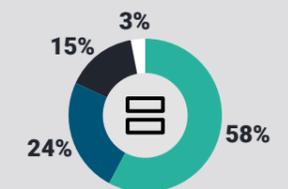
The organisation faces challenges with the retention and promotion of older workers.

Source: Q5.1
Base: All Participants (79)



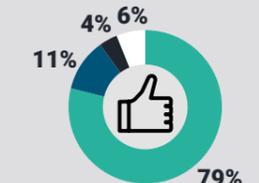
The organisation has measures in place to reduce age bias in recruitment.

Source: Q5.1
Base: All Participants (79)



The organisation would consider a pledge to be an age friendly employer.

Source: Q5.1
Base: All Participants (79)



Legend: Agree (green), Neither agree nor disagree (blue), Disagree (dark blue), Don't know (white)

02

Which, if any, of the following opportunities does your business offer to support later life working?



Source Q5.2
Base: All Participants (79)



RECOMMENDATIONS



IT IS CLEAR THAT MEMBERSHIP OF A BOARD IS STILL REGARDED AS SOMETHING FOR LATER IN CAREER. ALTHOUGH

EXPERIENCE AND CREDIBILITY IS KEY,

BUSINESSES SHOULD BE OPEN TO THE BENEFITS THAT A DIFFERENT GENERATIONAL PERSPECTIVE CAN BRING AND SHOULD FACTOR THIS IN WHEN CONSIDERING THE RANGE OF SKILLS REQUIRED.

SAM ALLEN, REVIEW COMMITTEE MEMBER,
MANAGING DIRECTOR OF SAM ALLEN ASSOCIATES

AGE AND GENERATION

01

USE DATA TO UNDERSTAND YOUR WORKFORCE

Take action based on real, measured facts rather than 'common sense' or opinion. Employers need to analyse their data by age to understand whether they are treating older candidates and employees fairly when it comes to recruitment, performance, training and progression.

02

OPEN A DIALOGUE

It is vital to foster an inclusive culture and create safe spaces for employees. Engage older workers at all levels to understand their experiences and issues they face. Talk to your older workers and find out what they would like to see added to your learning programmes. You may find many of them want to contribute to others' development through mentoring programmes or expert sessions.

03

EXAMINE YOUR RECRUITMENT PROCESSES

Age should never be a barrier to applying for a suitable role. Older workers in particular may face discrimination when applying for roles. This can often be down to bias when recruiting — making assumptions that because someone is older they won't be as capable, will want more time off, will more likely have a health condition, will want to wind down and retire, will be set in their ways, will be difficult to manage.

04

MENTORING SCHEMES

Can encourage a learning and development culture organisation wide. Encouraging the relationships between different generations, levels and diversities across the workforce promotes professionals to share their knowledge and experience while creating a harmonious and more engaging environment within which to work.



The impact of Covid-19 is being felt by both younger and older workers in terms of the numbers being furloughed and made redundant. We know from past recessions that older workers are less likely to ever return to work. We risk a lost generation if we do not support these people to re-enter work. This may require retraining to

SUPPORT THEM TO CHANGE ROLES

or move sectors, and it will require employers to remove barriers including age bias in how they recruit.

ANNA DIXON, REVIEW COMMITTEE MEMBER, CHIEF EXECUTIVE OFFICER OF THE CENTRE FOR AGEING BETTER

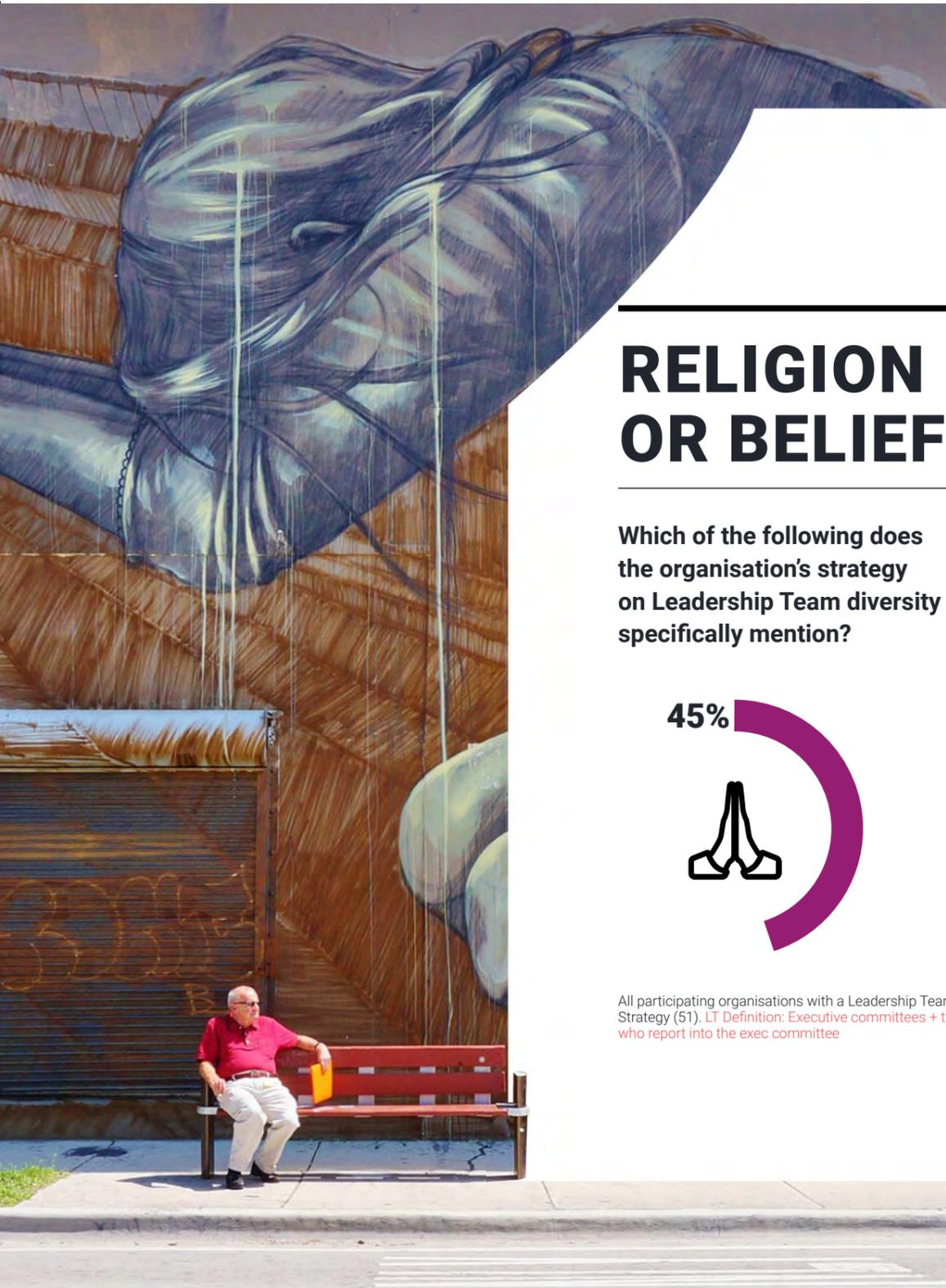
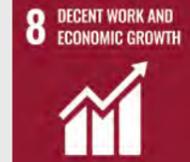


WHILST IT IS ENCOURAGING THAT A LARGE MAJORITY OF COMPANIES HAVE INITIATIVES IN PLACE TO SUPPORT LATER LIFE WORKING I AM MUCH MORE CONCERNED, FROM AN

INTER GENERATIONAL FAIRNESS PERSPECTIVE,

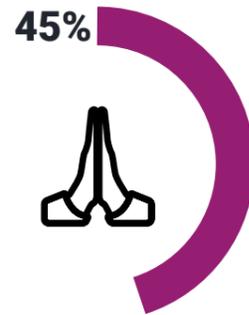
ABOUT THE YOUNGER GENERATION COMING INTO THE WORKFORCE. WE NEED MORE YOUNGER PEOPLE ON BOARDS TO BRING THE INTERGENERATIONAL PERSPECTIVE. TO ME IN A RAPIDLY CHANGING AND INCREASINGLY DIGITAL WORLD THAT FEELS LIKE THE RIGHT THING TO DO - TO FACILITATE BUSINESS SUCCESS AND GOVERNANCE.

ANDREW ALLNER, REVIEW COMMITTEE MEMBER, NON-EXECUTIVE CHAIRMAN OF SIG PLC, SHEPHERD BUILDING GROUP LIMITED AND FOX MARBLE HOLDINGS PLC



RELIGION OR BELIEF

Which of the following does the organisation's strategy on Leadership Team diversity specifically mention?



All participating organisations with a Leadership Team Diversity Strategy (51). LT Definition: Executive committees + the leaders who report into the exec committee

Diversity in the workplace encompasses more than surface-level diversity such as age and ethnicity; it also includes deeper-level diversity such as religion and belief.¹ While some religious identities can be invisible to co-workers, others may have visible signifiers such as wearing religious clothing or a religious symbol. Discrimination arises when an individual is subjected to direct discrimination, indirect discrimination, harassment and/or victimisation for reasons related to their religion or their belief, or indeed, a lack of religion or belief. Despite being illegal in the UK, and one of the nine protected characteristics in the Equality Act 2010, 3% of British workers report that they have personally experienced religion- or belief-related discrimination, which is approximately one million people.²

Support at work

It is important that workplace policy includes serious consideration to employees who request religious accommodations, whilst carefully weighing them up with business decisions. Religious accommodations can include time off work for religious holidays, requests made during the interview process, accounting for dietary requirements, dress codes and religious symbols as well as opting out of work duties that misalign with an individual's religion or beliefs.³ Whilst employers should continue to consider such requests with sympathy and flexibility, it is vital that employers create a workplace environment that allows employees to feel able to make such requests without fear of repercussion or discrimination.

Some employees may feel unable to challenge such discrimination for fear of being viewed as difficult and insensitive, and further alienating themselves.⁴ Employers can combat this by creating a supportive environment for such issues to be dealt with. Often, situations where discrimination arises can be resolved by a manager having an informal discussion with an employee and bringing awareness to the offence caused.⁵ However, it has been reported that 33% of HR managers feel that they have not had adequate training when it comes to dealing with such discrimination as well as other forms of overt religious discrimination.²

Awareness training

Employers can address religion and belief discrimination in the workplace by providing awareness training for all staff in order to promote empathy and a mutual understanding of others. By fostering good relations and providing a safe climate for employees to openly discuss religion at work, this can enhance job satisfaction, wellbeing and enable employees to bring out their best.⁶ Moreover, it has been shown that individual and collective performance can be improved by better managing religion and belief in the workplace,⁷ and it is crucial that companies balance both organisational needs and employees' preferences in how religion is practised at work.⁸ Indeed, it is important that companies not only respect religion and belief in the workplace but also learn how to manage it for better inclusivity and productivity.

The role of religion in COVID-19

As companies look to better navigate the COVID-19 world, appreciating and valuing religion and belief diversity in the workplace may be key in helping companies combat decreased employee morale. The pandemic has caused large-scale anxiety and uncertainty amongst the UK workforce and for many, religion is a source of comfort and solace.⁹ Religious identity and belief can be core to how employees want to express themselves and thus relate to other co-workers. Therefore, it is paramount that employees feel able to express their authentic self especially during these difficult times.

1. Religious Identity in the Workplace: A Systematic Review, Research Agenda, and Practical Implications, Hum. Resour. Manage., 59(2), 153-173, 2020
2. Belief at Work: Faith in the Workplace 2017 Survey, Savanta ComRes, 2017
3. Religion or Belief: Frequently Asked Questions, Equality and Human Rights Commission, 2019
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5. Religion or Belief Discrimination: Key Points for the Workplace, Acas, 2018
6. Applying Models of Employee Identity Management across Cultures: Christianity in the USA and South Korea, J. Organiz. Behav., 35(5), 678-704, 2014
7. Religious Diversity in the Workplace, Cambridge University Press, 2017
8. Oxford Handbook of Diversity in Organizations, Oxford University Press, 2015
9. COVID-19: The Role Of Religion And Spirituality In Supporting Employees Through Hard Times At Work, HRD Connect, 2020



RESEARCH PARTNER

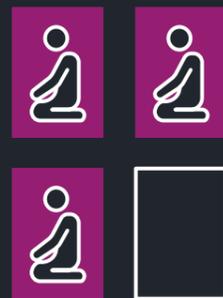
Advised by David Perfect, Senior Research Manager at the Equality and Human Rights Commission. Religion or belief is one of the nine protected characteristics in the Equality Act 2010. People have legal protection from being discriminated against because of religion or belief, or lack of religion or belief, under the Act.



RELIGION OR BELIEF KEY FINDINGS



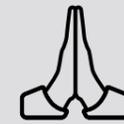
Nearly nine in ten (87%) of participating organisations recognise the benefits of a diverse workforce that includes a wide range of religions or beliefs and eight in ten (80%) say their employees are able to speak openly about their beliefs in the workplace.



The results show that the majority of participating organisations allow for some religious accommodations in the workplace. For example, three in four (75%) provide a dedicated space or prayer room for employees and just over six in ten (62%) ensure the dietary requirements of religion or belief groups are met at work. Just under six in ten (58%) of participating organisations say they permit employees to establish religion or belief networks, although seven in ten (73%) allow employees to openly discuss their religion or beliefs.



Just over four in ten of participating organisations (43%) currently collect and monitor employee data by religion or belief. It is notable that there is a difference between participating FTSE 500 companies and participating NHS Foundation Trusts here, with NHS Foundation Trusts more likely to collect and monitor data by religion or belief. 21 / 23 NHS Foundation Trusts answered yes to this vs. 10 / 44 FTSE 500.



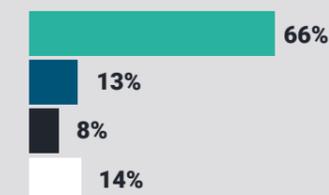
RELIGION OR BELIEF KEY RESULTS

To what extent, if at all, do you agree or disagree with the following statements?

01

The Equality Act 2010 provides clear guidance for managing religion or belief requests in the organisation.

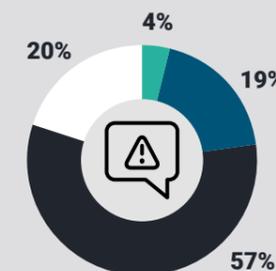
Source Q8.1
Base: All Participants (79)



02

Employees in the organisation have raised religion or belief grievances that are difficult to resolve.

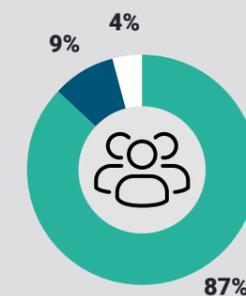
Source Q8.1
Base: All Participants (79)



03

The organisation recognises the benefits of a diverse workforce which adheres to a wide range of religions or beliefs.

Source Q8.1
Base: All Participants (79)



04

The organisation considers that the workplace should be a secular space and discussion about beliefs are not allowed.

