

**CMI** Chartered  
Management  
Institute

**75**

YEAR

1947-2022

ANNIVERSARY

# THE EVERYONE ECONOMY

CMI's plan for sharing work,  
opportunity and success

A special report to mark the 75th anniversary of CMI

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Thanks to Sam Budd CCMI for her practical contributions



# THE BACK STORY

CMI was born in the shadow of war. In 1947, the year we were formed, the world was recovering from a devastating global conflict. Millions had died. Economies in Europe and around the world were on their knees. And new dangers were already emerging.

The world needed a plan, and the steps taken in this period – such as the US-sponsored Marshall Plan and the expansion of the welfare state in the UK – were crucial to rebuilding Europe and creating prosperity in the subsequent decades. Those subsequent years turned out to provide huge opportunities and growth for many people and economies.

It was in this era of collective effort and reconstruction that the British Institute of Management (later to become the Chartered Management Institute) was formed. Our remit was to raise standards of management. In the following decades and to this day, CMI and its members have been closely involved in countless social and economic advances.

Seventy-five years on, the world is at another pivotal point. The challenges are different and we should not overstate the historical parallels. But there is no doubt that concerted effort is needed to help economies around the world recover from the Coronavirus pandemic and the other shocks we have experienced over the past decade, from financial crisis to renewed conflict. Systematic exclusion, strained public services amidst an ageing society, and environmental destruction will only become increasingly acute challenges.

It is in this context that we set out to explore – in CMI's 75th anniversary year – the skills and capabilities that managers and leaders will need to develop in order to navigate the post-pandemic era and drive their organisations to sustained success. Our conclusion: a relentless focus on genuine inclusion was central to a better economic and social future. And so we need a new plan. But a different type of plan. And that is what the 'Everyone Economy' is designed to help address.





## WHY NOW?

This report was commissioned in early 2022, at the beginning of CMI's 75th anniversary year. Our objective was to contribute to the debate from the perspective of what managers and leaders need to lift their organisations and the wider economy to meet the challenges ahead.

To inform this report, we gathered fresh evidence from CMI's global membership community of managers and leaders; from our specially convened 75th-anniversary advisory council; from a series of "Leading Lights" interviews with global leaders; from established players changing their operating model to disruptive start-ups; and from grass-roots projects. We also explored research from multiple publications and organisations.

The picture that emerges is troubling. Despite efforts, far too many people face discrimination and exclusion. Managers and leaders will face raised levels of change, complexity and risk in the years ahead. Our economies, organisations and individual leaders have serious weaknesses. The burden will not only be on those directly affected; it will be on us all as we shall see.

We also see a clear pathway to realising full economic and social opportunity – by ensuring that everyone, regardless of background or personal characteristics, has the chance to make their best possible contribution, and reach their maximum personal potential. This hopeful path is the focus of the report.

The central message is that economic recovery and long-term resilience depend on utilising all the talent and perspectives in our workforce. We have a once-in-a-generation opportunity to supercharge productivity. This is the opportunity of "the Everyone Economy."

Maximising talent is easier said than done. This research reveals an epidemic of lip service. Many organisations – and their people – say that they are committed to diversity and inclusivity but, on closer inspection, their warm words do not stand up to scrutiny. And as the next section shows, we waste this talent at our peril.

This report calls on all managers, leaders and organisations to step up. And it relies on policy-makers and legislators to move away from passivity to far greater activism, so that all may catch up and we can collectively prosper. There is a solid body of evidence now showing the positive business and economic case for diverse teams and inclusive working cultures (see 'The Productivity Dividend' on page 6). By contrast, there are multiple examples of the damaging impacts of groupthink on performance – from dictatorial states through to poor business cultures. We find similarly damaging impacts with operating systems that systematically exclude, and thereby waste, our most valuable resource: us.

The next phase of building the 'Everyone Economy' will require fresh, concerted effort from leaders at all levels. We need to move from **passive awareness to determined leadership**:

- To empower diverse team members.
- To make sure they are heard and seen.
- To champion and support their development.
- To take actions that are known to close gaps for under-represented or disadvantaged groups.
- To create and sustain positive, inclusive cultures in private, public and third-sector organisations alike.
- To create the supportive legal, regulatory and policy environment that will enable the 'Everyone Economy' to flourish.

The process won't be straightforward. Shifting cultures and biases will require uncomfortable transformations, conversations and transitions. But the potential gains of a full-participation economy are huge – not only in terms of GDP and business profits, but through helping everyone to live better lives. This report is designed to show we can achieve this vision.

## THE PRODUCTIVITY DIVIDEND

- According to research from McKinsey<sup>1</sup>, companies in the top quartile for gender diversity on executive teams were 25% more likely to experience above-average profitability. In the case of ethnic and cultural diversity, they found that the most diverse companies outperformed the least diverse companies by 36% in terms of profitability. McKinsey also found 51% of employees who recently quit their job cited a lack of belonging at work as a critical reason for leaving.<sup>2</sup>
- Analysis by Boston Consulting Group<sup>3</sup> across 8 countries showed a strong and statistically significant correlation between the diversity of management teams and overall innovation. Companies that reported above-average diversity on their management teams reported innovation revenue that was 19 percentage points higher than that of companies with below-average leadership diversity - 45% of total revenue versus just 26%.
- Organisations with greater gender diversity are 1.4 times more likely to have sustained, profitable growth according to research from PwC<sup>4</sup> that also found Fortune 500 companies with the highest representation of women board members obtained significantly higher financial performance than those with lower representation - with notably stronger than average performance at companies with three or more women board directors.
- Real GDP per capita in 2050 could be 20% higher according to OECD estimates if we're able to build multigenerational workforces and give older employees greater opportunities to work.<sup>5</sup>
- Recent analysis finds a productivity premium for having a more diverse workforce and suggests that increasing diversity can close the productivity gap between typical and top performing companies.<sup>6</sup> The research finds around a 3% productivity premium if managers are more gender diverse and around 7% if managers are more culturally diverse.





## CASE STUDY: GILLETTE

*Gary Coombe leads P&G's global grooming business, including the biggest shaving brands in the world – Gillette, Venus and Braun – serving nearly 800 million consumers around the world.*

Gillette aims to put EDI at the centre of its business strategy - as “built in” to the ethos of the organisation, rather than just a “bolt on”.

To deliver this Gillette has representation targets at every management level and part of the performance of general managers and senior vice presidents is assessed on what progress they are making towards these targets in terms of hiring and promotion. Gary is a big believer in reverse mentoring and has benefited from this himself. Gillette aims to create a safe environment for more junior colleagues to feedback their views on the organisation and their lived experiences to senior staff so that it can learn from these experiences and improve.

The company has found that active allies are critical in building an inclusive culture and this doesn't mean people who declare they support diversity and inclusion, but that everyone is taking action and making a difference. To facilitate this, EDI is always an agenda item in Global town halls. Staff groups focused on gender equality, people with disabilities, African Ancestry, Asian Heritage and LGBT colleagues feed into these meetings, but all staff are invited to engage which helps create allies. The company also runs dedicated celebration and awareness months for these EDI affinity groups as well as a series of external expert guest speakers on various aspects of EDI and allyship which are open to every employee. Gary says, ‘...solving these problems can't fall on the shoulders of those most marginalised, we need active allies; this is everybody's job.’

He attributes the company's focus on EDI as an important factor in delivering better business results: it has led to a team that feels fully engaged and one that is representative of the consumers they serve.

*‘If you don't create a diverse and inclusive team, you'll have a weaker team than the competition. So it's got to be a central business strategy.’*



# SIX KEY OUTTAKES

## 1. WE'RE WASTING TALENT – JUST WHEN WE NEED IT MOST

This study has identified a number of crucial areas in which the UK population and workforce are changing. When economies reach a certain size and complexity it gets harder to increase productivity. Doing so relies increasingly on identifying potential – not just social background or levels of education – in order to maximise talent. This presents challenges for maximising UK economic success in the post-pandemic era.<sup>7</sup>

### **An increasingly female workforce.**

Between 2017 and 2027, the number of jobs in the UK is projected to rise by around one million – and more of these jobs are expected to be taken by female workers (800,000) than male (300,000).<sup>8</sup> Yet CMI's data shows there are 560,000 missing female managers in the UK right now,<sup>9</sup> and to equal the proportion of females in the UK population by 2026 an additional 800,000 female managers will be needed - an increase of 24% from 2021.<sup>10</sup>

### **An ageing workforce.**

The UK has an ageing population and workforce. From the mid-1990s up to the start of the pandemic, the employment rate for people aged 50 years and over has been increasing. For example, in 1995 the employment rate for people aged 50 to 64 years was 57.2%. This has steadily increased since and in April to June 2021 the employment rate was 71.2%.<sup>11</sup>

### **Socio-economic background.**

By international standards the UK performs poorly on measures of social mobility.<sup>12</sup> This is compounded by the fact that CMI's research shows that the UK has 420,000 missing managers from lower socio-economic backgrounds.