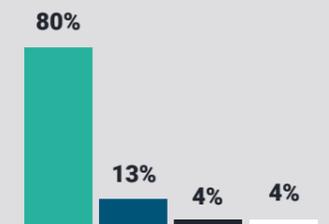
Source Q8.1
Base: All Participants (79)



05

Employees are able to speak openly about their beliefs in the workplace.

Source Q8.1
Base: All Participants (79)



Agree Neither agree nor disagree Disagree Don't know



RECOMMENDATIONS



There is opportunity here for leaders and colleagues to encourage more debate and **UNDERSTANDING** of employees' religious beliefs, and the impact this has on their working environment, wellbeing and interaction with others.

RICHARD TOPLISS, VIEW COMMITTEE MEMBER, MANAGING DIRECTOR, NORTH OF ENGLAND AT NATWEST

RELIGION OR BELIEF

01

PROVIDE SAFE SPACES FOR RELIGIOUS REFLECTION

In addition to dedicated spaces for prayer and other religious practices, organisations should support and encourage Employee Resource Groups (ERGs) and networks that bring together various communities, including religion. These ERGs not only provide mentoring, networking and informal pastoral support for other employees; they also provide employers with a valuable source of feedback for ways in which the organisation can boost its D&I.

02

THE MORE YOU KNOW, THE MORE YOU UNDERSTAND

Celebrating the variety of cultures, customs and religious beliefs throughout the calendar year, provides great opportunities for employees to come together, celebrate their colleagues and learn something new.

This can be achieved through a variety of measures, such as marking in internal communications messages, providing leadership support for employee-led religious celebrations and showcasing diverse employees and the work of ERGs.

03

BE MINDFUL OF RELIGIOUS DIVERSITY THROUGHOUT THE RECRUITMENT JOURNEY

Simple measures such as ensuring all job adverts include the company's diversity & inclusion statement; providing guidance to recruiters on how to reduce unconscious bias and being mindful of when interviews are scheduled and ensuring candidates are aware of the D&I initiatives. Additionally, during the onboarding, companies could consider a dedicated D&I discussion with new recruits to ensure any occupational or religious requirements are addressed from day one.

04

BE OPEN AND TRANSPARENT ABOUT DIVERSITY & INCLUSION

These measures sit within a broader need to showcase the company's values on D&I. A codified D&I policy, easily accessible both externally and internally sends an important message, whilst creating a virtual training programme to ensure all employees understand the policy further reinforces the importance of D&I to the organisation. Lastly, ensuring there is a clear and simple process for reporting any instances of bullying, harassment or discrimination provides the reassurance for employees that they have a voice and that voice will be heard.



THE MCKENZIE-DELIS
PACKER REVIEW



CASE STUDY

CAMBRIDGESHIRE & PETERBOROUGH NHS FOUNDATION TRUST (CPFT)

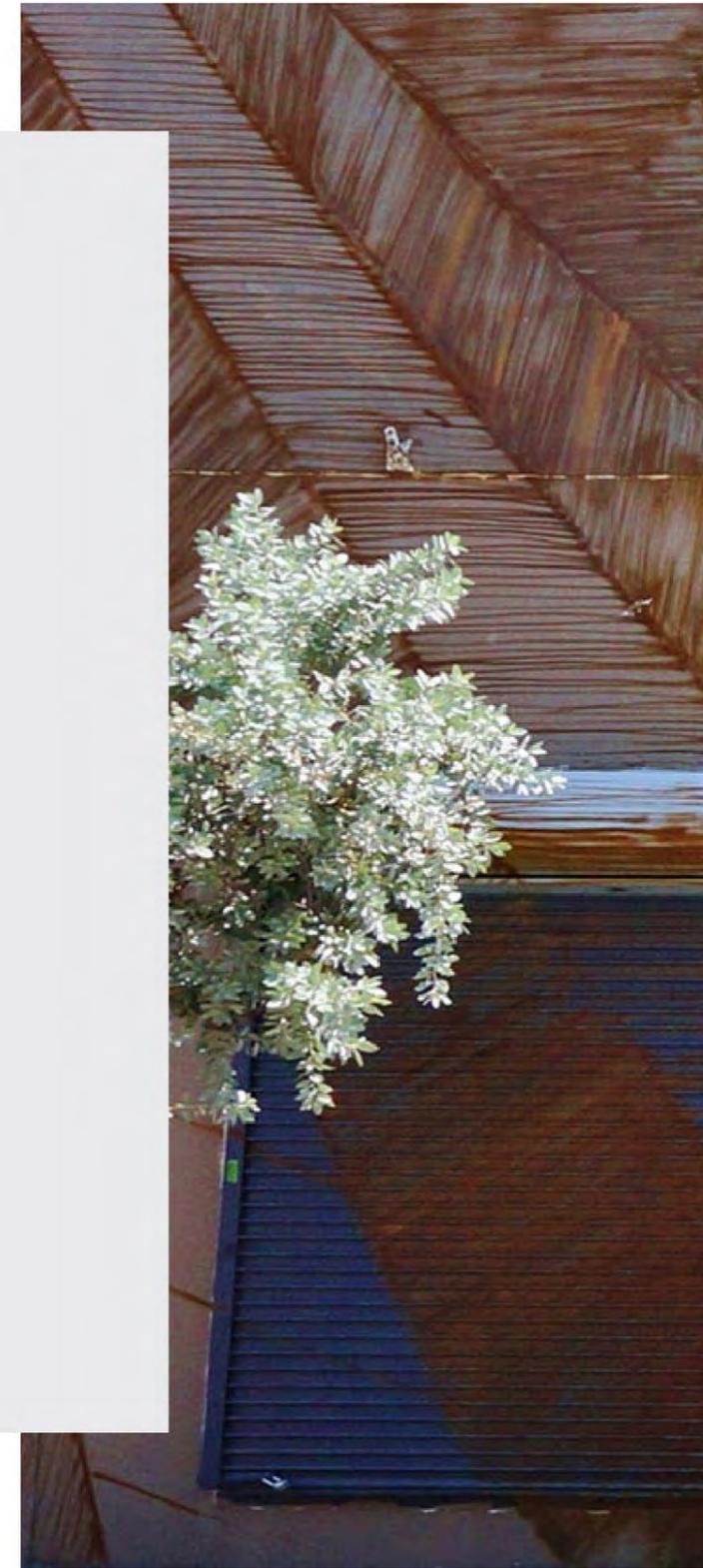
Cambridgeshire & Peterborough NHS Foundation Trust (CPFT) has committed to the ongoing development and promotion of religious inclusivity.

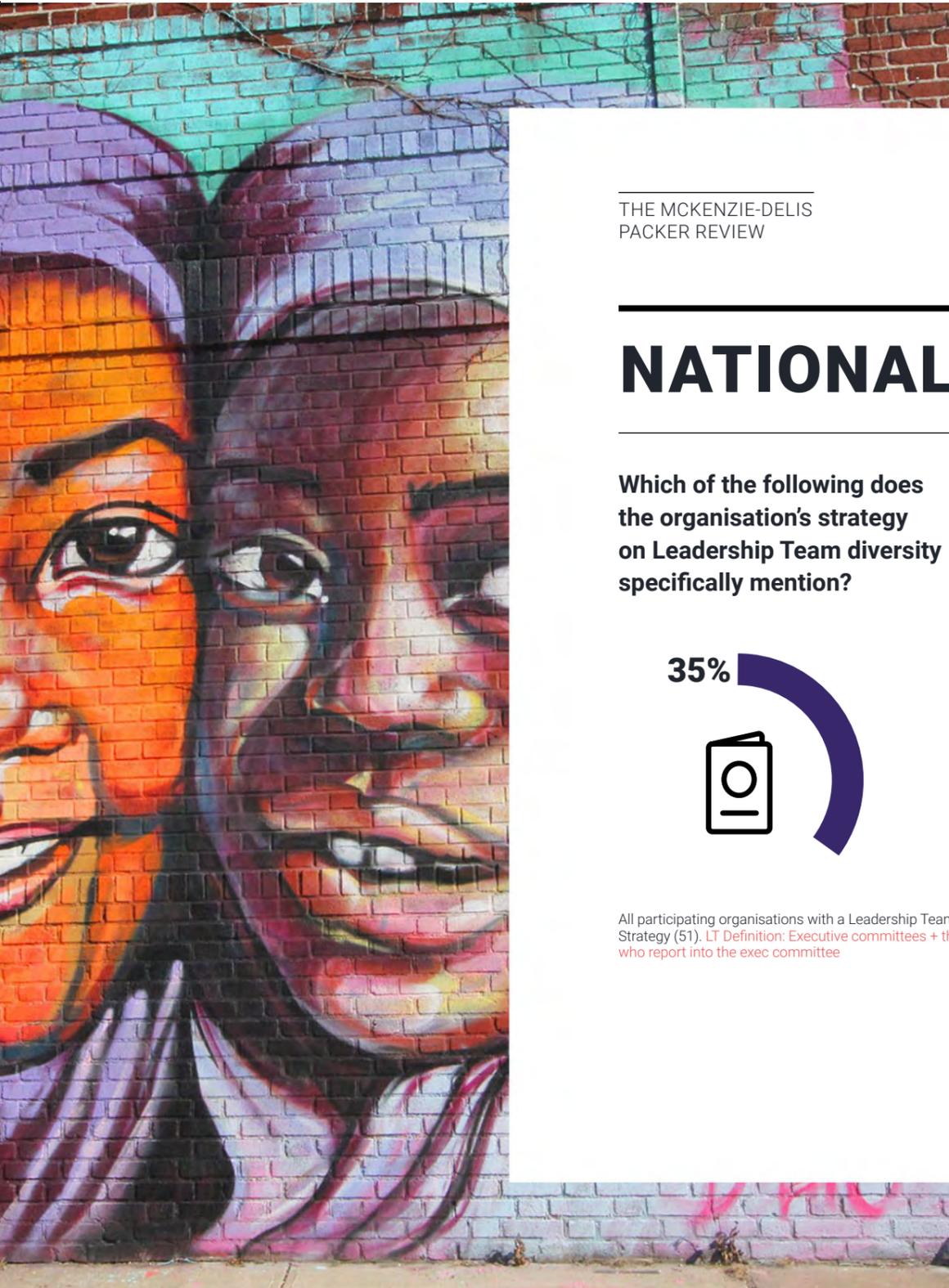
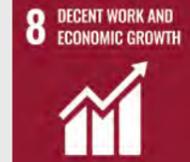
This work has included the development of a diverse Pastoral and Spiritual Care Team that reflects the community we serve, including a Muslim Chaplain and Peer Support Worker from a BAME background.

In addition, we have used a targeted approach to improve personal data on our Electronic Staff Record, which has resulted in a 27% increase in the religion dataset. Our annual programme of events celebrate faith, spirituality and pastoral care, and is welcoming and open to everyone.

Our ongoing development also includes referral points for connecting people in our care with a trusted partner within their own faith community.

Lastly, by implementing the Heart and Soul Strategy, led by the Spiritual and Pastoral Care Team, we actively campaign for all that is good, kind, human and holistic in healthcare within the CPFT family and our wider community.

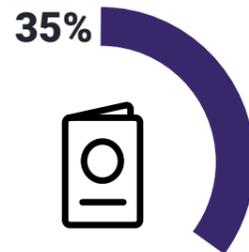




THE MCKENZIE-DELIS PACKER REVIEW

NATIONALITY

Which of the following does the organisation's strategy on Leadership Team diversity specifically mention?



All participating organisations with a Leadership Team Diversity Strategy (51). LT Definition: Executive committees + the leaders who report into the exec committee

As businesses are progressively recognising the importance of nationality diversity in the workplace, the placement of international directors on boards is increasing. The UK has been following this trend, with analysis showing that British businesses are more internationally diverse than their counterparts around the world. It was found that 70% of all international businesses analysed have at least one non-national director¹ on their board, with that figure being 89% amongst the FTSE 100.²

Company board should reflect customer base

Despite this positive trend, representation of emerging markets on boards amongst British businesses is lacking, with directors from emerging markets currently only filling 7% of positions on UK boards.² As trade with emerging markets accounts for 25% of British exports,² and as competition from emerging markets increases, this represents a potential gap between international issues a company faces, and the knowledge its domestic board members bring. The UK lags behind all other G7 countries in terms of its exports to E7 countries, relative to the potential implied by its GDP.² The importance of increasing emerging market representation on UK boards is particularly significant in order for post-Brexit Britain to improve trade beyond the EU. Businesses internationally are adopting the view that a company's board should reflect its customer base;³ as the UK enters into foreign markets, board member representation will need to reflect this change in order to have the tools and knowledge to successfully pivot into these markets. If the UK were to meet expectations, its E7 trade could increase by 43.2%, amounting to US \$14.5 billion in additional exports.²

The benefits of nationality diverse teams

As companies continue to operate across multiple regions, manage global supply chains and interact with international clients and partners, increasing the nationality diversity of Leadership Teams is vital for companies that aim to operate businesses internationally in both traditional and emerging markets. This is not only an advantage in terms of expanding customer reach, but also important in improving decision making and fostering innovation and creativity in the workplace.⁴ The presence of minority members on a Leadership Team brings new perspectives and experiences, which in turn enhances problem solving.⁵ A commonality prevalent across Leadership Teams in the UK is the homogeneity of board membership when it comes to the representation of emerging markets.⁶ This can hinder team performance, as studies show that the integration of a wide range of perspectives and knowledge in a diverse team can enhance board effectiveness, and improve decision making on issues regarding company performance, strategy and risk.²

Economic regeneration and social justice

As business leaders attempt to navigate the post-COVID-19 world, it can be easy to neglect challenges surrounding D&I. However, both the pandemic and the Black Lives Matter movement have brought issues of discrimination and diversity to the forefront of people's minds. The best businesses will know how to make the most of this and turn it into an opportunity for both economic regeneration and social justice. Through tackling these challenges and building internationally diverse teams, business leaders will be able to foster better decision-making and draw upon a wider breadth and depth of diverse experience and knowledge.⁷ As a result, companies that improve their nationality diversity will find that they are able to make better and bolder decisions, as well as radically innovate and anticipate shifts in consumer needs.⁸ Therefore, as companies plan for the future, a diverse Leadership Team may be exactly what companies need to gain a competitive edge and recover.



it's important for companies to really see those from an international background, and indeed immigrants, as a **REAL ASSET** and help to build the pipeline.

SHOKU AMIRANI, REVIEW COMMITTEE AND CHAIR OF BBC EMBRACE

1. The Egon Zehnder 2016 Global Board Diversity Analysis, 2016
2. The Global Future Diversity Index: International and Cultural Diversity in British Business, Global Future, 2018
3. Global Board Diversity Tracker: Who's Really on Board?, Egon Zehnder, 2018
4. Diversity Matters, McKinsey & Company, 2015
5. The Difference: How the Power of Diversity Creates Better Groups, Firms, Schools, and Societies, Princeton University Press, 2007
6. Achieving Gender Balance on British Boards with the Soft-Law Approach: Directors' Perspective, Journal of Business Diversity, 18(1), 29-39, 2018
7. Top Management Team Nationality Diversity and Firm Performance: A Multilevel Study, Strat. Mgmt. J., 34(3), 373-382, 2013
8. Diversity Wins, McKinsey & Company, 2020



RESEARCH PARTNER

Global Future

Global Future is a leadership consultancy committed to helping organisations build openness, D&I into the way they operate. The Global Future Think Tank supports the leadership consultancy in researching new insights across society, business and the arts to help drive the openness agenda.



NATIONALITY KEY FINDINGS



More than three in four (77%) of participating organisations are collecting data on the nationality of employees.



Out of this 77%, 86% collect data at multiple levels of the organisation across entry, middle and senior level jobs, as well as the Leadership Team.



While hiring managers/HR are obliged to establish proof that Non-UK nationals are eligible to work in the UK, they do not have to record employee nationality. This point of the onboarding process presents the opportunity for all organisations to collect this information if they wish.



Moving forward, organisations have the opportunity to further use the data collected to support people of different nationalities and use the benefits of nationality diversity in their teams to gain a competitive edge and embed a rich organisational culture.

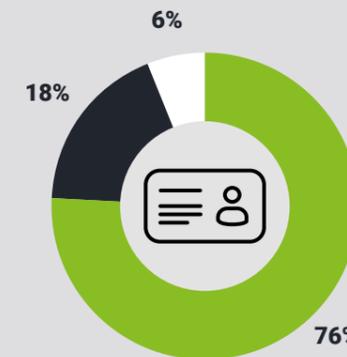


NATIONALITY KEY RESULTS

Does the organisation:

01

Collect data on nationality (country of origin) of employees?

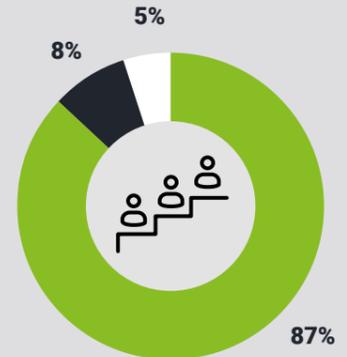


Source Q7.1
Base: All Participants (79)

Yes No Don't know

02

If so, is this data collected at multiple levels (e.g., entry, middle, senior, Leadership Team)?



Source Q7.1
Base: All who collect data on nationality of employees (60)

Yes No Don't know

03



Which nationality is your CEO?

Source Q7.2
Base: All Participants (79)

British	84%
European Non-British	3%
American	1%
Other	6%
Don't know	6%



RECOMMENDATIONS



These individuals often bring cultural insights and expertise from their region, language skills, valuable network and contacts,

DIFFERENT PERSPECTIVES

and ways of doing things which no one else would have.

SHOKU AMIRANI, REVIEW COMMITTEE AND CHAIR OF BBC EMBRACE

NATIONALITY

01

USE DATA TO UNDERSTAND YOUR WORKFORCE

Invest time in learning what different nationalities are represented in your organisation across all levels. Use this insight to understand if you have areas that are a singular nationality and where there is more of a mix.

02

BUST STEREOTYPES AND COMMON MISCONCEPTIONS

Stereotypes often serve as shortcuts for forming impressions of people and guide our decisions, without people being completely aware of it. Spend time opening minds and changing mindsets, by educating your workforce about the different cultures of their colleagues. Encourage people to get to know their colleagues beyond the surface assumptions by learning about their personal as well as work lives. Consider cultural training to immerse teams in the values, norms and subtleties they may not understand.

03

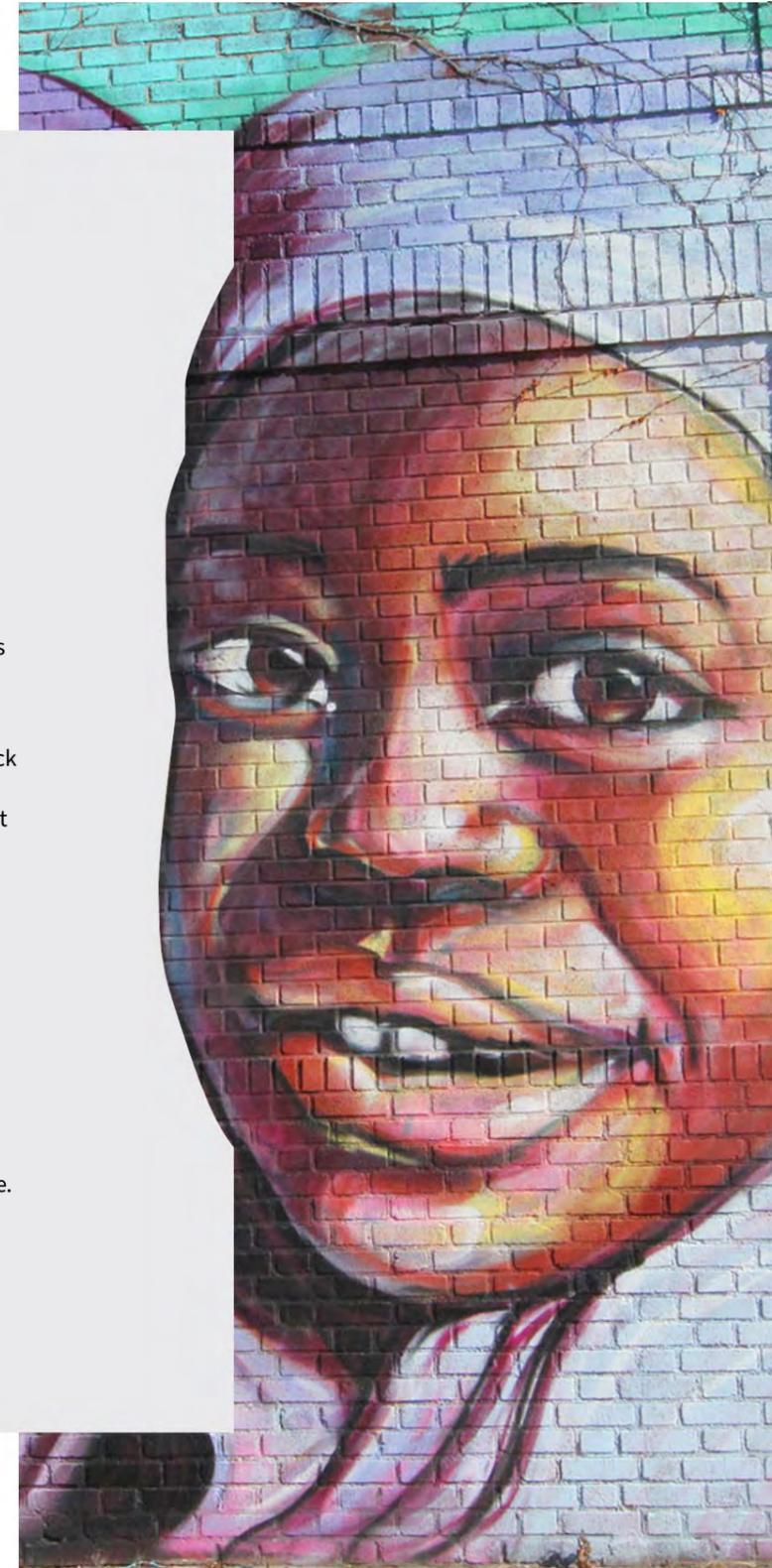
OVERCOME LANGUAGE BARRIERS

A common challenge when working with/alongside different nationalities is language barriers between employees especially, if they have different mother tongues or strong accents. If employees have heavy accents, others might have to ask to hear the same sentence twice, and both parties should feel comfortable with this. Remember to give those speaking a different language than what they were raised on the time and space they need to communicate effectively.

04

BE OPEN TO ALL CULTURES AND THEIR DIFFERENCES

The best way to show your colleagues that you respect and appreciate them is by being open to the traditions and values of all cultures. This means avoiding promoting or embracing only one culture in the workplace. Every culture has its own feelings about work, authority, time and what each person's relationship to the employer or organisation should be. Failing to understand or respect how these cultural priorities, such as time to pray or time with family, affect a team member's lifestyle can lead to an ineffective team.



THE MCKENZIE-DELIS
PACKER REVIEW



CASE STUDY

GLOBAL FUTURE

The global pandemic and the Black Lives Matter movement have acted as x-rays on our societies, exposing deep-seated injustices and systemic racial inequalities.

This report by DIAL Global helps build on our understanding of these challenges by offering insights into our understanding of race in the workplace.

Whilst the report reveals that a majority of British businesses do collect and record data on the nationality of their employees, almost one in five - do not.

There is so much more that needs to be done, not just to track the data on racial balance, but to act on it. Here at Global Future, we know that tackling these social injustices isn't just a moral imperative, it's also a business necessity.

Our Diversity Index report revealed that while diversity on British company boards is increasing, representation from emerging markets is still woefully low, especially in comparison to other countries.

As we seek to rebuild Britain in the wake of Brexit and the Coronavirus, making sure that we hire, promote, track and review the diversity of our boards is essential.

We know that this diversity will help build new trading relationships, break into new markets, innovate and collaborate.

We are proud to partner alongside DIAL Global to make this case for diversity, in the name of both social justice and national economic growth.



In this ever more competitive global landscape, the more diverse your workforce, the better the business results and overall performance. Your employees must

REFLECT YOUR MARKETPLACE AND LOCAL COMMUNITY.

I appreciated this value and ethos at Schlumberger and what it meant to have nationality diversity of over 100+ countries and leadership teams built on multicultural diverse nationalities. This takes time to build and develop and is easier said than done. Commitment from the Board and visible action and results is a clear demonstration to employees, clients and shareholders.

CAMPBELL FITCH, REVIEW COMMITTEE MEMBER, GOVERNOR AT GLASGOW CALEDONIAN UNIVERSITY, NON-EXECUTIVE DIRECTOR AT DIAL GLOBAL



It is certainly encouraging to see the increase in organisations recording data as to the various nationalities that make up their workforce - but understanding this data and using it to improve the organisation is vital. Monitor the information to identify any biases in recruitment but organisations can also use this data to educate their organisations by encouraging

TRUE INTEGRATION

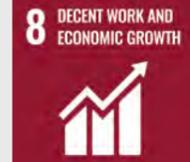
and celebrating the various cultures and heritages of their teams, thereby enhancing their social responsibility.

RUPINDER BAINS, REVIEW COMMITTEE MEMBER, BOARD MEMBER OF THE FOOTBALL ASSOCIATION & MANAGING DIRECTOR OF PINDER REAUX SOLICITORS



At The Youth Group, data on nationality is being collected at multiple levels (e.g., entry, middle, senior, leadership team) and we believe that any nationality can 'make-it'. Today's wifi and remote technology means that you can hire people from around the world who can contribute to your team's growth and success. We want to ensure as many people have access to huge and exciting opportunities which turns this gloomy world focussed on a deadly virus into a thrilling world focussed on overcoming the barriers in life.

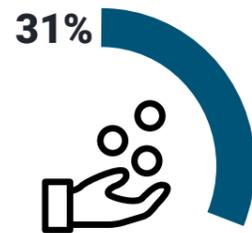
JACK PARSONS, REVIEW COMMITTEE MEMBER, CHIEF EXECUTIVE OFFICER OF THE YOUTH GROUP



THE MCKENZIE-DELIS PACKER REVIEW

SOCIOECONOMIC STATUS

Which of the following does the organisation's strategy on Leadership Team diversity specifically mention?



All participating organisations with a Leadership Team Diversity Strategy (51). LT Definition: Executive committees + the leaders who report into the exec committee

Successful companies are always looking to attract and retain the best people. Socioeconomic diversity is an acquired diversity where socioeconomic factors encompass an individual's education, financial situation and occupation. Like many other forms of bias in the workplace, socioeconomic bias means that less advantaged individuals must overcome obstacles in order to progress in their careers. Socioeconomic bias can affect the hiring process, promotion ladder and workplace culture fit, and it is paramount that effort is made to proactively tackle these biases in workplace systems.

Benefits of socioeconomic diversity

A more socioeconomically diverse workforce from entry level to C-suite positions can help companies benefit from the wide range of experiences and perspectives employees bring. A study on how social class influences strategic choices showed that CEOs who were born socioeconomically disadvantaged have increased risk-taking sensibilities that can help their companies become more successful.¹ Despite this, a staggering 48% of FTSE 350 CEOs educated in the UK attended independent schools, which is a stark contrast to the 7% of the general population who attended independent schools.²

Today, creating a more socioeconomic diverse workforce must become a priority for UK companies. Social mobility in the UK has stagnated in recent years and there has been little improvement in closing the opportunity gap between those who were born privileged and those who were born disadvantaged.³

What can companies do?

One way employers can practise more inclusive hiring is to use contextual recruitment tools to support candidates from underperforming schools and less advantaged backgrounds; this accounts for the challenges that these candidates have continuously overcome in order to access career opportunities.⁴ It is important to consider socioeconomic diversity in the hiring process because it encompasses individuals who encounter similar barriers in career progression as those who experience gender and ethnic bias for example.⁵ Contextual recruitment tools can help employers identify hidden talent, and levels the playing field for applicants regardless of their background and income.

Effects of COVID-19 on social mobility

The COVID-19 lockdown has further exacerbated social mobility problems in the UK and disproportionately affected the job

security of workers from the lowest-income regions. Of the 24% of UK workers whose jobs were at risk, 23% to 29% were from the 20 lowest-income regions compared to the lower 18% to 25% of those from the 20 highest-income regions.⁶

It is vital that these social disparities are addressed as organisations look to bounce back from the impacts of the pandemic. By fostering a socioeconomically diverse environment, employers can better access and retain new talent pools and bring in different expertise and perspectives into the workplace. This can help organisations be more innovative and agile while promoting a diverse approach to problem solving and future-proofing.⁷

“there is an urgent need to provide alternative routes into work and opportunities to **LEARN AND DEVELOP** in the workplace.”

ANDREW ALLNER, REVIEW COMMITTEE MEMBER, NON-EXECUTIVE CHAIRMAN OF SIG PLC, SHEPHERD BUILDING GROUP LIMITED AND FOX MARBLE HOLDINGS PLC

1. You Don't Forget Your Roots: The Influence of CEO Social Class Background on Strategic Risk Taking, AMJ, 58(6), 1614-1636, 2014
2. Elitist Britain, The Sutton Trust & Social Mobility Commission, 2019
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4. upReach Launches New Recruitment Tool Encouraging Employers To Consider Contextualised A-Level Grades, upReach, 2017
5. Why Companies Should Add Class To Their Diversity Discussions, HBR, 2018
6. COVID-19 In The United Kingdom: Assessing Jobs At Risk And The Impact On People And Places, McKinsey & Company, 2020
7. Helping Employers Increase Socio-economic Diversity And Inclusion, Social Mobility Commission, 2020



upReach

RESEARCH PARTNER

upReach

upReach is a Social Mobility Charity, dedicated to supporting students from less-advantaged backgrounds to secure top jobs. Many employers partner with upReach to improve the socio-economic diversity of their workforce, or to support their wider diversity and corporate social responsibility objectives.