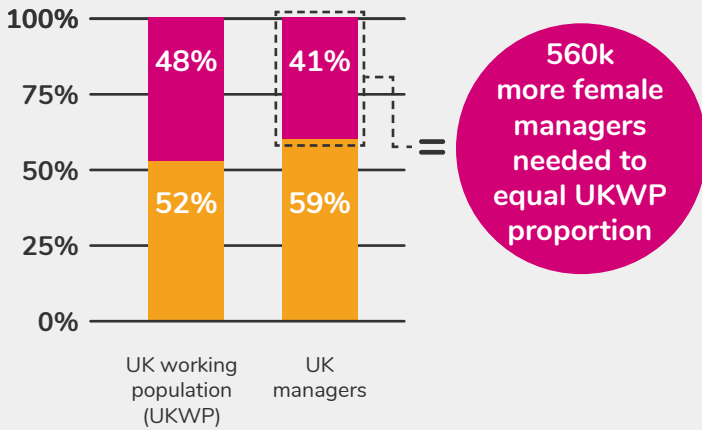
### **Disability prevalence at working ages is increasing.<sup>13</sup>**

1 in 5 of the working-age population are classed as disabled and the numbers of those reporting a disability in work are increasing.<sup>14</sup> Yet there is an almost 30 percentage point difference between the working age employment rate (81%) and the disability employment rate (57.2%).<sup>15</sup> At management level, CMI's research shows there are 290,000 missing disabled managers.

### **The percentage of the population from diverse ethnic groups is projected to rise**

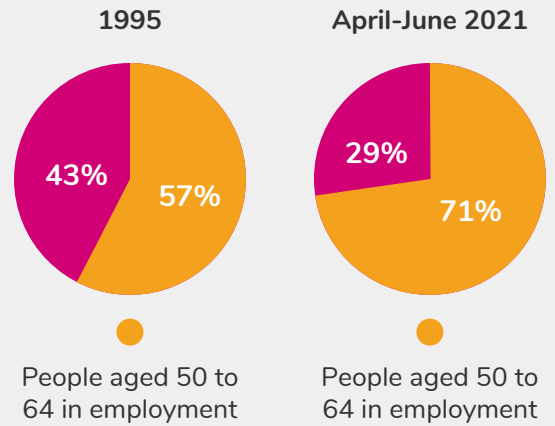
– from 15% in 2019<sup>16</sup> to 21% in 2026 and 30% by 2051.<sup>17</sup> Yet once again, our research shows there are 100,000 missing managers from diverse ethnic backgrounds and that the exclusion is greatest for those from particular communities.<sup>18</sup>

Figure 1: The UK deficit of female managers



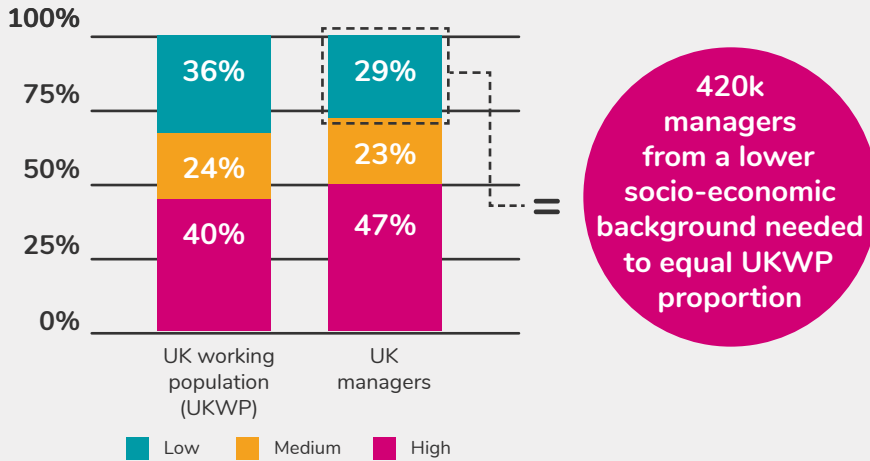
Data Source: CMI Analysis of Labour Force Survey, Jan-Mar 21

Figure 2: Proportion of people aged 50 to 64 in employment



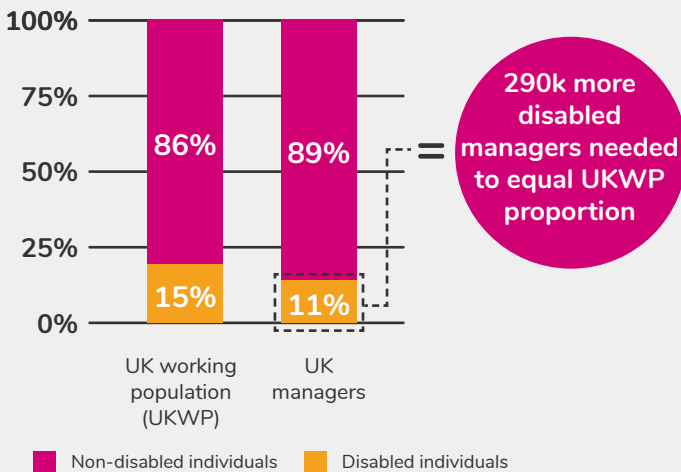
DWP (2021), Economic Labour Market Status of Individuals Aged 50 and Over, Trends Over Time: September 2021

Figure 3: The UK deficit of managers from lower socio-economic backgrounds



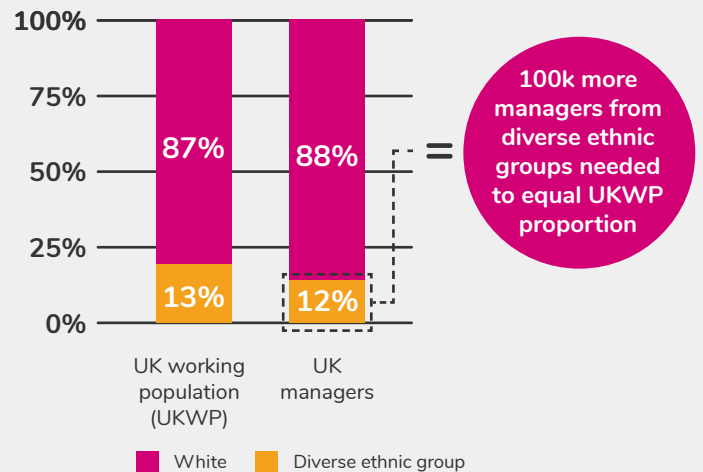
Data Source: CMI Analysis of Labour Force Survey, Jan-Mar 21

Figure 4: The UK deficit of disabled managers



Data Source: CMI Analysis of Labour Force Survey, Jan-Mar 21

Figure 5: The UK deficit of managers from diverse ethnic groups



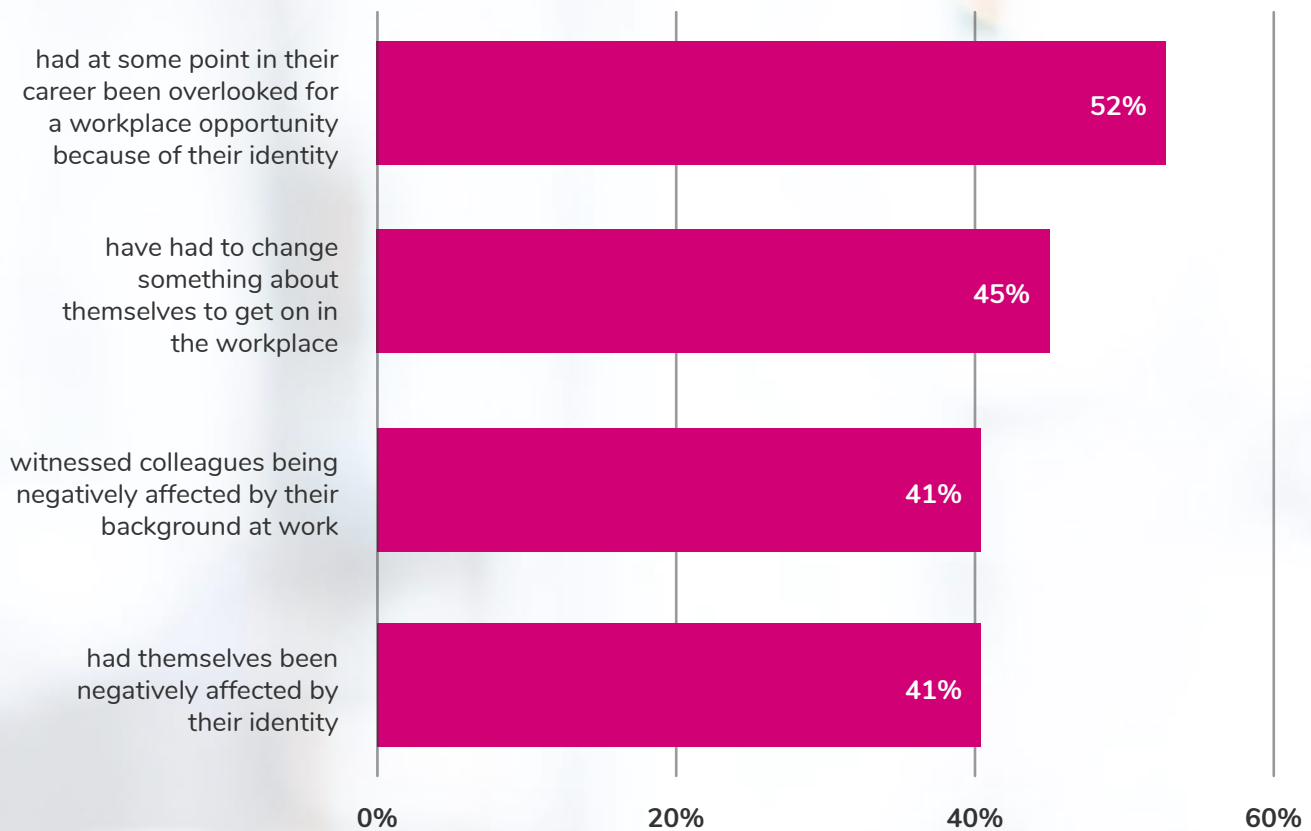
Data Source: CMI Analysis of Labour Force Survey, Jan-Mar 21