SOCIOECONOMIC STATUS KEY FINDINGS



Our data shows that while **nearly half (49%)** of participating organisations actively promote entry-level roles to young people from under-represented backgrounds, just one in five (19%) currently use contextual recruitment practices to support applicants from underperforming schools and less advantaged backgrounds. Participating organisations are not using, or do not know if they use, the Relative Education Attainment Level (REAL) contextual recruitment tool presenting an opportunity to raise awareness of the tool and how it works to guide organisations during recruitment processes.



Just one in ten (11%) of participating organisations currently collect and monitor data on socioeconomic background.

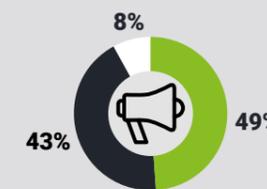


SOCIOECONOMIC STATUS KEY RESULTS

Does the following apply to the organisation:

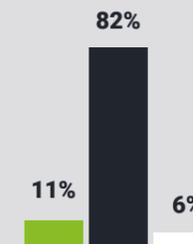
01

Are Internships and entry level positions actively promoted to young people from under-represented backgrounds?



Source Q4.1
Base: All Participants (79)

Does the organisation collect and monitor data on socio-economic background of employees? (parental qualifications, type of school attended, eligibility for free school meals).



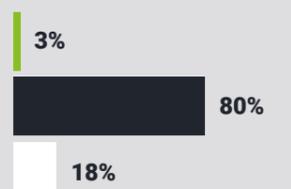
Source Q4.1
Base: All Participants (79)

Does the organisation use contextual recruitment practices to support applicants from underperforming schools and less advantaged backgrounds?



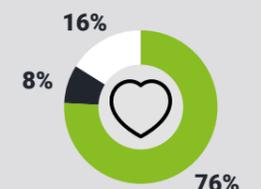
Source Q4.1
Base: All Participants (79)

Does the organisation use the Relative Education Attainment Level (REAL) contextual recruitment tool?



Source Q4.1
Base: All Participants (79)

Would the organisation be interested in learning about the work of upReach, a charity which works to improve social mobility by creating the conditions for undergraduates from less advantaged backgrounds to access and sustain top graduate jobs?



Source Q4.1
Base: All Participants (79)

Yes No Don't know

02



Which of the following type of university did your CEO attend for their undergraduate degree?

Source Q4.2
Base: All Participants (79)

Oxbridge	18%
Russell Group	14%
UK Non-Russell Group	15%
Non-UK University	9%
They did not attend university	10%
Don't know	34%



RECOMMENDATIONS



For government, businesses and other organisations this requires a step change in the commitment to apprenticeships, vocational training, and training in the

**SKILLS
REQUIRED FOR
TOMORROW'S
WORLD**

ANDREW ALLNER, REVIEW COMMITTEE MEMBER, NON-EXECUTIVE CHAIRMAN OF SIG PLC, SHEPHERD BUILDING GROUP LIMITED AND FOX MARBLE HOLDINGS PLC

SOCIOECONOMIC STATUS

01

BOARD ADVOCACY

This is effective in breaking down the taboo that comes with people who have had different upbringings and the negative stereotypes people may have relating to social and economic factors, such as income, education, employment, community or housing. Asking a senior leader to speak out or share a personal story relating to privilege or their specific upbringing can inspire others and help break down barriers associated with socioeconomic factors. It also has the effect of allowing others to feel safe to share their own stories and experiences and feel proud of their background regardless of where they have come from.

02

COLLABORATE WITH YOUR LOCAL AND GLOBAL COMMUNITY

Finding a social cause that your people care about and that benefits the local community and/or the global community and that is aligned to your business is a win-win situation and a great way to give back, educate and inspire positive action within your workforce. For example, your company may wish to visit emerging communities around the country to see

how the geographic, socioeconomic and educational and cultural barriers may hinder prosperity. You may then be able to uncover ways in which your core business offering could offer or collaborate to find solutions to some of these societal issues.

03

LOOK AT THE UN SUSTAINABLE DEVELOPMENT GOALS (SDGS)

We have featured many of the 17 UNSDGs throughout this report and looked at how our ten facets of Diversity, Inclusion and Belonging are related. The UNSDG framework is a great place to begin your personal journey into tackling the most pressing societal issues from ending poverty through to reducing plastic and saving our planet. The UN has called upon businesses to do their part in achieving these collective goals and there are plenty to choose from that can be tailored to your specific business.

04

BE CLEAR ABOUT YOUR OBJECTIVES

Once you have determined the social causes that your organisation would

like to support ensure you are clear and measured about the achievements you wish to make. You should also consider the business goals you wish to achieve that can support or collaborate with socioeconomic objectives. For example, innovation or inclusivity programmes developed in collaboration with an external partner that supports your drive to become a more attractive employer to diverse individuals or a more sustainable organisation.

05

CREATE A REVERSE MENTORING SCHEME

Reverse mentoring schemes are a pairing between two individuals in an organisation at different levels and with differing experiences. The two should be paired because of their unique experiences with the idea being that they learn from one another in a mutually beneficial way. Benefits can include: exchanging of skills, development of relationships, breaking down barriers that may have traditionally promoted the "us vs them" culture, developing networks and better understanding of other backgrounds and experiences across the diversity, inclusion and belonging spectrum.



THE MCKENZIE-DELIS
PACKER REVIEW

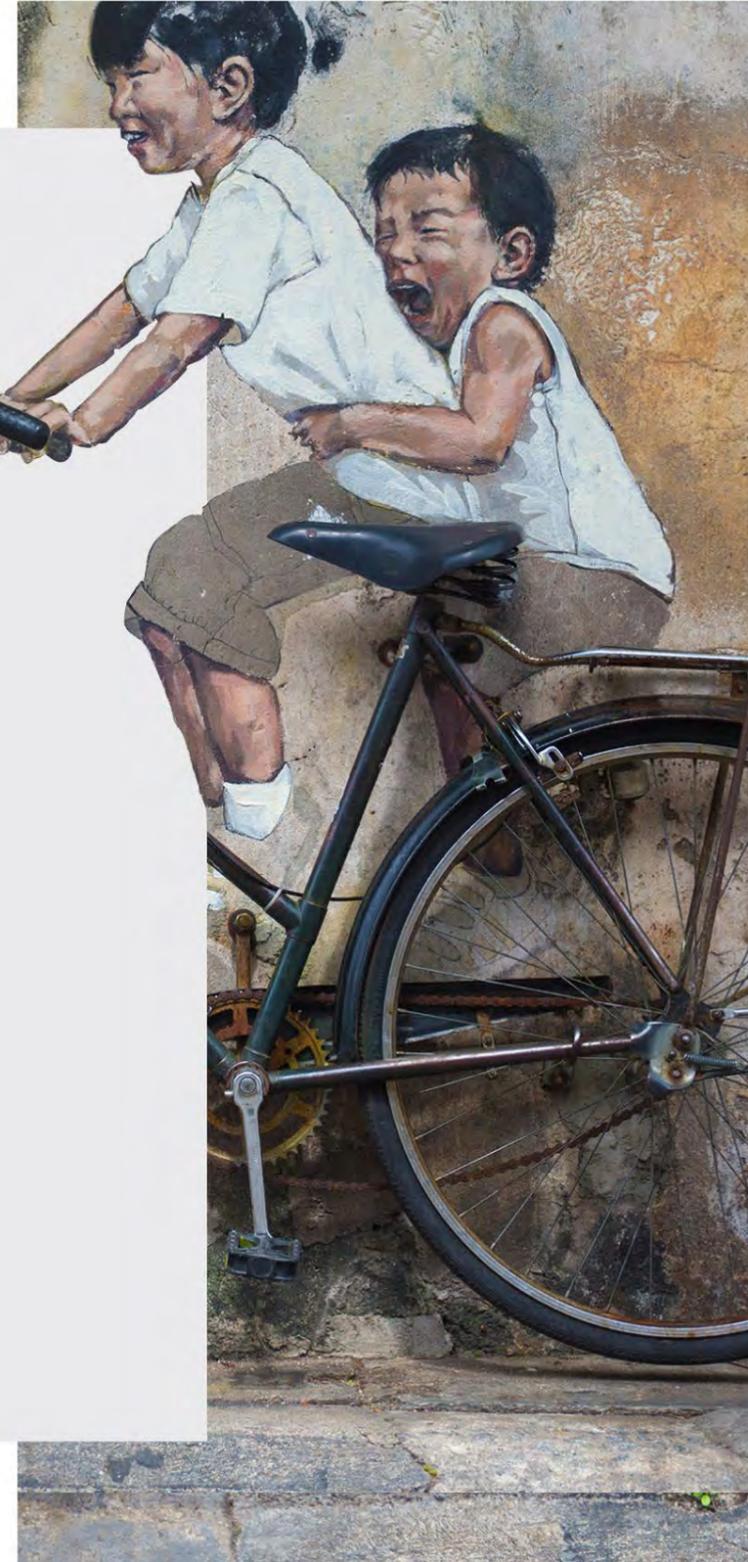


ST. JAMES'S PLACE
WEALTH MANAGEMENT

CASE STUDY

ST. JAMES'S PLACE

St. James's Place runs a nation-wide financial education programme for UK schools and organisations as part of its cross-departmental Social Mobility Strategy.



We educate students of all ages on budgeting, managing money and building financial confidence with engagement across the full company community, from employee volunteers to qualified advisers. Recently, one of our Executive Board members presented to students from the Aleto Foundation on financial literacy. As an extension of this programme, we also delivered career insight days and interactive workshops on CV writing and interview/assessment centre preparation to give young people more experience and confidence to enter the workforce.

We have partnered with local Special Educational Needs and Disability Schools, the Department for Work and Pensions and charitable organisations such as upReach in order to help disadvantaged students realise their full potential. This year we are hosting our first virtual work experience week to ensure students can still access first-hand experience, of both corporate work and the financial industry and in the process, break down some of the misconceptions that exist.

To address industry barriers in the Early Careers space, we use a contextualised recruitment system called RARE. The system measures candidates' achievements alongside their qualifications, giving us deeper insights to make informed decisions whilst understanding individual's backgrounds to help us equalise opportunity.



Having a socioeconomically diverse workforce and leadership team would bring innovation, a culmination of differing life experiences and a fresh new talent pool. This has been missed off far too many D&I strategies and reviews until now. COVID-19 has brought forward the issues related to addressing socioeconomic bias and access to further study, training and employment opportunities.

RUPINDER BAINS, REVIEW COMMITTEE MEMBER, BOARD MEMBER OF THE FOOTBALL ASSOCIATION & MANAGING DIRECTOR OF PINDER REAUX SOLICITORS



The most surprising result of the survey related to collection of data. Measuring socio-economic diversity can be difficult, particularly as there is no perfect single indicator. But without data at an organisation-level, the problem is hidden from decision makers, resulting in inaction.

HIGH POTENTIAL STUDENTS

from disadvantaged backgrounds often have inferior professional networks, work experience opportunities or career advice. They often don't know many professional careers exist let alone how to access them. It is encouraging that 49% of organisations are now actively promoting opportunities to under-represented groups, and that a growing proportion (18%) are using contextual recruitment solutions such as upReach's REALrating to identify hidden talent.

JOHN CRAVEN, REVIEW COMMITTEE AND CEO OF UPREACH

NEVER GIVE UP



I am becoming increasingly concerned about the number of young people coming out of less regarded universities with degrees that have little relevance to future employment whilst saddled with substantial debt that may never be repaid. For these students and others who are not academic or have not had the benefit of effective schooling, often from poorer backgrounds, there is an urgent need to provide alternative routes into work and opportunities to learn and develop in the workplace.

For government, businesses and other organisations this requires a step change in the

COMMITMENT TO APPRENTICESHIPS,

vocational training, and training in the skills required for tomorrow's world. It also requires additional resource within organisations to assess potential rather than achievement in the recruitment process and to provide support and development opportunities to new employees so they can become securely established in work.

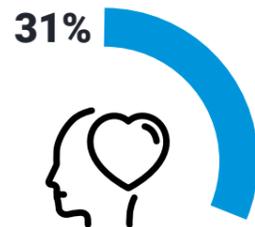
ANDREW ALLNER, REVIEW COMMITTEE MEMBER, NON-EXECUTIVE CHAIRMAN OF SIG PLC, SHEPHERD BUILDING GROUP LIMITED AND FOX MARBLE HOLDINGS PLC



THE MCKENZIE-DELIS PACKER REVIEW

MENTAL HEALTH

Which of the following does the organisation's strategy on Leadership Team diversity specifically mention?



All participating organisations with a Leadership Team Diversity Strategy (51). LT Definition: Executive committees + the leaders who report into the exec committee

One in six people report experiencing a common mental health problem in any week, and one in four experience it in any given year.¹ A recent survey found that one in five people have gone to work while having suicidal thoughts or feelings.² Over 6,000 people die a year due to suicide in the UK, and mental health may reduce someone's life expectancy by as many as 21 years due to the associated physical health problems.² The cumulative value added to the economy by people who are at work and have or have had mental health problems is £225 billion per year, which represents 12.1% of the UK's total GDP.² However, one in three FTSE 100 companies did not mention wellbeing in their annual 2016 report and almost three in four did not mention mental health at all.³

Workplace stigma

A recent survey conducted revealed that 38% of British workers felt unable to talk openly about a mental health problem at work for fear that it would affect their job prospects or job security.⁴ They found that 17% said they were worried they would face negative judgement from colleagues with a further 11% being victims of abuse as a direct response to a mental health issue. Alongside this, 59% said their workplace could make improvements to current systems and attitudes to take the mental health of workers more seriously and 65% of managers felt that taking time off due to physical illness or injury is treated more seriously than taking time off to improve mental health.⁴

The cost of mental ill-health

Work can be beneficial to an individual's wellbeing, however, a negative working environment can be damaging to both physical and mental health. This can be caused by increased stress, poor communication at work, low control over one's area of work, low levels of support for employees, inflexible work hours, and unclear work objectives. Additionally, bullying and harassment are commonly reported as causes of work-related stress by workers and present risks to the health of workers.⁵ These health consequences come at a large cost to the company in terms of productivity and increased staff

turnover. In fact, addressing wellbeing at work is thought to increase productivity by as much as 12%.² In total, 70 million workdays are lost each year due to mental health problems in the UK, costing employers up to £45 billion a year.⁶ However, the annual cost of mental illness to the UK economy is much more and has been estimated to be a staggering £74-99 billion.⁷

Mental health in the current climate

COVID-19 has had, and is having, impact on businesses, the economy and society as a whole. This has resulted in a sharp rise in reported mental health problems. A report suggested that mental ill-health has increased 8.1% as a direct result of the COVID-19 pandemic.⁸ Early estimates are that half a million people are likely to experience mental health problems as a result of the economic impact of the pandemic. For this reason alone, the focus of organisations on the implementation of non-discriminatory policies and mental wellbeing support systems should continue as we move into the next phase of the pandemic.

1. How Common Are Mental Health Problems?, Mind, 2020
2. <https://www.mentalhealth.org.uk/sites/default/files/how-to-support-mental-health-at-work.pdf>
3. Report: Mental Health And Wellbeing: FTSE 100 Report 2017, Reward And Employee Benefits Association, 2017
4. 38% Of Brits Fear Revealing A Mental Health Problem At Work Would Jeopardise Their Career, Mental Health Foundation, 2017
5. Mental Health In The Workplace, World Health Organization, 2019
6. Poor Mental Health Costs UK Employers up to £45 Billion a year, Deloitte, 2020
7. <https://www.mentalhealth.org.uk/sites/default/files/workplace-seminar-scotland.pdf>
8. The Mental Health Effects of the First Two Months of Lockdown and Social Distancing during the COVID-19 Pandemic in the UK, Institute for Fiscal Studies, 2020
9. <https://www.mentalhealth.org.uk/coronavirus/divergence-mental-health-experiences-during-pandemic>



RESEARCH PARTNER

Minds at Work

Minds at Work is a community-led charity which works to inspire and equip organisations to eradicate the stigma of mental illness and create a healthier working world.



MENTAL HEALTH KEY FINDINGS



Nine in ten participating organisations recognise the importance of employee mental health in business success, with 92% agreeing with this statement.



Eight in ten participating organisations (81%) agree that they have a strong mental health strategy/plan for all employees which includes tackling stigma, and nearly nine in ten (87%) provide mental health training. Seven in ten (70%) participating organisations agree that the organisation tracks and monitors absence, presenteeism and leavism to understand the impact of mental health, wellbeing and mental illness on individuals and the organisation.



Just over six in ten (63%) organisations agree that their leaders speak openly about their lived experience of mental health conditions



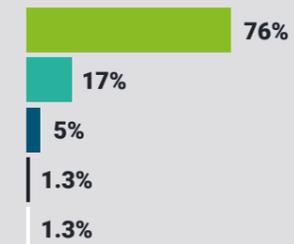
MENTAL HEALTH KEY RESULTS

To what extent, if at all, do you agree or disagree with the following statements as they relate to the organisation?

01

The organisation recognises the importance of employee mental health in business success.

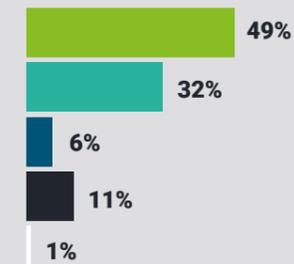
Source Q9.1
Base: All Participants (79)



02

The organisation has a strong mental health strategy/plan for all employees which includes tackling stigma.

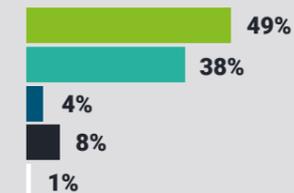
Source Q9.1
Base: All Participants (79)



03

The organisation provides mental health training.

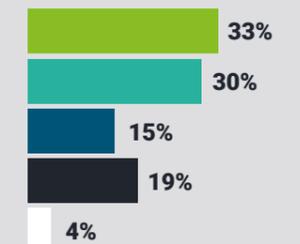
Source Q9.1
Base: All Participants (79)



04

Leaders within the organisation speak openly about their lived experience of mental health conditions.

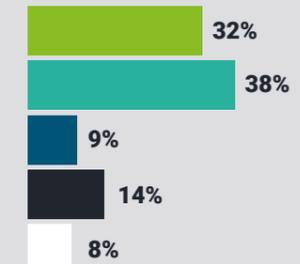
Source Q9.1
Base: All Participants (79)



05

The organisation tracks and monitors absence, presenteeism, and leavism to understand the impact of mental health, wellbeing and mental illness on individuals and the organisation.

Source Q9.1
Base: All Participants (79)



Strongly agree Somewhat agree Neither agree nor disagree Disagree Don't know



RECOMMENDATIONS



it is important individuals feel that it is

ABSOLUTELY SAFE

to have conversations about mental health.

GEOFF MCDONALD, CO-FOUNDER OF MINDS@WORK

MENTAL HEALTH

01

LEADERSHIP ROLE MODELS

This is effective in breaking down this taboo. Asking a senior leader to speak out or share a personal story relating to mental health can inspire others and help break down barriers. It also has the effect of allowing others to feel safe to share their own stories and experiences.

02

ENSURE ACCESS TO RESOURCES AND CONFIDENTIAL SUPPORT

These should be visible and promoted internally and externally to reinforce the organisation's intentions when it comes to mental health. Internal or external workshops and webinars delivered by experienced and qualified mental health professionals can educate and engage staff. Sessions could range from how to manage anxiety, stress or depression to how to support others through bereavement.

03

MENTAL HEALTH AND WELLNESS TRAINING

Invest the time and resources by upskilling mental health and wellness champions within the workforce. Mental health first aid is a good place to start as it teaches people how to identify, understand and support a person who may be starting to develop issues, thus potentially eliminating them later on down the line.

04

SUPPORT AWARENESS EVENTS IN THE CALENDAR

Supporting well known initiatives such as World Mental Health Day is a great way to show interest to improve mental health and wellness at work. Campaigns such as these often allow further access to resources such as tools, marketing and banners to support your organisation's initiatives.



THE MCKENZIE-DELIS
PACKER REVIEW

studio
RETAIL LTD

CASE STUDY

STUDIO RETAIL LIMITED

In 2019, Studio partnered with AdviserPlus Learning Solutions, who facilitated workshops over a period of six months.

These started with continuous Mental Health (MH) Awareness sessions for the Executive team and every line manager in Studio. Managers were supported to develop their knowledge of the prevalence of mental health conditions and in how to spot the early signs of mental distress.

They were given tools to help them to have the right conversations and to signpost team members to appropriate support where necessary.

Recognising the importance of in-the-moment support for colleagues, Studio Retail also engaged AdviserPlus to train two cohorts of accredited Mental Health First Aiders who provide additional points of contact within Studio and are taught a deeper knowledge of mental health conditions.

AdviserPlus have given Studio Retail support and advice on how to maintain momentum in the area of good mental health and I believe Studio is leading the way in terms of open and honest discussions and real support for staff – led by Executive stakeholders who are committed to promoting the right culture.



I have hosted two Mental Health Forums over the last 3 months with over 35 colleagues attending each. Colleagues have found the forums to be a safe place to talk and share individual stories. Following on from one MH Awareness session, a manager was able to identify when a colleague was in serious distress when they had become unreachable. They used the knowledge they had gained from the case studies worked through in the awareness sessions and contacted emergency services. As a result, it was likely that a life was saved.

COLLETTE KING, DIRECTOR OF
HR AT STUDIO RETAIL



REMENT
DIFFERENT
THINK

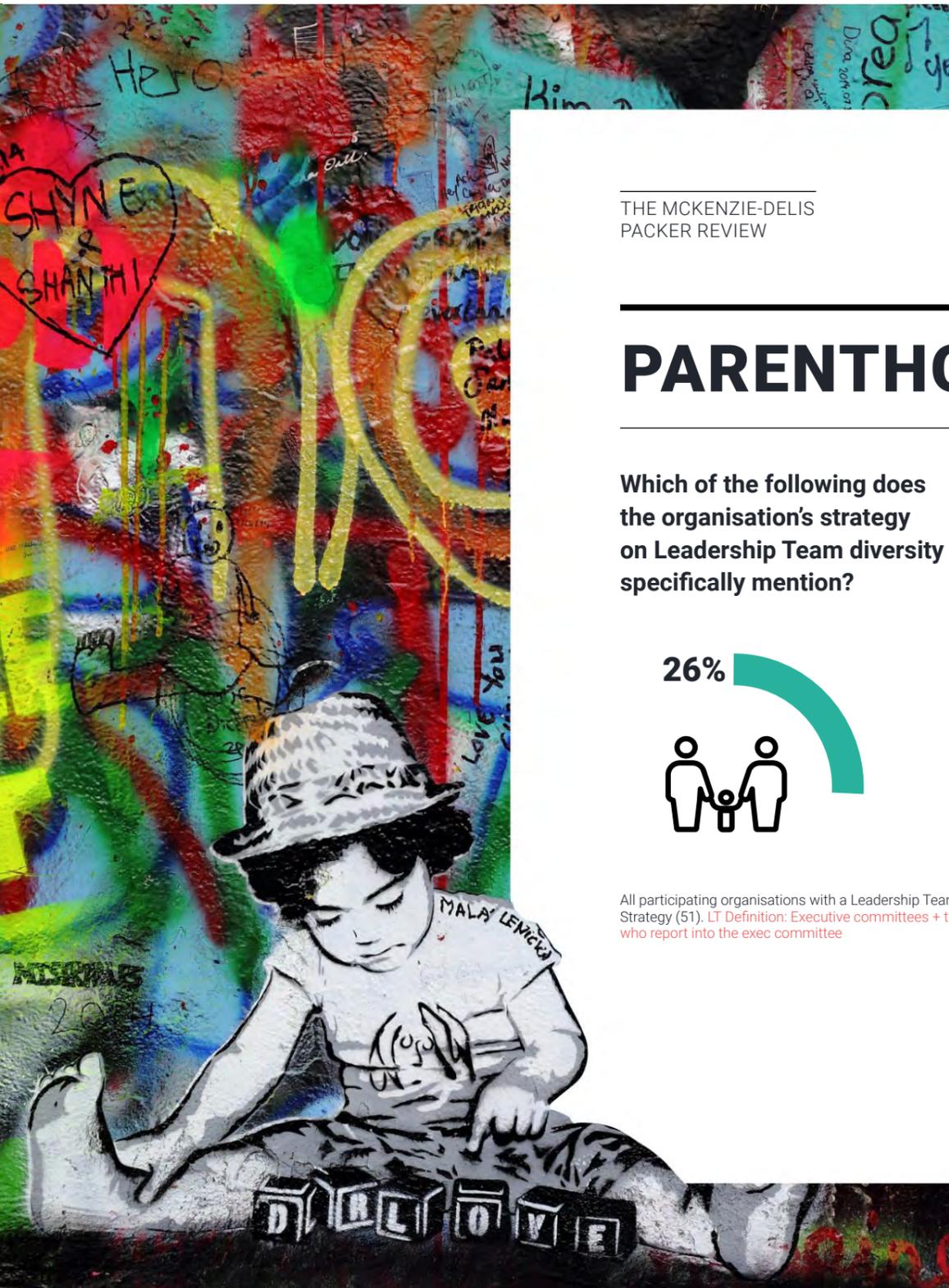
“

The data shows that participating organisations have begun to address mental health stigma, however, some of these initiatives such as providing mental health training must not only be a tickbox policy. While the support systems may be in place, it is important individuals feel that it is absolutely safe to have conversations about mental health. In addition, It is important that organisations consider how safety is measured and how impact is measured, for example, there could be improvement in organisations measuring absenteeism, presenteeism and leavism to

UNDERSTAND
THE IMPACT OF
MENTAL HEALTH,

wellbeing and mental illness on individuals and the organisation. To achieve real culture change, a key driver is leaders sharing their stories in order to create a psychologically safe environment. We must also acknowledge that the organisations surveyed are not representative of smaller businesses and as such, much needs to be done to ensure that organisations, big or small, address mental health.

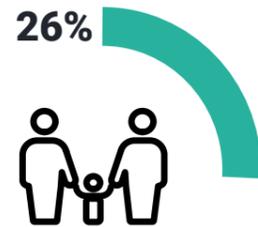
NANCY KELLEY, REVIEW COMMITTEE MEMBER, CHIEF EXECUTIVE OFFICER OF STONEWALL



THE MCKENZIE-DELIS PACKER REVIEW

PARENTHOOD

Which of the following does the organisation's strategy on Leadership Team diversity specifically mention?



All participating organisations with a Leadership Team Diversity Strategy (51). LT Definition: Executive committees + the leaders who report into the exec committee

As the demands of the modern worker change, organisations are introducing more work-life integration policies in order to adapt to changing employee needs. When looking at the UK specifically, the country is the fourth lowest out of 31 European countries in terms of family-friendly policies,¹ with only 1% of new parents taking shared parental leave in 2017-2018² and only 23 companies across the FTSE 100 provide clear policies about parental leave options on their website.³ Keeping these policies hidden has a negative impact on those looking to return to work, switch jobs, and on hiring and recruiting new employees.³

The need for work-life policies for everyone

Employees of the future are facing an increasing need to balance their multifaceted lives, with 50% of all UK households with dependent children having two full-time working parents.⁴ With only 4% of businesses providing policies on paternity, men are demanding improvements on parental leave policies.⁴ In the UK, both paid leave for fathers and average payment rate for father-specific leave is below the OECD average.⁵ On the other hand, paid leave for mothers is the most widely implemented family-friendly policy in the workplace, yet the duration and remuneration fall far below UNICEF policy recommendations.⁶ Over 50% of surveyed companies do not meet the maternity leave provision of 18 weeks,⁶ despite the clear organisational benefits. Providing women with postnatal security and/or maternity leave reduces their likelihood of quitting their job prior to birth, and in the longer term results in greater commitment and loyalty.⁵

Providing both male and female parents equal access to parental leave policies is essential to driving gender equality in the workplace, and allowing both men and women to lead productive personal and professional lives. Making paternity leave a legal obligation would create a better work-life balance, increase employee engagement and improve gender equality and diversity in the workplace.⁶ When HR managers perceive that their company is adopting important work-life policies, they are also likely to interpret this as a commitment to gender equality, and strive for this in the workplace.⁷ The adoption of family-friendly policies by organisations also supports the integration of women into the labour force, and reduces gender gaps in wages and working hours.⁷ Findings show that the wage gap is smaller in organisations where work-life policies are available, not only because women in these organisations are earning more, but also because men are earning less.⁷

Supporting parents of the future

Family-friendly policies are particularly relevant as a "sandwich generation" has emerged,⁸ composed of employees who are caring for their children as well as their parents. It is predicted that by 2050, there will be three times more people of working age looking after two billion aging family members,⁸ which is increasing employee demand for flexible work arrangements. In the UK, around 38% of mothers from 2017-2018 with infants would have liked to make use of flexible working practices, but did not request to do so due to worries of being perceived negatively by employers.⁹ As the definition and gender composition of families evolve, companies need to redefine and alter their policies to ensure inclusivity of all parents. The UK ranks third place globally in terms of the percentage of organisations in the country providing adoption leave above the statutory requirements.¹⁰ As employers review their parental leave policies, many organisations are offering time off to parents of adopted children, with adoption leave and paternity leave becoming more prevalent.¹⁰ When looking at how companies handle adoption leave for same sex couples, 89% of companies indicated that leave is treated in the same manner as opposite-sex couples.¹⁰ In order to attract and retain global and diverse talent, organisations must improve and update their parental leave policies, and stay up-to-date with local statutory benefits.