## 2. STELLAR TALENT IS OVERLOOKED ACROSS OUR ECONOMY

We surveyed 2,066 UK employees (who were not in managerial roles) for this report:<sup>19</sup>

- 41% said they had witnessed colleagues being negatively affected by their background at work.
- 41% said they had themselves been negatively affected by their identity.
- Over half (52%) said they had at some point in their career been overlooked for a workplace opportunity because of their identity.
- Nearly half (45%) say they have had to change something about themselves to get on in the workplace.<sup>20</sup>
- For all of these statistics the percentages were higher for minority groups, and particularly high for those from Black backgrounds, and those identifying as LGBTQ+.

Figure 6: Proportion of employees reporting negative impacts of identity or background in the workplace



Base: 2,066 UK employees



### 3. WE'RE TOO MUCH SAY AND NOT ENOUGH DO

Our research identified a significant awareness-to-action gap across UK workplaces. We found that, while managers overwhelmingly see their organisation as inclusive, the reality is different. Organisations think and say they're doing the right thing – but the evidence suggests that they are failing to deliver.

- 93%... of respondents agreed that their organisation is inclusive of all staff regardless of sexual orientation.<sup>21</sup>
- 91%... regardless of gender.<sup>22</sup>
- 89%... regardless of their gender identity.<sup>23</sup>
- 88%... regardless of their ethnicity.<sup>24</sup>
- 85%... regardless of age.<sup>25</sup>
- 83%... regardless of their socio-economic background.<sup>26</sup>
- 81%... regardless of disability.<sup>27</sup>

#### Yet we also found widespread complacency:<sup>28</sup>

- People are more likely to report their organisation is inclusive if their work colleagues are **similar to themselves**.
- Male managers were more than twice as likely as female managers to say that too much effort in UK organisations is being focussed on ensuring a gender balanced workplace is achieved (33% vs. 13%).
- Male managers were nearly twice as likely as female managers to say that their organisation can successfully manage future challenges without a gender-balanced senior management team (62% vs 33%).
- Female managers with children were more likely to feel they had missed out than male managers with children on:
  - promotions: 37% vs. 27%.
  - salary rises: 33% vs. 20%.
  - stretch projects: 30% vs. 19%.

## 4. MANAGERS AND LEADERS AREN'T TAKING THE OBVIOUS STEPS

Even rudimentary approaches to identify and address gaps in representation and progression within organisations are rare. In trying to make progress, we're starting from a low base. And if leaders don't step up, others won't follow.

### **We discovered low levels of transparency in terms of data collection and reporting:**

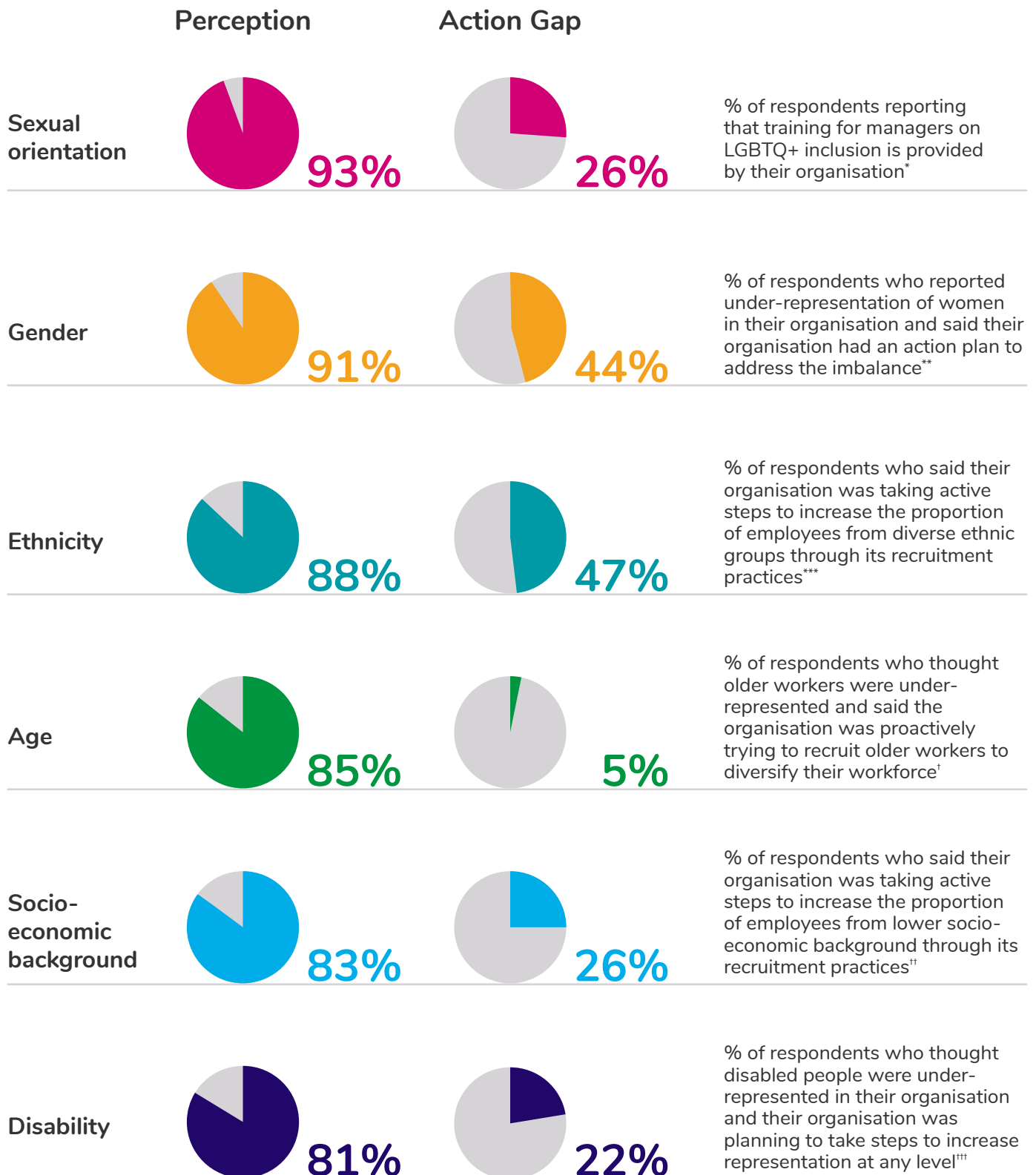
- 80% of respondents said their organisation either did not capture the socio-economic background data of applicants during the recruitment process, or they did not know if their organisation collected this data.<sup>29</sup>
- 67% of respondents said they did not know, or that their organisation has taken no action, in relation to Ethnicity Pay Gap (EPG) reporting and action plans which includes data collection.<sup>30</sup>
- 39% of respondents said either their organisation does not collect data on disability in its workforce, or they did not know if their organisation collects this data.<sup>31</sup>

### **We discovered an absence of specific initiatives:**

- Of those who thought disabled people were under-represented in their organisation, only 22% reported that their organisation was planning to take any steps to increase representation at any level in their organisation.<sup>32</sup>
- 26% of respondents said their organisation was taking active steps to increase the proportion of employees from a lower socio-economic background through its recruitment practices.<sup>33</sup>
- Of those who thought women were under-represented in their organisation, only 44% reported their organisation had an action plan to address the imbalance.<sup>34</sup>
- Of those who thought older workers were under-represented in their organisation, only 5% said the organisation was proactively trying to recruit older workers to diversify their workforce.<sup>35</sup>
- Less than half of respondents (47%) said their organisation was taking active steps to increase the proportion of employees from diverse ethnic groups through its recruitment practices.<sup>36</sup>
- Only 26% of respondents reported that training for managers on LGBTQ+ inclusion is provided by their organisation.<sup>37</sup>

## Figure 7: The perception-action gap in organisations

Proportion of respondents that agreed their organisation is inclusive of all staff regardless of...