Flexible working arrangements in COVID-19

COVID-19 has accelerated the large-scale adoption of remote working, which has given parents more flexibility. Remote working can improve firm performance by increasing worker satisfaction as work-life balance improves, absenteeism decreases and employees are able to do more focused work around their own schedules.¹¹ Providing flexibility to both parents and general employees also gives employees the ability to harness the power of technology in a way that suits them, as well as improve the agility of the team, and the productivity gains of a workforce.

1. Are the World's Richest Countries Family Friendly?, UNICEF, 2019
2. Shared Parental Leave: Why is Take Up so Low and What Can be Done?, University of Birmingham, 2018
3. Companies Who Publish Their Parental Leave Policies, Mumsnet, 2019
4. Take Action, Gain Traction: Inclusion And Diversity In The UK Workplace, Bain, 2019
5. Paid Parental Leave: Lessons from OECD Countries and Selected U.S. States, OECD Publishing, 2015
6. Family-Friendly Policies: A Global Survey of Business Policy, UNICEF, 2020
7. Organizational Work-Life Policies and the Gender Wage Gap in European Workplaces, Work and Occupations, 2019
8. The Sandwich Generation, Edward Elgar Publishing, 2017
9. Be Flexible! OECD, 2016
10. Global Parental Leave Report, Mercer, 2018
11. Productivity Gains From Teleworking In The Post COVID-19 Era: How Can Public Policies Make It Happen? OECD, 2020



RESEARCH PARTNER

Power of the Parent

Power of the Parent works with businesses to support parents returning to work through strengths-based coaching and development.



PARENTHOOD KEY FINDINGS



Nine in ten (92%) of participating organisations recognise the benefits of having parents in the workforce. 84% agree there is value in helping parents prepare for, and return from, parental leave. Just over half (54%) of participating organisations go further - providing formal support for someone returning from parental leave (such as coaching and mentoring).



In participating organisations there is a small gender gap around uplifts in statutory parental pay with 74% of participating organisations stating they offer an uplift on statutory maternity pay, but **only 61%** stating the same for paternity pay and **61%** for adoption pay. Only six in ten (58%) of participating organisations actually externally publicise their policy offers around maternity, paternity, adoption and shared parental leave. Internal publication must be better as more than four in five (85%) agree that parents in their workforce know what is on offer to support them in combining work and family life.



Fewer than one in five (17%) of participating organisations agree that the workforce think their careers could stall if they have children while working for the organisation.

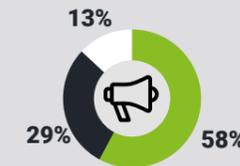


PARENTHOOD KEY RESULTS

Does the organisation:

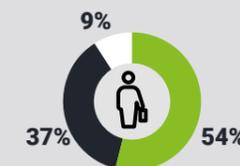
01

Externally publicise their offer to parents around maternity, adoption, shared parental and paternity leave?



Source Q10.1
Base: All Participants (79)

Provide formal support for someone returning from parental leave (for example, coaching, returner workshops, mentoring)?



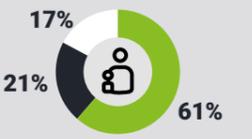
Source Q10.1
Base: All Participants (79)

Offer an uplift on statutory maternity pay?



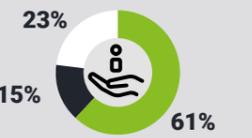
Source Q10.1
Base: All Participants (79)

Offer an uplift on statutory paternity pay?



Source Q10.1
Base: All Participants (79)

Offer an uplift on statutory adoption pay?



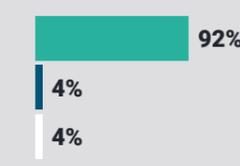
Source Q10.1
Base: All Participants (79)

Yes No Don't know

To what extent, if at all, do you agree or disagree with the following statements?

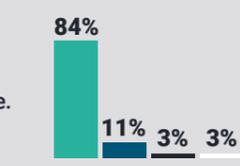
02

The organisation recognises the benefits of having parents in the workforce.



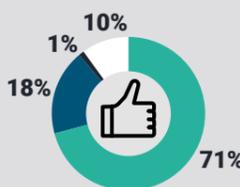
Source Q10.2
Base: All Participants (79)

The organisation thinks there is value in helping parents prepare for, and return from, parental leave.



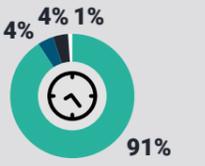
Source Q10.2
Base: All Participants (79)

Line managers feel equipped to be able to support team members who are expecting a child or returning from parental leave.



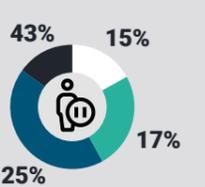
Source Q10.2
Base: All Participants (79)

The organisation recognises that flexible working isn't just for parents.



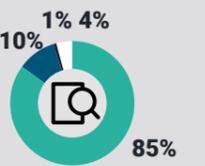
Source Q10.2
Base: All Participants (79)

The workforce feel that their career could stall if they have children while they work here.



Source Q10.2. Base: All Participants (79). LT Definition: Executive committees + the leaders who report into the exec committee

Parents in the workforce know what is on offer to support them in combining work and family life.



Source Q10.2
Base: All Participants (79)

Agree Neither agree nor disagree Disagree Don't know



RECOMMENDATIONS



One thing that COVID-19 has brought into sharp focus for organisations is that parenthood is a

DEMANDING JOB in itself.

DEBBIE HEWITT MBE, REVIEW COMMITTEE MEMBER, PLURAL NON-EXECUTIVE CHAIRMAN OF VISA EUROPE, BGL GROUP, WHITE STUFF, RESTAURANT GROUP

PARENTHOOD

01

COMMIT TO FLEXIBILITY

the best way to help parents and carers at your workplace is allowing them to work a flexible schedule. Add flexible working to job adverts so people know that it will be considered or is part of the role. Flexibility could include flexible work-from-home days, work hours outside the typical nine-to-five, and opportunities for remote work.

02

CREATE A TRANSPARENT AND EMPATHETIC CULTURE

Knowing you have permission to work flexible hours and actually feeling like you can do it is another issue entirely. Clarifying to your whole company how employees can use benefits will help everyone feel more comfortable and appreciate having them in place, including employees without children who plan to raise them in the future.

03

IMPROVE YOUR PARENTAL LEAVE PROGRAMS

Review and enhance your parental leave and pay offer, including Paternity Leave and Shared Parental Leave, to give parents choice. Provide clear and easy to understand information on your parental leave and pay policy, and the support available on your internal and external websites. Encourage fathers to take Paternity Leave and Shared Parental Leave, and support them to take their full entitlement of leave.

04

ROLE MODEL BEHAVIOUR FROM THE TOP

Ensure leaders are 'work-life-friendly' role models for employees. If managers in your company are responding to emails while on holiday, it sends a message to employees that they are expected to do so as well. Be sure to respect the balance and privacy of your employees and avoid contacting them after normal work hours.



One thing that Covid has brought into sharp focus for organisations is that parenthood is a demanding job in itself and that it comes in all shapes and sizes, not just the obvious nuclear family. The most enlightened organisations will understand that adapting their workplace and working practices to the particular demands of working parents, male and female, young and old, will enable them to access, recruit and retain the broadest pool of talent.

DEBBIE HEWITT MBE, REVIEW COMMITTEE MEMBER, PLURAL NON-EXECUTIVE CHAIRMAN OF VISA EUROPE, BGL GROUP, WHITE STUFF, RESTAURANT GROUP



The recognition and support for parents presented in the results is a testament to the actions organisations are taking to be both transparent and proactive in ensuring parents both feel valued and able to have a successful career - something which is imperative for KPMG. Earlier this year, I supported the launch of the University of Birmingham's Fathers' in the Workplace toolkit. In addition, our Empowering Parents programme offers 360 support to mothers, fathers and all types of carers.

ANNA PURCHAS, PARTNER, UK HEAD OF PEOPLE AT KPMG



58% of participating organisations are already sharing externally what their parental leave offering is for employees - a key communication in attracting talent and promoting an open culture that is supportive of families.

CHARLOTTE SPEAK, FOUNDER OF POWER OF THE PARENT



It is a troubling combination having the UK rank lowest out of 31 countries for family-friendly policies when half of all UK households with dependent children have two full-time working parents - and this has been further exacerbated by a global pandemic. In turn, working in lockdown we've seen how technology can maintain strong levels of productivity, despite remote working for both working parents. As such, for some organisations, it's clear more needs to be done to ensure their work

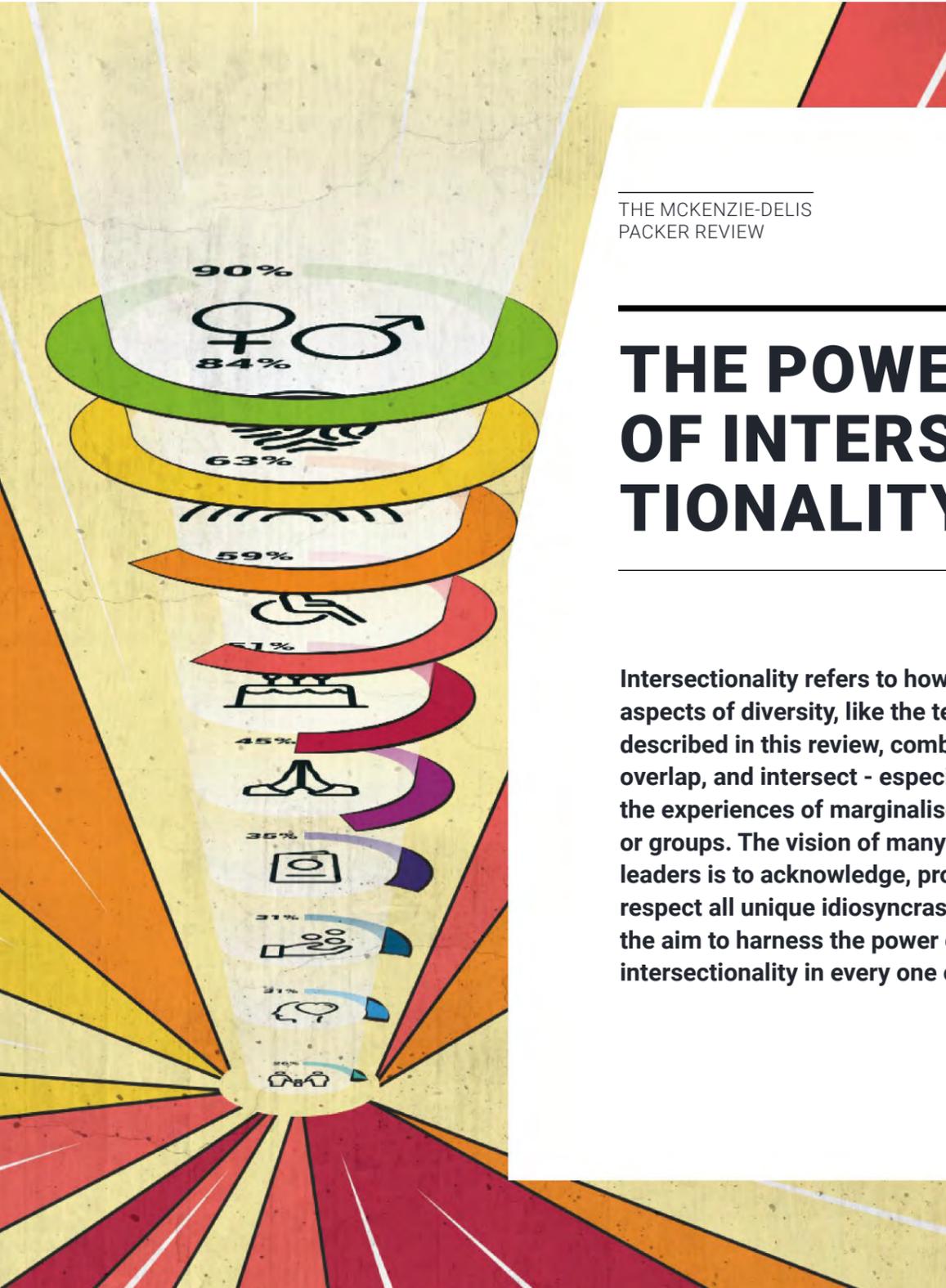
CULTURE MATCHES THE FLEXIBILITY TECHNOLOGY HAS PROVIDED FOR PARENTS.

It not only makes, it's also the right thing to do. As a member of one of those households, I have seen first-hand the importance of family-friendly workplaces.

When my first son was born in 2014, I remember asking the office manager at the company where I worked at the time, about their paternity-leave policy, to which they replied: "I'm not sure really, no one's ever taken it here before". I made the decision then and there to always choose a family-friendly employer, which I have done ever since - and when my daughter was born, my wife and I were able to share joys and challenges together. The global pandemic has given organisations a unique opportunity to make these changes today, there's no need to wait a generation.

RUWAN KODIKARA, REVIEW COMMITTEE MEMBER AND VICE PRESIDENT, CORPORATE COMMUNICATIONS, INTERNATIONAL, SONY MUSIC ENTERTAINMENT





THE MCKENZIE-DELIS
PACKER REVIEW

THE POWER OF INTERSEC- TIONALITY

Intersectionality refers to how different aspects of diversity, like the ten facets described in this review, combine, overlap, and intersect - especially in the experiences of marginalised people or groups. The vision of many diversity leaders is to acknowledge, protect and respect all unique idiosyncrasies with the aim to harness the power of this intersectionality in every one of us.



If you have the words,
there's always a chance
that you'll

**FIND
THE WAY**

SEAMUS HEANEY

Finding the 'way' is not necessarily a straight line and that there is also effort required by the individual searching for "the way" to their destination. Moving the dial is not a straight line, moreover it's a journey of constant learning and development.

The quote reminds us that it is challenging to make sense of the change needed without the words to describe it. Raising awareness and understanding of diversity intersectionality is essential for progress.

While the visionaries among us may understand this, too frequently the individuals involved do not. If you struggle to find the words it can then be difficult to find the steps to a solution. As Marian Wright Edelman, American civil rights activist said: "You can't be what you can't see."

The findings and results of this report demonstrate the marked differences between the different facets of visible and invisible diversity and highlight the interconnected nature of the societal categorisations.

The McKenzie-Delis Packer Review's goal is to raise the awareness of the multiple intersectionalities, provide the words and the tools for individuals, leaders and organisations to better find the way.



As organisations advance on their diversity maturity journey, the importance of recognising the importance and true power of intersectionality should increasingly become a priority. This is critical if the goal is to ensure every employee can bring their whole selves to work, is engaged and motivated and delivers their best in an environment where they are treated equitably and feel that they are valued, supported, listened to and belong. Now is the time for change.

EDLEEN JOHN FCIPD, REVIEW
COMMITTEE MEMBER, INTERNATIONAL
RELATIONS, CORPORATE AFFAIRS AND
CO-PARTNER FOR EQUALITY, DIVERSITY
AND INCLUSION DIRECTOR AT THE FA



CONCLUSION

One of the oldest pieces of management advice is ‘what gets measured, gets done.’ Bringing the same standards of informed decision-making used throughout management to the business of D&I can be a game-changer.

The development of a comprehensive diagnostic tool like the McKenzie-Delis Packer Review represents a significant step forward in how D&I is measured and can provide a unique level of insight into where your organisation is, and what more you need to do.

The McKenzie-Delis Packer Review encourages all organisations to take action based on real, measured facts rather than ‘common sense’ or opinion. An open and honest analysis can help your organisation understand where you may have equity issues and provide a data-based foundation in order to set goals and where to focus initiatives related to diversity, equity and inclusion.

The stories and best practice shared in this report can easily be translated to any organisation large or small and our hope is that it will equip business leaders around the world with the insight, inspiration and best practice needed to make real, measurable change.

This review and diagnostic tool are the future, the start of a new industry standard where companies recognise and report on many different aspects of D&I.



McKenzie-Delis Packer Review has lifted the lid and

DUG DEEP BENEATH THE SURFACE

of issues of diversity and inclusion in the workplace. Not only does the review look at traditional facets of gender and ethnicity, but the importance of socioeconomic considerations, sexual orientation, parenthood, religion, disability and mental health have been reported on - certainly opening my eyes to D&I in a way no other review has ever done.

RUPINDER BAINS, REVIEW COMMITTEE MEMBER, BOARD MEMBER OF THE FOOTBALL ASSOCIATION & MANAGING DIRECTOR OF PINDER REAUX & ASSOCIATES



The MDP Review is a ground-breaking diagnostic tool for major organisations in the UK to understand where the country stands, where it needs to be, and the actions the UK needs to take in order to get there. If the past year has done anything, it’s demonstrated the importance of listening to the evidence and

TAKING SWIFT ACTION.

The world learned to quickly adapt to a global pandemic which shows there’s no need to wait a generation to provide a more inclusive environment in the world of work. The MDP Review proves this, providing practical insight to take action today.

RUWAN KODIKARA, REVIEW COMMITTEE MEMBER AND VICE PRESIDENT, CORPORATE COMMUNICATIONS, INTERNATIONAL, SONY MUSIC ENTERTAINMENT



Frankly, I was disappointed by the results of the McKenzie-Delis Packer Review. Given the strong evidence that diversity improves decision-making and corporate financial performance, a key takeaway from the report could be that a significant minority of the UK’s corporate leaders are in breach of their fiduciary duty to act in the best interest of their companies.

Nonetheless, there is cause for optimism. The companies that do have diversity strategies are not just looking at gender, but other protected characteristics as well, and the report reveals many areas where rapid progress could be made. We just need the laggards amongst our corporate leadership to accept their fiduciary and moral obligations to be more inclusive.

STEVE KENZIE, EXECUTIVE DIRECTOR OF UN GLOBAL COMPACT NETWORK UK



FINAL WORDS



Organisations sit up and pay attention to diversity when there is increased attention in the media, the government requires them to report on a particular protected characteristic, or when they think they may be exposed rather than recognising the better business performance brought about by a diverse workforce.

The challenge is that D&I is so big that organisations do not know where to start

and have a mindset that this is a problem that needs to be solved. That's when they look to HR where the Diversity Manager is set up to fail. Positive change to any working culture can only be achieved through top level commitment and line manager accountability. It also requires a level of funded resources necessary to invest in change across the D&I landscape. So where next, what will it take to noticeably move the dial on D&I?

DENISE KEATING, REVIEW COMMITTEE AND CHIEF EXECUTIVE OFFICER OF UMBRELLA HR



LEILA MCKENZIE-DELIS

FOUNDER & CEO FOUNDER OF THE MCKENZIE-DELIS PACKER REVIEW

This report was created to consider the importance of each of the ten holistic facets of diversity, inclusion and belonging while also shining a light on the sum of all the parts as opposed to just a few.

As we grow as people in both business and society, we feel it is crucial to consider this diversity journey as an evolution and candidly acknowledge where we are today and how we can improve.

With all that is going on in the world today and the increased online exploits which project an "us versus them" culture, the more we must consider the positive power of intersectionality and all aspects of diversity, inclusion and belonging. The goal is not to project differences that drive us further apart, but to embrace the uniqueness that brings us closer together.

To hear and see everyone as their true self and from their unique backgrounds and experiences is more important than ever before. This is a simple yet comprehensive report that provides facts,

figures, guidance, reassurance and transferable methodologies for us all to collectively learn from. It is an essential tool to recognise, respect and protect individual diversities and understand business and leadership best practices for all.

While there is no doubt that we have a lot of work to do before our workplaces are truly equal, there is much to be positive about. Throughout this review we have highlighted some of the incredible things that are being done by organisations across the UK to create more inclusive workplaces. We already have so many of the solutions to tackle the issues; they just need to be applied more broadly and driven through with passion, process and persistence. I urge all leaders and organisations to take this best practice and adapt it for their own workplaces today.

Leila McKenzie-Delis
Founder & CEO



CONTRIBUTORS

STRATEGIC PARTNERS



DIAL GLOBAL

DIAL Global is a global community for Diverse Inclusive Aspirational Leaders. Our purpose is to create a more open, diverse and inclusive society and help organisations grow authentic cultures to unlock more innovation, more creativity and more productivity.

DIAL Global empowers leaders to make brave choices and take real action by equipping them with the insight, understanding, inspiration and support needed to create change. Our fundamental principle is that peer to peer learning is the most effective method to build knowledge, change attitudes and move the dial in the areas of diversity, inclusion and belonging. DIAL Global facilitates the sharing and transferring of best practice methodologies and knowledge through our world-class network and global summits.

www.dialglobal.org



IPSOS MORI

At Ipsos MORI, we firmly believe that the diversity and range of skills, experiences, backgrounds and ideas creates richer working environments for us all. As an organisation, we want to be as diverse as the people and issues we research, to better reflect and understand the world, and ultimately deliver better research and insight to our clients. The team believe wholeheartedly in the aims of the MDP Review and wanted to contribute our skills to deliver insights from the participating organisations. We look forward to continuing our support of the MDP Review in the years to come.

Ipsos is one of the world's leading market research companies, present in 90 markets and employing more than 18,000 people. Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide a true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our business solutions are based on primary data from our surveys, social media monitoring, and qualitative or observational techniques.

www.ipsos.com/ipsos-mori/en-uk



EY

At EY, our purpose is Building a better working world. The insights and quality services we provide help build trust and confidence in the capital markets and in economies the world over. We develop outstanding leaders who team to deliver on our promises to all our stakeholders. In so doing, we play a critical role in building a better working world for our people, for our clients and for our communities.

In a world that's changing faster than ever, our purpose acts as our 'North Star' guiding our more than 300,000 people – providing the context and meaning for the work we do every day. We help digital pioneers fight data piracy; guide governments through cash-flow crises; unlock new medical treatments with data analytics; and pursue high quality audits to build trust in financial markets and business. In other words, working with entrepreneurs, companies, and entire countries to solve their most pressing challenges.

www.ey.com



UNITED NATIONS GLOBAL COMPACT NETWORK UK

The United Nations Global Compact is a global platform for business and non-business entities to proactively network and engage in areas of human rights, labour, environment, and anti-corruption. Participation in the UN Global Compact is a widely visible commitment to the implementation, disclosure, and promotion of its ten universal principles.

Local Networks, such as the UK Network, are clusters of UN Global Compact Participants and Signatories who come together to advance the UN Global Compact and its principles within a particular geographic context. Our role is to help organisations engage in the UN Global Compact with respect to implementation of the Ten Principles, and create opportunities for multi-stakeholder engagement and collective action.

www.unglobalcompact.org.uk



CORONAUNITY

CoronaUnity is a cross-university student-led consulting organisation with over a 100 students. It was established with the mission to help third sector organisations in the wake of COVID-19, and to create opportunities for students to work on real client projects.

Students all over the globe are looking to join organisations that are inclusive in every sense of the word. We envisage a future where everyone is valued for their talent, mindset and experiences regardless of who they are and where they come from. With this in mind, we encourage organisations to embrace D&I with The McKenzie-Delis Packer Review because together, we can create workplaces that are welcoming to all and productive for generations to come.

www.coronaunity.org



BRAND ADVANCE

Brand Advance is a Diversity Media Network that offers a wide range of services on every platform. Brand Advance was founded as the industry's first dedicated global diversity media network. We are a communications platform and business that connects brands with diverse audiences globally, through comprehensive data and insight, media planning and buying, partnerships and content services.

Our passion and purpose lies in empowering our customers to embrace these fundamental changes in audience, lifestyle and media landscape, by serving these communities in a more creative and authentic way, whilst increasing engagement. We are proud to represent and help each and every brand that chooses us with their cultural marketing.

www.wearebrandadvance.com



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ABOUT THE CONTRIBUTORS



LEILA MCKENZIE-DELIS

FOUNDER OF THE MCKENZIE-DELIS
PACKER REVIEW AND CEO OF DIAL GLOBAL



Leila holds a first class Honours Degree in Business Management and International Business. She was born in Hong Kong, adopted and brought up with her younger brother by British parents with a mixture of Scottish, Welsh and British heritage. She is married to a Greek-American who spent over a decade in China and speaks fluent Mandarin.

Leila leads multiple businesses including DIAL Global (Diverse, Inclusive, Aspirational Leaders) a peer learning network designed to move the dial on diversity, inclusion and belonging. In addition, she is a passionate business owner and entrepreneur running Leila McKenzie Associates an Executive

Search business appointing diverse and inclusive candidates at executive and board level. She was previously interviewed by BBC journalist Clive Myrie on the subject of diversity and benefits of intergenerational leadership. Leila is an experienced presenter and chair and hosts the twice weekly DIAL Global podcast "Diverse & Inclusive Leaders". Moreover, she recently published the book "Diversity, Inclusion and Belonging – a leadership guide about why everyone matters and how to make them feel like they do". Leila's vision is one in which all are welcome to the boardroom in business and beyond in a world that harnesses the power of intersectionality and difference in moving the dial.



MICHELLE AUDETTE

CHIEF MARKETING OFFICER
OF DIAL GLOBAL AND EDITOR
OF THE MCKENZIE-DELIS
PACKER REVIEW

Michelle is a senior strategic marketing professional with over 20 years' experience of driving global marketing and strategy in both FMCG and B2B arenas in large corporate and agile SME entities. Originally from the Boston area, Michelle is an American who has lived in the UK for over 20 years. She is an experienced and motivational leader who grows capability and thrives when working with high performing teams.

Her functional expertise is broad and includes marketing, digital media, innovation, sales, strategy and general management. She is strategic, visionary, highly commercial and has consistently been seen as an exceptionally inspirational leader. She is known for her leadership development skills and is a member of the Association for Coaches.



STUDENT VOLUNTEERS & CONTRIBUTORS



JALI PACKER
HEAD OF RESEARCH FOR
THE MCKENZIE-DELIS PACKER REVIEW

Jali completed his undergraduate studies in Psychological & Behavioural Sciences at the University of Cambridge and recently graduated from University College London with an MSc in Behaviour Change.

He is a passionate advocate for inclusive workplaces and previously co-authored a report with the Wilberforce Society, investigating the application of behavioural insights to help alleviate systemic gender inequality in the UK. Jali has held appointments as a Visiting Researcher at King's College London and Columbia Business School, has presented his research at the Society for Personality & Social Psychology and is published in the British Journal of Health Psychology.

He volunteers regularly as a mentor for upReach, a social mobility charity, and Target Oxbridge, supporting students from less advantaged backgrounds in their applications to top universities and jobs.



ZAC SHANDER-KELSEY

Zac is an Associate on the Emerging Leaders Programme at BNY Mellon. He recently graduated from the University of Bath where he studied Management. Zac Co-Founded CoronaUnity Consulting to help the third sector impacted by the pandemic, leading over 100 student consultants across 20 non-profits. Diversity and Inclusion is at the heart of CoronaUnity with students from over 37 universities and a range of demographics involved. Within his day job, Zac is heavily involved with BNY Mellon's employee resource group, to continue driving the D+I agenda, being appointed as the Governance Co-Chair for BNY Mellon's ethnicity group and leading the Investment Management engagement for the LGBT group.



DAVID BROOKS

David completed his undergraduate studies at the University of Nottingham and is now working towards a doctorate in Chemistry at the University of Manchester. He is a staunch believer in the importance of promoting diversity in the workplace, both because it is quite simply the right thing to do, by enabling an equality of opportunity for everyone, and because of the well-described benefits to businesses in harnessing a broader range of talent. David is therefore proud to participate in the McKenzie-Delis Packer Review to help forward the vision of a more diverse and inclusive workplace.



SILVIA DE GOMERY

Silvia is an International Management undergraduate from the University of Bath, currently on her placement year pursuing her interest in sustainability at a renewable energy company. Growing up in Thailand as a mixed race individual, she was interested to learn about the D&I landscape in the UK and how companies are progressing within the various facets. In addition to pro-bono consulting for third-sector organisations, Silvia

enjoys researching plant-based nutrition and sharing her recipes online. After graduating in 2022, she aspires to follow her passion for nutrition and sustainability by working with organisations redefining the future food system.



PRUDENCE JOHNSON-HILL

Prudence grew up in Beijing, Vancouver and the UK, with three sisters and two full-time working parents. Her background meant that she was particularly passionate about the Nationality and Parenthood facets of the report, and through her research found an increased appreciation for nationality diversity and parent inclusion in the workplace. Alongside her Economics degree, Prudence works as a pro-bono consultant for non-profit organisations. Prudence's future dream is to be able to combine her interest in technology and finance to make an impact on children in developing communities in Asia.



JOE THRUSH

Joe grew up in the UK and is currently a student at the University of Cambridge studying a Master's

degree in Chemistry. He volunteers for a charity that talks to sports teams and societies about mental health, homophobia and racism. In his spare time he enjoys playing rugby, playing guitar and going on bike rides. In the future, Joe is looking to utilise his chemistry knowledge within scientific research or to advise companies in the scientific sector.



BONNIE TSIM

Bonnie is a final year Nanoscience PhD student at the University of Manchester and she completed her Master's in Theoretical Physics at Lancaster University.

Bonnie was appointed as a JSPS International Research Fellow at Osaka University and has contributed content to the Institute of Physics' flagship print magazine.

She was also invited as the first ever student speaker at the European Graphene Flagship Women in Graphene event. In addition, she has previously worked with the Ogden Trust to support teaching physics in schools.

Bonnie believes that by simply being visible, we can make the difference and inspire others. With this in mind, Bonnie contributes to science outreach activities, teaching undergraduates and runs training workshops for 180 Degrees Consulting Manchester.