\*\* Base: 1,183 UK based respondents. \*\*\* Base: 857 UK based respondents. † Base: 1,159 UK based respondents. †† Base: 1,162 UK based respondents. ††† Base: 1,037 UK based respondents.



## 5. GOVERNMENT NEEDS TO LEAD BY EXAMPLE

- Government must recognise that effective EDI (Equality, Diversity and Inclusion) is key to unlocking UK productivity and economic effectiveness rather than just see it through the lens of regulatory burden - 'red tape' in the political jargon.
- The 'Everyone Economy' shares the same fundamental principle that sits under the 'Levelling Up' agenda - that we as a nation will be more prosperous when opportunity is shared more widely and more fairly across all of the UK's communities.
- Whilst the Government's Levelling Up White Paper has moved the policy from a soundbite to a strategic mission, CMI believes more should be done to instil the principle behind it (and so, behind the 'Everyone Economy') into every aspect of the Government's activity. Looking to produce a workforce fit for the future? The more diverse talent you can access the better. Wanting to present 'Global Britain' abroad? Ensure the UK represents and celebrates all of the communities which make it up.
- Better data is key to this: Government needs to commit to pay gap reporting and mandatory action plans in order to move the dial on all areas of diversity.
- Beyond this, it should move beyond a narrow legalistic and regulatory approach, to shine a light on good and bad practice and to use the persuasive power of policy and regulation to encourage innovation.
- This means, choosing not to award lucrative contracts to companies that consistently fail to diversify their leadership teams or to demonstrate their commitment to recognising talent in all its forms including through equal pay; to ensure everyone can benefit from access to flexible working; to boost effective management practice; and to hold leaders and companies to account when they fail to act on diversity and inclusion in all its forms.
- The business department - BEIS - needs to own this agenda, working closely with the cabinet office, to spread best practice, catalyse progress and turbo-charge productivity and performance - right across the economy and starting with the civil service itself.



## 6. REMEMBER, 'MARKET FAILURES' ARE ALSO HUMAN TRAGEDIES

Until now, the issues around EDI have primarily been seen as related to social justice and/or regulation. This has resulted in a compliance approach at one end of the spectrum and a laissez-faire approach at the other. This in turn has prevented serious across-the-board engagement among employers with an agenda that will create *business and organisational benefits*.

This is, to use economists' terminology, a *market failure* – the under-supply of effective management practice that creates and sustains working environments in which all people can thrive. This has in turn compromised the ability of organisations, sectors, and the wider UK economy to achieve their potential.

Exclusion also has profound human impacts. In researching this report, we have heard many moving individual stories of people prevented from participating in work and the wider economy. Many of us will have felt excluded at some point in our life or career. Now imagine what it is like to feel excluded every day. That is how many employees and managers from under-represented groups in the workplace feel.

In the most dramatic instance that we heard, a young man was picked off the street during his lunch break and put in a cell for 23 hours without charge because he fitted the description of a suspect with the same skin colour. Another person was quizzed about their sexuality in a job interview. In May 2022, a female chief executive was told by shareholders that she should be 'wearing trousers'

Recruiting, retaining, and developing diverse talent is no longer just about 'doing good'; it is critical to business success. As an employer, a manager, or leader, if you are not enabling those from under-represented or disadvantaged groups to contribute in the best way possible, then you are going to be limiting your organisation's effectiveness. Some of your best and brightest workers will either walk away to more enlightened employers or will be forced to systematically under-perform. Both are disastrous. This is about going beyond setting EDI policies alone and toward permanent and sustainable changes in the way we as leaders behave.

Getting this right requires ambition and action from everyone - business and other employers, employees, and government. We need to do more to step out of our comfort zone, reach out to others who don't necessarily look like us, or feel they've had similar experiences, talk to them about their aspirations, interests and strengths, and most importantly what is holding them back. We will have to take some risks and often we will get it wrong. That's fine, if we are authentic in our ambitions we will be forgiven and we will collectively learn. Then we can take the right actions to level the playing field.

It's only then that we will be able to realise untapped talent and rectify this missed economic opportunity, as well as the human benefits of ensuring that the 'Everyone Economy' becomes a reality. The economic future of the UK relies on us getting this right.

# AS A LEADER, IF YOU DO JUST 5 THINGS AFTER READING THIS REPORT

1.

**Ask yourself challenging questions and pay attention to the answers.** Don't gloss over difficult facts and conversations.

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2.

**Put together a plan and track your progress.** Study your data, improve it, share it, and hold yourself accountable.

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3.

**Embrace flexible working.** Even small degrees of flexibility increase your chances of attracting and retaining a diverse talent pool.

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# 4.

**Recognise the central role of all managers, not just EDI specialists.** Each and every manager should be aware, trained, and practise inclusive leadership every single day.

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# 5.

**Be a story-teller and a role model.** Share your experiences of work and your own challenges. Say why diversity, inclusion and fairness matters to your organisation. Give practical reasons linked to better outcomes and ethical reasons too.

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## A LOST DECADE

Wasting talent is a persistent problem in the UK economy. Our research shows that, while one in four working people in the UK are managers, there is long-term under-representation in these management positions. Over the last ten years:<sup>38</sup>

- The proportion of women in management roles has only increased by one percentage point to 41% since 2011, although there has been a rise in women taking senior management roles, which has increased from 33% in 2011 to 38% in 2021.
- We have seen little growth in the proportion of disabled managers. There are 65,000 more disabled managers today compared to 2011, but there are a million more disabled people in the labour market as a whole. This translates to an 8% increase of disabled managers compared to a 32% increase of disabled people within the UK working population.
- While there has been progress on increasing ethnic diversity within the management population, some people still appear to be excluded. Currently, 12% of the management population are from diverse backgrounds, just one percentage point below the UK working population (UKWP) of 13%. This compares to a gap of two percentage points in 2011 (8% of managers were from diverse backgrounds compared to 10% of the UKWP). The majority of the increase is from Indian (increasing by 110,000), Black / African / Caribbean / Black British (increasing by 75,000) and Mixed ethnic backgrounds (70,000). Despite this progress, those from Black backgrounds are under-represented at senior management level and those from Pakistani backgrounds are under-represented at senior and middle management level.
- The proportion of individuals from lower socio-economic backgrounds has declined over the years within the UK working population, but the decline is greater within the management population falling from 1.8 million in 2014 to 1.6 million in 2021 (19% decline) compared to a decline of 12% within the UKWP.





“Leaders need to be constantly horizon-scanning, and thinking about what is coming down the line - do I disrupt or do I get disrupted?”

Monica Chadha, non-executive director and CMI advisory council member.<sup>39</sup>



“Probably as I’ve come across the 50 line, I start getting really personal insight into what it feels like to be generalised, and what it feels like to be made assumptions of. Now, I start getting a personal feel for how profoundly troubling it is.”

Paul Geddes CCMI, chief executive, QA Education.<sup>40</sup>



## INCLUSIVE PRACTICE: THE BEDROCK OF MODERN MANAGEMENT

CMI’s Professional Standard sets out best practice in management and leadership. In parallel with our 75th anniversary project, we have been updating our Professional Standard.

Among the 80-plus employers we consulted<sup>41</sup> for this review, “inclusive practice” was frequently cited as one of the top three skills needed by managers and leaders over the next five to ten years.

This employer feedback informed us that managers and leaders need to have an EDI lens when considering all their actions and behaviours. Similarly, managers and leaders need to be held to account for making inclusivity and equality of opportunity happen, embedding fairness, consistency and challenging biases. As Deanna Oppenheimer,<sup>42</sup> chair of two FTSE companies, outlined in her Leading Lights interview with Ann Francke OBE: “Inclusivity is one of the jobs of the modern chair, the modern manager. It is not just putting forth your view, but it’s how are you bringing out the best in all those views that are represented at your table?”





# THIS IS WHAT CHANGE LOOKS LIKE: A NEW MODEL FOR INCLUSIVE LEADERSHIP



Elements of good practice	Moving from EDI-compliant leadership	To	Genuinely inclusive leadership
<p><b>1.</b> Process-based v. holistic leadership</p>	<p>EDI strategy is led by a senior leader likely HR, legal or governance. They're seeking to close gaps between protected characteristics.</p>	<p>&gt;</p>	<p>Leadership is about collaboration and consultation with staff, encouraging sharing ideas, commitment and participation in decision making.</p>
<p><b>2.</b> Strategic awareness and integration</p>	<p>Commitment to EDI compliance is a legal and regulatory necessity.</p>	<p>&gt;</p>	<p>Leadership understands both the ethical and business case for EDI and policies and initiatives integrated into talent management strategy.</p> <p>There's genuine awareness of how different characteristics – age and gender, for example, interact, and how this interaction impacts on EDI strategy or action plan.</p>
<p><b>3.</b> Data</p>	<p>Data is collected but it's not comprehensive.</p> <p>There's limited organisational understanding of how to interrogate and use this data with limited top-down action plans.</p>	<p>&gt;</p>	<p>You've got comprehensive and transparent data collection with an associated action plan.</p> <p>There's company-wide understanding of why data is collected and how it will be used to improve representation and inclusion.</p> <p>Data strategy is integrated into talent management strategy.</p>
<p><b>4.</b> Deliberate practice</p>	<p>There are targeted, often HR-led initiatives to close gaps between certain groups, but these are not necessarily integrated into wider corporate strategy.</p>	<p>&gt;</p>	<p>Your organisation has deliberate practice that takes an approach based on individual needs – rather than group difference.</p> <p>Leaders and senior managers consistently role-model inclusive practice, challenge bad behaviour, and are consciously building an inclusive culture.</p>
<p><b>5.</b> Building trust</p>	<p>Relations between managers and staff are either rigidly structured around task delivery or have little structure. Limited transparency across the organisation on how, why, and when decisions are made, and few opportunities for staff to feel safe to articulate the challenges and barriers they are facing.</p>	<p>&gt;</p>	<p>Practise active listening, responding to and acting on feedback, willingness to listen and learn especially around language and lived experience.</p>



## INCLUSIVE LEADERSHIP CASE STUDY: NEON EIGHT TECHNOLOGIES

*Mauro Orru is the managing director of investment group, Neon Eight Technologies, that specialises in online gaming platforms and software. He has held the role for eight years.*

Mauro has spent the last eight years building a company that thrives, in large part, because of its inclusive and diverse workforce. The company was founded in 2014. It had three employees. Today it employs 350 people globally, in offices in the UK, Romania, Dubai, India and China. In 2022, it will see expansion across Australia and into the US. Mauro directly attributes the success of the business to its strength in its diversity; it creates an environment of engaged and productive employees, in whichever territory it puts down its roots.



### **Attract, retain and protect**

Mauro experienced homophobia in his early professional life, including being quizzed about his sexuality during an interview with a FTSE 500 company. Promptly ending his engagement with those companies when the incidents occurred, he felt they had lost out on something extremely valuable to any organisation: talent.

He now believes that it is impossible for a company to succeed if they do not attract, retain and protect the very best people they can find. And to find them, you must look everywhere and exclude no-one.

Mauro recounts the difficulties of recruitment in a sector that has historically attracted mainly male employees. Despite creating gender-neutral job roles and anonymising every application before it is considered, male applicants tend to have accumulated more directly relevant experience than women. To counter the bias, he encourages his managers to hire laterally and dig out transferable skills and experience from other sectors to add to their team.

### **Lost in translation...?**

EDI challenges present themselves differently in different global regions, says Mauro. While nurturing an inclusive culture in his China office, Mauro realised there was no easy translation for “gender neutral”. Job adverts could therefore not be constructed in a gender-neutral way as per their global policy; the terminology simply didn’t exist. To get around this, he made careful choices when hiring translators, and adapted local hiring practices.

While expanding across Eastern Europe, Mauro realised that location matters; setting up their offices in Cluj Napoca, a vibrant university town, attracted progressive, liberal thinkers who are receptive to the organisation’s inclusive approach.

### **Cultural propagators**

The organisation invests significant time and money getting its senior management teams right. Through lots of time spent with the company in social and team-bonding events as well as careful pathways for promotion, HR managers identify members of staff who will be propagators of an inclusive culture within their own team. The organisation enables regional management to take immediate disciplinary action over inappropriate behaviour, which Mauro believes to be just as effective a communication of their values as the visibly diverse team of board members and the posters, leaflets and printed material that are present in all offices. Every team has access to a list of local charities and support groups, and Mauro engages directly with non-government organisations (NGOs) as well as reputable chartered bodies such as CMI to keep his teams well informed about issues concerning minority groups.

Inclusive practice is at the very heart of Mauro’s organisation, permeating all policies and activities.

“The benefits of a good EDI policy is the ability to attract better talent,” he says. “People are smart because they are smart. We need our people to be really smart, and you can’t possibly determine where those people are going to come from... if you are going to be restricted in terms of the people you can attract, retain and protect within your business, then what are you doing?”



# THESE CONVERSATIONS MAY FEEL UNCOMFORTABLE

At first glance, the numbers related to workplace inclusivity look encouraging. According to CMI's research:

- 93%... of respondents agreed that their organisation is inclusive of all staff regardless of sexual orientation.<sup>21</sup>
- 91%... regardless of gender.<sup>22</sup>
- 89%... regardless of their gender identity.<sup>23</sup>
- 88%... regardless of their ethnicity.<sup>24</sup>
- 85%... regardless of age.<sup>25</sup>
- 83%... regardless of their socio-economic background.<sup>26</sup>
- 81%... regardless of disability.<sup>27</sup>

Most organisations say a lot about inclusivity but do much less. Targeted initiatives that are known to close gaps for under-represented or disadvantaged groups are rarely deployed. As a result, many people still feel overlooked, others never get a look-in when it comes to recruitment or progression; many suffer day-to-day indignities. And the economy continues to under-perform.



## CMI's member polling found that:

- There is an assumption that socio-economic diversity can be achieved through general approaches towards promoting diversity and inclusion.<sup>50</sup>
- Managers remain unable to pinpoint specific initiatives that are known to close pay and progression gaps within their organisation such as mentoring and sponsorship initiatives.
- The majority of respondents (74%) in our socio-economic background poll,<sup>51</sup> and over half of respondents (53%) to our ethnicity poll,<sup>52</sup> either said their organisation was not taking active steps to increase the proportion of employees from a lower socio-economic background or diverse ethnic background through its recruitment practices, or they did not know if their organisation was taking active steps.
- Two-thirds of respondents (66%) said their organisation either had no initiatives around disability in the workplace or they did not know if they had any initiatives.<sup>53</sup>
- Two in five (43%) respondents said their senior management teams had no staff from diverse ethnic groups.<sup>54</sup>

CMI believes that we need a nationwide set of (almost certainly uncomfortable) conversations – to help shift individual managers and organisations from tacit agreement to concerted, deliberate action to build the Everyone Economy.

These conversations have the potential to shift attitudes and cultures that are stuck in this awareness-no-action loop. Although policies and initiatives are important, culture is key to delivering inclusive workplaces and securing access to opportunities for all.

These conversations will help to shift poor cultures in which people feel worried about requesting adjustments; don't speak to their manager about the support and help they need. Ultimately, without these conversations, we'll prevent organisations from making the most of everyone's skills and expertise.

### Have the conversation, don't quibble about the terminology

The language around equality, diversity and inclusion is ever-changing – and the subject of sometimes fierce debate. Previous CMI research *Delivering Diversity* found that one of the biggest challenges in promoting diversity in the management pipeline was uncertainty over what language or terminology to use. People will look at the controversy over the term "BAME" (until recently the umbrella term for people from a Black and/or minority ethnic background) and worry that they're about to mess up.

And we believe of course that language is important. Words have the potential to support or indeed hold back individuals in the workplace. As Disability Rights UK<sup>55</sup> notes, "Language is never purely descriptive - it shapes how we see each other, the value we place on different identities, and sometimes how we behave".

But, having consulted with many managers, leaders and employees from many diverse and minority groups for this research, it is our view that the important thing is for organisations to have those conversations in the first place, albeit respectful ones. Only then can they understand how to make sure that every individual feels valued and respected. Different organisations may settle on different terms; the important thing is to have the conversation.

*"If you ask somebody generally one-to-one, they do open up. Sometimes they may not be comfortable talking about it, and I would definitely say if I had to give advice – don't do it in a crowded room, do it one to one over a coffee or a glass of wine or something"*<sup>56</sup>

**Byron Dixon OBE CCI, Leading Lights interview with Ann Francke OBE, May 2022**

For a fuller note on terminology and a glossary of terms used in this report, please see the annex.



## “I CAN’T TALK TO MY MANAGERS”

Laura was diagnosed with autism 18 months ago, three years after joining her current organisation as a first line manager in retail. Since then, she has felt unable to disclose her diagnosis to her seniors.

Despite being a high-performing manager, receiving consistently excellent ratings from staff surveys, Laura fears that other people’s preconceived ideas about autism will put her out of the running for promotions. Laura believes that her senior colleagues see her as awkward and difficult.

With a flair for numbers and organisation, Laura is passionate about her career in management, taking all opportunities to increase her knowledge by doing online research and with the help of an unofficial mentor at work. But she worries that if senior colleagues discover she is autistic, they won’t believe in her capacity to change, adapt and learn. She tries to “mask” her autism at work by behaving as far as she can like a non-autistic person, but she finds it exhausting, referring to it as “retraining her brain” to fit in and succeed.

Laura has suggested to senior leaders that her workplace trains someone to be a go-to advisor for special needs issues and adjustments for all employees with a disability. She feels that would be especially valuable for someone with autism as a person with specialist knowledge could act as an advocate and interpreter, helping to grow understanding and to change behaviours naturally over time.