CONTRIBUTORS

RESEARCH PARTNERS

The Parker Review

THE PARKER REVIEW

The Parker Review is an independent review which urges business leaders to improve the ethnic and cultural diversity of UK Boards to better reflect their employee base and the communities they serve.

The report sets out achievable objectives and timescales to encourage greater diversity, and provides practical tools to support Board members of UK companies to address the issue. The Review's recommendations fall under the following three areas:

- Increase the ethnic diversity of UK Boards by proposing each FTSE 100 Board to have at least one director from an ethnic minority background by 2021 and for each FTSE 250 Board to do the same by 2024
- Develop a pipeline of candidates and plan for succession through mentoring and sponsoring
- Enhance transparency and disclosure to record and track progress against the objectives

https://assets.ey.com/content/dam/ey-sites/ey-com/en_uk/news/2020/02/ey-parker-review-2020-report-final.pdf



HAMPTON-ALEXANDER REVIEW

The Hampton-Alexander Review is an independent review body, dedicated to increasing female representation on UK boards and in senior leadership positions.

The Review set a minimum 33% target for women on FTSE 350 Boards and in the two layers of leadership below the board, the Executive Committee and the Direct Reports to the Executive Committee, by the end of 2020.

Success requires robust action from all stakeholders and every FTSE 350 company to play their part.

The reports have been published annually since 2016 and the next report will be published on 24 February 2021.

<https://ftsewomenleaders.com/>



STONEWALL

Stonewall was founded in 1989 by a small group of people (including Sir Ian McKellen) who had been active in the struggle against Section 28 of the Local Government Act. Section 28 was an offensive piece of legislation designed to prevent the so-called 'promotion' of homosexuality in schools; as well as stigmatising lesbian, gay and bi people, it galvanised the LGBT community.

The aim from the outset was to create a professional lobbying group that would prevent such attacks on lesbians, gay and bi people from ever occurring again. Stonewall has subsequently put the case for equality on the mainstream political agenda by winning support within all the main political parties and now has offices in England, Scotland and Wales. In 2015, and following a six-month consultation with trans communities, Stonewall became trans inclusive.

We're here to let all lesbian, gay, bi and trans people, here and abroad, know they're not alone.

We believe we're stronger united, so we partner with organisations that help us create real change for the better. We have laid deep foundations across Britain - in some of our greatest institutions - so our communities can continue to find ways to flourish, and individuals can reach their full potential. We're here to support those who can't yet be themselves.

But our work is not finished yet. Not until everyone feels free to be who they are, wherever they are.

<https://www.stonewall.org.uk/>



UPREACH

upReach is a Social Mobility Charity, dedicated to supporting students from less-advantaged backgrounds to secure top jobs. Many employers partner with upReach to improve the socio-economic diversity of their workforce, or to support their wider diversity and corporate social responsibility objectives.

Social mobility is a bigger problem in the UK than any other developed country. The top of many professions is dominated by those educated at private schools - 74% of judges, 71% of barristers, 51% of journalists went to schools that educate only 7% of the population.

While more students than ever from less-advantaged backgrounds are now going to university, this has not translated to an increase in the number successfully securing roles on competitive graduate programmes at leading firms - the gateway to a successful career.

The reasons for this are many. upReach works to improve social mobility by creating the conditions for undergraduates from less advantaged backgrounds to access and sustain top graduate jobs.

<https://upreach.org.uk/>



RESEARCH PARTNERS



CENTRE FOR AGEING BETTER

The UK's population is undergoing a massive age shift. In less than 20 years, one in four people will be over 65 and The Centre for Ageing Better want everyone to enjoy later life.

They aim to support older people to be in fulfilling work by helping employers create age-friendly workplaces and improve support for older jobseekers. It aims to change policy and practices, informed by evidence, to improve health, housing, communities and employment for older people.

<https://www.ageing-better.org.uk/>



BUSINESS DISABILITY FORUM

Business Disability Forum is a not for profit membership organisation which brings business leaders, disabled people, and Government together to improve the lives and increase the economic participation of disabled people.

They do this by bringing business leaders, disabled people, and Government together to understand what needs to change to improve the life opportunities and experiences of disabled people in employment, economic growth, and society more widely.

Their 300+ Members and Partners represent a huge cross sector of UK and global business, employing an estimated 20% of the UK workforce and 8 million people worldwide. They provide them with a wealth of practical advice and support, thought leadership and networking opportunities so that they can share what works – and what doesn't.

In turn, they share this feedback and experience with government and policy makers to help shape disability policy that works.

<https://businessdisabilityforum.org.uk/>



GLOBAL FUTURE

Global Future is a leadership consultancy committed to helping organisations build openness, diversity and inclusion into the way they operate. The Global Future Think Tank supports the leadership consultancy in researching new insights across society, business and the arts to help drive the openness agenda.

They believe the dynamism of our economy and creativity of our culture depends on our country remaining open to people, trade and ideas from across the world.

Global Future's mission is not only to help people appreciate the benefits of openness but also to understand the genuine issues that stand in the way of realising these benefits for everyone. They will explore new ways for people to take more control over what matters most in their lives without cutting themselves off from opportunities to succeed in an interconnected world.

<https://ourglobalfuture.com/>



MINDS @ WORK

Minds at Work is a community-led charity which works to inspire and equip organisations to eradicate the stigma of mental illness and create a healthier working world.

In a landscape burgeoning with "experts" on mental health, they stand proudly as a community of "learners" in relentless pursuit of the most progressive ideas and solutions.

They don't sell products or services and so are completely independent. They occupy the space of connector, curator, convener, collaborator and a catalyst for the difficult conversations on mental health topics that are still taboo.

<https://www.mindsatworkmovement.com/>



RESEARCH PARTNERS



MIND

Mind is a mental health charity in England and Wales. Founded in 1946 as the National Association for Mental Health (NAMH), it celebrated its 70th anniversary in 2016.

Mind provide advice and support to empower anyone experiencing a mental health problem and they campaign to improve services, raise awareness and promote understanding.

It also works to raise public awareness and understanding of issues relating to mental health. Since 1982, it has awarded an annual prize for "Book of the Year" having to do with mental health, in addition to three other prizes. Since 2008 Mind has hosted the annual Mind Media Awards, celebrating the best portrayals and reporting of mental health across the media.

<https://www.mind.org.uk/>



POWER OF THE PARENT

Charlotte Speak is the founder at Power of the Parent® where she collaborates with businesses who are wanting to proactively support their teams and drive engagement throughout what is a period of significant change for everybody involved.

The mission at Power of the Parent® is about generating conversations that positively challenge some of the negative narrative parents in the workplace can face, as well as helping businesses build on what they're already great at. Parents return to work with so many untapped skills, drive and experiences, Charlotte thrives on showing all the amazing things that can happen for employers when they have working parents on their side. Using a strengths-based approach to workshops and coaching, Charlotte understands first-hand the positive impact this way of working can have on productivity, engagement, confidence and well-being.

<https://www.power-of-the-parent.com/>

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We would like to thank the following teams for their help and support. This report would not have been possible without you:

IPSOS MORI TEAM

Ellie Shaw
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Sofia Garre

THE DIAL GLOBAL TEAM

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Jodie Buck
Francis Fisher
Gareth Elliott

THE CORONAUNITY TEAM

Led by Zac Shander-Kelsey for their efforts in researching the diversity and inclusion landscape and compiling the literature review.

MDP OUTREACH TEAM

Led by Alesha Uka at CoronaUnity for their efforts in reaching out to organisations during data collection. We thank Harrison Frost, Kristianto Gozali, Shallom Iriele, Nandana Santhosh, Inayah Shah, Sanskriti Sharma, Amelia Taylor and Gurleen Viridi. Additionally, we would like to thank Rhea Kamath for proofreading the literature review. Lastly, we would like to thank Cenk Dominic Özbakır and Johann Gross for offering Citationsy as a reference tool for the MDP.



APPENDIX

Scorecards for participating organisations

All participating organisations were scored on every facet, depending on their responses to the survey questions. An aggregate score for each facet was then translated to a 0-to-10 scale to allow comparison both within and between facets. Each participating organisation that opted-in will be receiving a personalised score report following the publication of the Review. These score reports will inform organisations of how their performance on each of the facets compares to the average scores of all participating organisations and the top performers. Reports will also provide guidance for organisations looking to improve their workplace diversity and inclusion and connect them with the relevant research partners to support them in this journey.

Scoring the facets

Each question was weighted equally for a facet, with organisations receiving a score based on their responses. For example, on a question using a Yes/No/Don't Know scale, Yes = 1, No = -1 and Don't Know = 0. If there were four questions on a Yes/No/DK scale, an organisation could score a max of 4 and a min of -4. This raw score was then converted to a score on a 0-to-10 scale, to aid comparison between and within facets. This conversion also ensured that all facets were scored on the same scale and thus could be used to assess overall performance. For this example, a raw score of 4 would be 10 on the converted scale, while a raw score of -4 would be 0.

Selecting the top performers

To assess overall performance (across all facets), we calculated the average of the ten converted scores for each organisation. All facets were weighted equally. This final score (on a 0-to-10 scale) was then used to rank organisations and identify our top performers. Any organisations that declined from being publicly recognised in the Review were removed from this listing, with the next-ranked organisation taking their position.

The scoring methodology for each facet is provided in further detail below:

- 1. Gender:** Four questions were utilised, all using a Yes/No/DK scale, meaning that organisations could score a maximum of 4 and a minimum of -4. Two questions were excluded from analysis (Q3.2 and Q3.3), which asked about the number of Male/Female/Non-binary individuals on the Leadership Team and board. We were unsure as to what a "best case scenario" should look like for these proportions and some of our authoring team raised concerns that we might not be rewarding parity, e.g., organisations with greater than 50% female boards could receive a higher score. Hence, these questions were excluded from analysis.
- 2. Race and Ethnicity:** Six questions were utilised, all using a Yes/No/DK scale, meaning that organisations could score a maximum of 6 and a minimum of -6. Two questions were excluded from analysis (Q1.2 and Q1.3), which asked about the number of White/BAME/Mixed ethnicity individuals on the Leadership Team and board. We were unsure as to what a "best case scenario" should look like for these proportions and some of our authoring team raised concerns that we might not be rewarding parity if we proposed our own "best case scenario". Hence, these questions were excluded from analysis.
- 3. Sexual Orientation:** Eight questions were utilised, all using a Yes/No/DK scale, meaning that organisations could score a maximum of 8 and a minimum of -8. No questions were excluded.
- 4. Disability:** Three questions were utilised, all using a Yes/No/DK scale, meaning that organisations could score a maximum of 3 and a minimum of -3. No questions were excluded.
- 5. Age:** Five questions were utilised, all using a 5-point Likert scale, ranging from Strongly disagree to Strongly agree. These questions were scored from 0-to-1, with Strongly agree assigned a 1 and strongly disagree a 0. Hence, organisations could score a maximum of 5 on this facet and a minimum of 0. Two questions were excluded (Q5.2 and Q5.3) as these asked about the proportion of different ages represented on the Board and thus could not be used as an evaluative metric.
- 6. Religion:** Five questions were utilised, all using a 5-point Likert scale as described above, meaning that organisations could score a maximum of 5 and a minimum of 0. One question was excluded (Q8.2) as it asked about the existence of specific provisions and could not be used on an evaluative basis.
- 7. Nationality:** Two questions were utilised, both using a Yes/No/DK scale, meaning that organisations could score a maximum of 2 and a minimum of -2. One question was excluded (Q7.2: What is the nationality of your CEO), as this could not be used on an evaluative basis.
- 8. Socioeconomic:** Five questions were utilised, all using a Yes/No/DK scale, meaning that organisations could score a maximum of 5 and a minimum of -5. One question was excluded from analysis (Q4.2: Which of the following type of university did your CEO attend for their undergraduate degree?).
- 9. Mental Health:** Five questions were utilised, all using a 5-point Likert scale as described above, meaning that organisations could score a maximum of 5 and a minimum of 0. No questions were excluded.
- 10. Parenthood:** Eleven questions were utilised. Five used a Yes/No/DK scale and six used a 5-point Likert scale, as described above, with organisations scoring a maximum of 11. No questions were excluded.



TOP 25 PERFORMERS



Airedale NHS Foundation Trust

Auto Trader Group PLC

Barratt Developments PLC

Berkshire Healthcare NHS Foundation Trust

Boots UK

Britvic PLC

The Christie NHS Foundation Trust

County Durham & Darlington NHS Foundation Trust

The FA

Firstgroup PLC

Gloucestershire Health and Care NHS Foundation Trust

Ipsos MORI

KPMG

Lexis Nexis Risk Solution

Lloyd's of London

Natwest Group

NHS Foundation Trust

The Newcastle Upon Tyne Hospitals NHSFT

Rentokil Initial PLC

Rotherham Doncaster and South Humber NHSFT

Schroders PLC

Severn Trent PLC

St. James's Place PLC

Tesco PLC

Yeovil District Hospital South West Yorkshire Partnership NHS Foundation Trust

THE MCKENZIE-DELIS PACKER REVIEW PARTICIPATING ORGANISATIONS

This is a selection of the full sample of participating organisations as not all respondents consented to being publicly listed.

Airedale NHS Foundation Trust

Alfa Financial Software Holdings PLC

Barratt Developments PLC

BBC

Berkshire Healthcare NHS Foundation Trust

Biffa PLC

Boots UK

Britvic PLC

Cambridgeshire and Peterborough NHS Foundation Trust

Cardiff and Vale University Health Board

The Co-op

County Durham & Darlington NHS Foundation Trust

Croydon Health Services NHS Foundation Trust

Northern Ireland Civil Service (NICS)

Diageo PLC

Dorset County Hospital NHS Foundation Trust

Firstgroup PLC

Gloucestershire Health and Care NHS Foundation Trust

Hampshire Hospitals NHS Foundation Trust

Harrogate and District NHS Foundation Trust

Hertfordshire Community NHS Trust

Hostelworld Group PLC

Ipsos MORI

Keller Group PLC

Kingfisher PLC

KPMG

Lloyd's of London

Marks and Spencer Group PLC

NatWest Group

Northern Lincolnshire and Goole NHS Foundation Trust

Paypoint PLC

Portakabin

Public Health Wales

Reckitt Benckiser Group PLC

Lexis Nexis Risk Solutions

Rentokil Initial PLC

Rotherham Doncaster and South Humber NHS Foundation Trust

Royal Free London NHS Foundation Trust

Schroders PLC

Severn Trent PLC

Smiths Group PLC

South West Yorkshire Partnership NHS Foundation Trust

Spectris PLC

Studio Retail Group PLC

Synthomer PLC

Tesco PLC

The Dudley Group NHS

Foundation Trust

The FA

The Newcastle upon Tyne Hospitals NHS Foundation Trust

The Restaurant Group PLC

The Unite Group PLC

Torbay and South Devon NHS Foundation Trust

U and I Group PLC

Visa Europe

William Hill PLC

Wincanton PLC

XP Power Limited

Yeovil District Hospital NHS Foundation Trust

INC

LUSS

LOIN