**Female, 30/40s, front line manager at a large national private sector company (retail)**



## “CONVERSATIONS ARE POSITIVE BUT SOMETIMES MISGUIDED”

Born with spina bifida in the 1960s, Doug feels he’s had an atypical experience of disability all his life; he attended mainstream school and has never been unemployed. Having worked in disability support and consultancy for over 30 years, he is now a staff disability adviser at a university.

As for his own experiences, Doug has generally had “positive, if sometimes misguided” interactions with his employers and colleagues. That said, he has found himself on the receiving end of employer prejudice, which he still encounters from time to time.

Doug has encountered adjustments for disabled colleagues being thought of as too costly, with expensive software being required or additional time needed for disabled employees to carry out their work. However, they are valuable and necessary steps to take to create an equal and inclusive culture, where all employees can achieve to their very best level.

Above all, Doug encourages conversation. He urges leaders to create a culture in which people feel comfortable to disclose their disabilities and then seek appropriate adjustments or support. And he sees this as a cycle – the right environment would be created by having greater visibility of disabled individuals in leadership roles, and to get there, all disabled colleagues should be able to have clear pathways, with any necessary adjustments made, for their career progression.

**Male, 50s, staff disability advisor at a large university**







## EVERYONE DESERVES THEIR OWN CONVERSATION

Each conversation will be different. Some characteristics are not immediately visible. Reflecting on his own experiences as an LGBT individual in management and leadership, Adam Marshall CBE, former director-general of the British Chambers of Commerce, said: “One thing that a lot of gay people face is they have to come out all the time in the workplace. It happens over and over and over again in workplace relationships, and that is part of their journey through their working lives. That will be different to someone who perhaps faces barriers to inclusion because of geography or social mobility, for example, or because of gender. So every characteristic, every difference can have some very specific experiences as well.”<sup>57</sup>

The former UK education secretary Justine Greening said in her Leading Lights interview: “sometimes people feel a bit awkward talking about background. And in a way, it’s one of the hardest things. If you walk into a boardroom and there’s no woman or there’s no one from an ethnic minority, you know that, you can see it with your eyes. But actually, I think one of the reasons in particular socio-economic diversity has been really tough is that it’s not obvious”.<sup>58</sup>

Managers and leaders should be careful not to assume that because a characteristic is visible it is easier to manage; it’s important to find out what specific support will be helpful for the individual.



*“One of the problems that I sometimes find is that because I have a visible disability people assume that they understand what I need. And sometimes these assumptions can result in a kind of discrimination that is quite difficult to manage: people are trying to help – like offering to push your wheelchair – but I don’t need people to push my wheelchair. And to say ‘sorry, actually that’s not really good enough’ seems churlish, but if I don’t say anything how will people know?”*

**Dr Alice Maynard, CMI advisory council member**



## INCLUSIVE CULTURE CASE STUDY: SHAW TRUST

*Michelle Jackson is the head of diversity and inclusion at Shaw Trust, where she's worked since January 2019. Shaw Trust is a charitable organisation in the UK that supports people with complex needs into good work. It has approximately 3,500 employees, and Shaw Trust surpluses are reinvested through its charitable Shaw Trust Foundation into programmes to improve prospects for individuals and communities. Clare Gray has been at Shaw Trust for 17 years, and is the organisational lead for disability advocacy, focusing on advocating for disabled people externally, especially with an employment focus.*

Shaw Trust has a stated aim of achieving diversity at all levels, taking proactive steps to remove artificial barriers to progression across the organisation.

The central facet of creating an inclusive culture at Shaw Trust is the clear commitment to diversity and inclusion exhibited by senior leaders. There is a constant two-way dialogue between senior leaders and managers with their staff, and a willingness to work collaboratively to understand and address issues around diversity and inclusion - they are opposed to a top-down approach. One of the best examples of this is their employee resource groups (ERGs). These were initially set up to raise awareness and provide a safe space for colleagues to discuss key diversity issues related to disability, race, women, neurodiversity, LGBTQ+, and menopause. They are now viewed as critical internal consultants. Insights and opinions are requested by senior leaders to address policies, practices, critical business objectives and aid continuous improvement.

ERGs have helped develop and deliver specific training for colleagues, such as neurodiversity awareness training, have been instrumental in ensuring processes for providing reasonable adjustments are fit for purpose, and have informed discussions about language around ethnicity.

To ensure all staff understand the importance of an inclusive working environment from the start, Shaw Trust has introduced a mandatory training session for all new and existing employees called 'Why Inclusion Matters'. This is reinforced in their annual appraisal process.

Senior leaders support group-wide awareness raising sessions and share their lived experiences in order to model the inclusive culture they are developing. For example, one senior leader has shared her experience of the menopause during a menopause awareness session, and this resulted in a menopause support group being set up. Another senior leader shared his experience of managing his

mental health during a Mental Health Awareness Week event, which led to an increase in colleagues sharing mental health struggles and in them seeking support from the company's Health and Wellbeing Team. Shaw Trust reports that having these open discussions has made staff feel more comfortable to share their lived experiences which the company can then act on.

### Data

Shaw Trust is committed to having a diverse workforce at all levels of the organisation. Qualitative and quantitative sources of data are used to assess progress and establish trends. These include staff surveys, feedback from ERGs, monitoring of the employee lifecycle, including recruitment, take up of development opportunities, progression, appraisal scores and leavers.

Shaw Trust actively campaigns internally to encourage employees to share their diversity data. They have launched campaigns to explain the importance of data and how it will be used and have shared trends and analysis internally. Leaders have also shared why they have been prepared to share their data. As a result, there has been significant reduction in the numbers of staff unwilling to share EDI data. Numbers have declined from 28% pre 2021 to 4% in 2022, and there was a 6% increase in colleagues willing to share that they are disabled.

### Representation and progression

To reflect and demonstrate the organisation's commitment to EDI, the organisation diversified their Board. They worked with an executive search firm specialising in recruiting diverse senior leaders for Board positions, and because of this positive action, 40% of the Board are now female (an increase from 20% pre-2021), and 33% from ethnically diverse backgrounds (an increase from 20% pre-2021).

In terms of progression, their strategy is to develop and promote from within the organisation to demonstrate the value placed on existing employees. The main strategy is to diversify the talent pipeline, particularly into senior roles. A range of formal and informal development opportunities exist to give colleagues at all levels of the organisation, the opportunity to gain the skills and experience required to progress. Examples include accredited and non-accredited management development programmes for people at all stages of their career, a Future Leaders programme preparing existing leaders for c-suite positions, a shadowing programme with a senior leader, secondments, and a mentoring programme.

## OPEN LEADERS, POSITIVE CULTURES

Company culture is intangible and complex, but individual leaders and managers can make or break whether an organisation recognises, values and champions diversity of thought, opinion and background. A leader who is open to addressing inclusion and maximising talent will inspire others to do the same.

David Blackburn is chief people officer at the Financial Services Compensation Scheme, which is regularly cited as one of the UK's most inclusive employers. He told us<sup>59</sup> that senior leaders at FSCS regularly encourage open conversation and discussion, by sharing their own lived experiences internally and externally. Employees are encouraged to speak to their managers to discuss any support they require – the objective is to provide a workplace culture where people can be as open as possible “and not feel alone”. They want everyone to be able to be themselves at work.

A culture where leaders – at all levels and from all backgrounds – feel confident and safe to disclose their own lived experiences will empower other employees to do so and to ask for the support they need. A high-trust, supportive culture may also help to address ‘imposter syndrome’ – an experience that is common among UK workers and leaders, but exacerbated if one identifies as an under-represented or disadvantaged group at work.<sup>60</sup>

Managers may need to explain the complexity of some inclusion issues to senior leadership. This way, you'll drive improvements and hold the company to account for its actions. Angela Matthews, head of policy and research at the Business Disability Forum,<sup>62</sup> observed: “It's generally senior managers writing the inclusion agenda, not senior leaders – which means that senior managers are trying to communicate inclusion downwards as well as upwards. Senior managers struggle to get senior leaders to talk about interlinked areas such as menopause, disability, and well-being.”

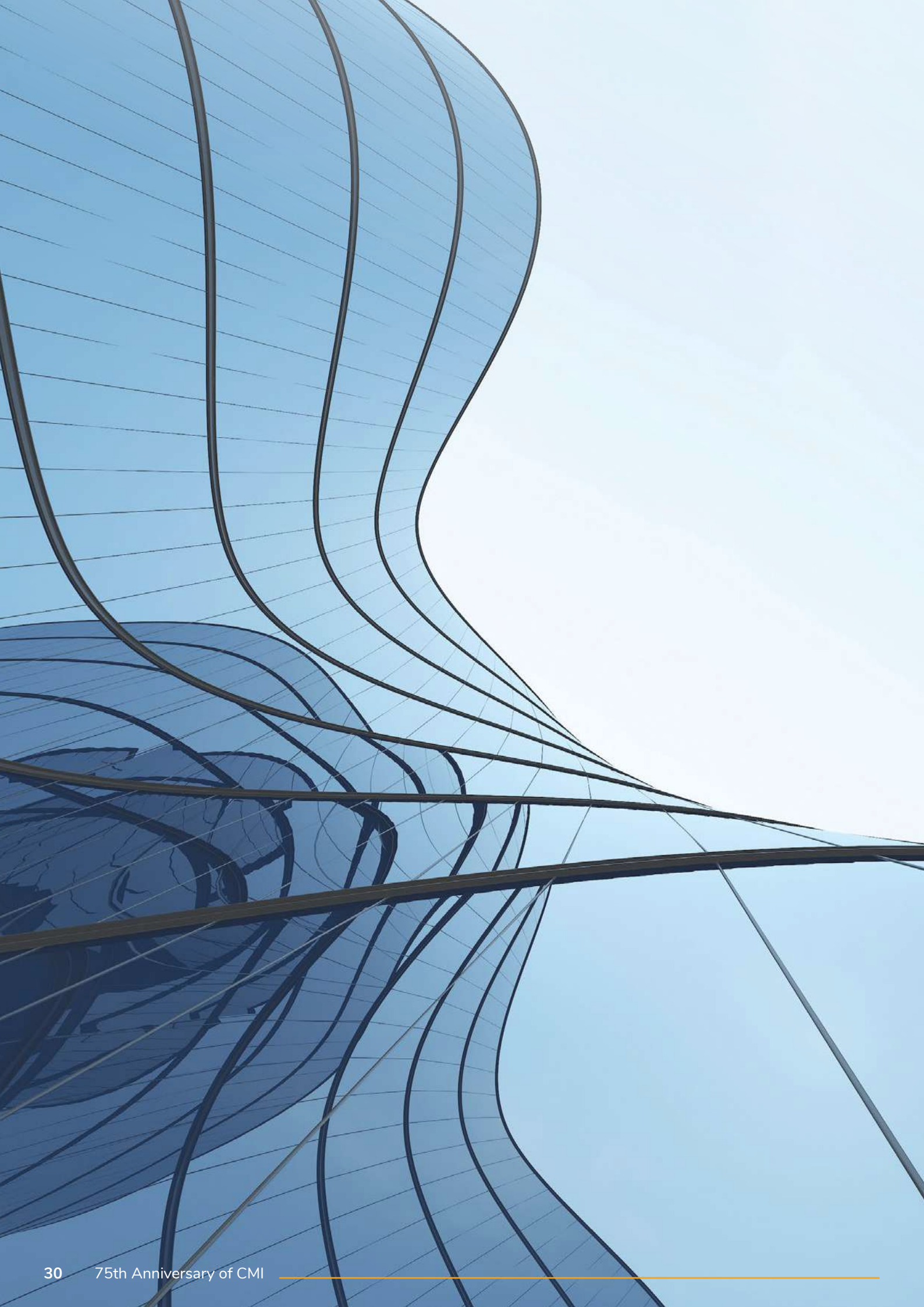
“Where inclusion is concerned it's important to note that embarking on culture change will likely bring significant changes to the way things are done in the organisation, and this may make some people feel very uncomfortable or unsure. Having a clear explanation for why you have embarked on this journey, and engaging your employees on how you will achieve your ambitions is essential, otherwise the change you are looking for is unlikely to come about”

**Sam Budd CCMI, inclusion consultant  
and director of SB Strategic  
Consultancy**

“What we are trying to build here is collective emotional intelligence. Part of it is really just encouraging people to come out to have a conversation. We are all trying to be more empathetic and get to a position that you put yourself in somebody else's shoes, even though it's not something you've lived. And part of that is allowing that curiosity of thought and curiosity of discussion and constructive questioning”<sup>61</sup>

**Teddy Nyahasha, chief executive,  
OneFamily, Leading Lights interview  
with Ann Francke OBE, May 2021**









## “COME AND TALK, LISTEN AND GET VIEWS FROM THE GROUND”

For one of the people we interviewed for this report, his location played a big part in whether he felt able to achieve his best at work. James is an operations manager for a charity that works with people with disabilities, and has worked in the third sector for the majority of his professional life.

Working in what is referred to in Northern Ireland as a ‘blow in’ – a British organisation which has expanded into the area – James has been frustrated at the lack of understanding from England-based management teams. Wider organisational policies may fall short and not adequately serve Northern Ireland-based offices, including recognition of Irish bank holidays and cultural nuances.

James would like England-based management

**Male, 30s, operations manager at a large national charity**

teams to connect more meaningfully to all of their offices in devolved nations and the Republic of Ireland and to demonstrate a more complete understanding of the context that they operate in. The knock-on effect will be to have a more thorough understanding of the intersectionality (see glossary) of EDI issues, and of the inadequacies of ‘one size fits all’ approaches.

“What I would recommend for any organisation who has some presence in Northern Ireland, that somebody is coming over to visit, the chief executive, or director of HR, or trustees. Come and spend a day or two here, once or twice a year. That’s all it needs to be, and allow some meaningful space to specifically talk about those issues. Just do a sense check of, ‘Are we doing things right?’ Because they’ll get that from the people on the ground.”



# CTRL+ESC: CAN TECHNOLOGY HELP BEAT BIAS?

Some organisations are using technology to identify, monitor and challenge unconscious bias.

The human resource information system (HRIS) platform Workfinder enables subscribers to see if decisions being taken by their staff appear to have bias. The technology then provides advice and guidance so that behaviour can be corrected. For example, colleagues are notified if a hiring bias has been detected, such as extending job offers to a significantly greater proportion of men than women.

Other organisations are using virtual reality (VR) to identify and tackle workplace barriers. A PwC study found that three-quarters of learners undergoing VR training said they had a wake-up-

call moment and realised that they were not as inclusive as they thought they were.<sup>63</sup> Google and Amazon are also set to enhance diversity efforts through VR.<sup>64</sup>

Managers need to put data protection at the centre of any technology-based approach: much of the data collected for EDI initiatives is sensitive, or what UK GDPR terms “special category” data. There are other challenges to using AI and machine learning; research by WorkRise indicates that, without management controls, algorithmic tools may replicate or exacerbate human biases in the hiring process, such as reflecting flawed assumptions of who makes a “successful” hire and historic patterns of privilege or disadvantage.<sup>65</sup>



## BIAS-BEATING TECHNOLOGY CASE STUDY: BENJAMIN OGHENE, DIRECTOR OF DIGITAL SOLUTIONS, VIALTO

When Ben Oghene started working for a big four accounting firm in central London, it was a significant achievement for him and his family. Ben grew up in Harlesden – a deprived area of west London where there were few professional role models.<sup>66</sup> One day he was on his lunch break when two police officers pulled him aside and told him that he fitted the description of a suspect wanted for armed robbery in the area. He was taken to the police station and kept for 23 hours before being released without charge.

The experience made Ben think about the types of biases we have as humans, and the lack of opportunity to address or prevent the negative impact of these biases towards under-represented or disadvantaged groups. So a couple of years ago, alongside greater public interest in inequality issues, Ben got involved in researching what technology might actually address these

problems and deliver change. He discovered that a lot of people were talking about tackling bias, but we weren't seeing significant change.

Ben, who has a background in computer science, started working on solutions. One tool he helped to develop can mine the digital footprint of the user – emails and chat messages, for example – to identify whether individuals act differently towards different groups of people. This insight enables the employee to become aware of their inherent biases, how they might affect others, and steps they can take to address these, including training materials.

He's also involved with developing a VR experience that puts you in the shoes of a different demographic group, so that you can experience the world as others experience it, and witness how you're treated differently.

# FROM AWARENESS TO REAL CHANGE: ACTIONS FOR MANAGERS AND LEADERS

Time now for action. While the 'Everyone Economy' is a national aspiration, it's within the gift of individual managers and leaders to accelerate progress.

In this section we'll draw on the many positive actions and techniques that the CMI community has shared with us during our 75th anniversary year. We'll look in particular at:

1

Addressing assumptions and building awareness

2

Gathering meaningful data and insight

3

Identifying and attracting talent

4

Realising people's full potential

5

Everyday actions to build an everyone organisation

“

*“You do not change the diversity of your organisation by just writing down the words ‘I want to have a more diverse organisation’ – you have to set targets, you have to think about the recruitment pipeline, and the barriers to progression in your organisation.”*

**David Blackburn, chief people officer at the Financial Services Compensation Scheme (FSCS)**

”



## 1. Addressing assumptions and building awareness

This research has revealed that many managers and leaders do not fully acknowledge their own and their organisation's inclusion challenges. They make positive assumptions when the true picture is more bleak.

We found, for example, that employees were more likely to report their organisation was inclusive if they perceived co-workers to be similar to them; whereas organisations where co-workers perceived greater differences reported their organisations were less inclusive.<sup>67</sup> Put another way: more diverse organisations were seen as less inclusive; whereas more homogenous organisations were seen as more inclusive. This also illustrates why diversity, inclusion and equality are important in parallel.

Or to put it bluntly: we've got way further to go than we're prepared to admit.

False assumptions have dangerous effects: they undermine trust and workplace culture; they limit people's willingness to share information and data. So, addressing assumptions and building genuine awareness of your organisation's true inclusion picture are important first steps in trying to maximise talent.

On an individual level, we all have biases and it's important to be conscious of these. Do you, for example, tend to choose to hire a young person for an entry-level role when an older person may be just as suitable? Do you promote ethnic or gender diversity over and above other characteristics? Recognising we hold bias is the first step to mitigating it.

## 2. Gathering meaningful data and insight

Having the right data and information is a crucial starting point for identifying and understanding the disparities between groups and individuals and their impact on inclusion and performance.

*"Companies today acquire data about virtually everything else, so their failure to track diversity statistics sends a message of indifference – or, worse, may be taken as evidence that the company has allowed bias to flourish."<sup>68</sup>*

**Professors Joan C Williams and Jamie Dolkas,  
University of California-Hastings**

Our research finds that employees are overwhelmingly in favour of collecting better data:

90% of UK employees who said their organisation collected data said they were comfortable providing this data. (Important side note: this number was lower for LGBTQ+ (77%) and people from Black backgrounds (77%). This percentage was not affected by whether the purpose of data collection had been communicated.<sup>69</sup>) Legal requirements such as gender pay gap (GPG) reporting are helping organisations with acceptance when gathering important baseline data.

Collecting data is just the starting point; leaders also need a plan, a purpose for how the data is going to be used. This purpose should be communicated so that employees understand why you're collecting the data, how it will be used, and how data-collection aligns with the organisation's ambitions for change.

*"Data can play a really crucial role. I think data has been fantastic in telling organisations where they are, and it also sets benchmarks, but it's not the whole story."*

**Cindy Rampersaud CCMI,  
non-executive director, Leading Lights  
interview, January 2022<sup>70</sup>**

### Data as change agent

As part of its journey towards becoming more diverse and inclusive, the insurance group Aviva has chosen to publish its ethnicity pay gap as well as gender pay gap data; disability pay gap data will follow. Collecting and publishing that information is part of its EDI strategy, and it publicly holds the organisation to account for making improvements to hit its ambitious equality targets. Aviva has committed that 40% of its leaders should be female; and 13% ethnically diverse, aligned with recent census statistics.

For data collection to be meaningful and not just a box-ticking exercise, employees need to feel comfortable about providing their data and their real views. As part of its effort to build a high-trust culture, the Financial Services Compensation Scheme (FSCS) undertook a three-month targeted campaign to reach out to those who ticked 'Prefer not to say' during data collection. The campaign focused on explaining to staff the need for higher response rates so the organisation could be aware of the full extent of barriers in the workplace for their employees. The campaign was led vocally by senior leaders. By clearly communicating the reasons and vision for the data collection, the FSCS saw a 24% increase in employees completing all sections of their personal profiles: ethnicity, religion and belief, disability, and sexual orientation.<sup>71</sup>

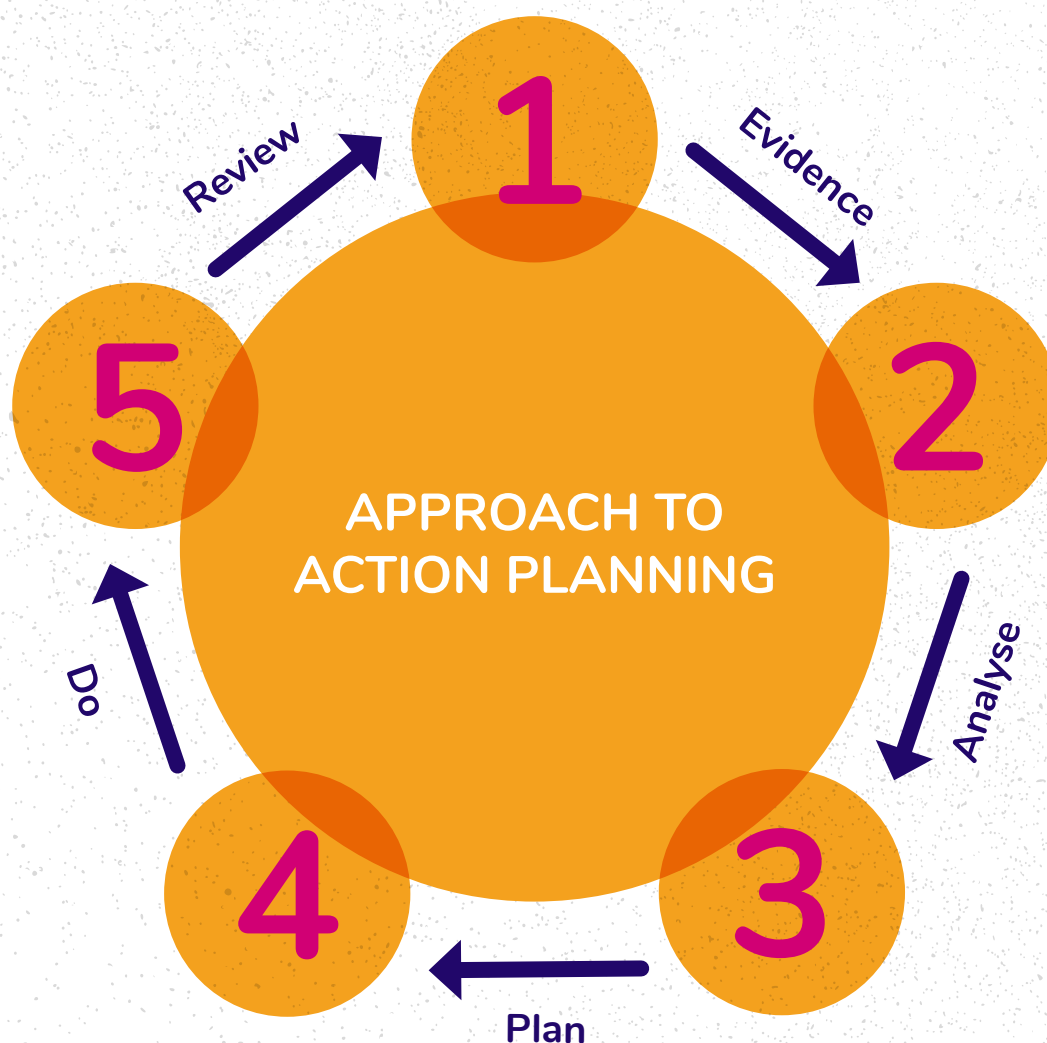
## “DATA IS JUST THE START”: AN ACTION PLAN FOR CHANGE

An action plan is useful to prioritise activities that are based on an organisation’s specific context, strengths and weaknesses.

This approach also serves to empower employees to actively play their part because all employees have a role in building and sustaining an inclusive workplace.

It’s useful to think about this process using the evidence - analyse - plan - do - review - continuous cycle as an approach to planning and making progress, and checking your approach along the way.

We have put together a guide for action planning to help you on your way - you can find it at [managers.org.uk/75years](https://managers.org.uk/75years).



## ACTIONS FOR LEADERS (SMALL, MEDIUM AND LARGE BUSINESSES)

- Research the EDI strategies of leading organisations. Look at how your own organisation can learn from good practice – and poor practice – elsewhere.
- Make the data you collect proportional to the size of your organisation. Not everyone needs to collect every indicator. Start by looking at the background of current, new and unsuccessful applicants to identify if there are any patterns of bias in the recruitment process.
- Move away from presenteeism as a performance metric and introduce greater flexibility in where and when work is done. Even for those that need to remain on site to carry out their role, flexibility can improve your chances of attracting and retaining a diverse talent pool.
- Set a date each year to review what data you've collected and progress against any targets.
- Utilise coaching techniques to help staff adapt their approach to de-escalate and diffuse challenging points of learning.

## HOW TO: USE DATA TO BOOST INCLUSION

1. Review what data you are collecting and why, remembering that data isn't just hard information such as numbers and percentages. Cultural information such as understanding 'what it feels like to work here' from different viewpoints is also very important inclusion data.
2. Ask yourself:
  - a. Does your existing data give you the information that you need to address any inclusion concerns?
  - b. How do you use the data that you do collect?
  - c. Do you triangulate that data i.e does the quantitative reflect the qualitative and is this what you see?
  - d. Are you cross referencing your data to understand whether issues are shared by different people or across more than one group of people?

## ACTIONS FOR LEADERS (LARGER ORGANISATIONS)

- Make sure your organisation is collecting the right data and that whoever is responsible for collecting the data has considered how intersectionality might impact how and what is gathered. Collect and publish representation and pay gap data as a minimum and use this as the basis for a clear action plan to tackle gaps. Use the annual review cycle to look at key indicators – pay, progression, recruitment, retention etc – to reflect on progress against ambitions.
- Make sure all staff understand why you are collecting data, what you are collecting, and how it will be used so that employees feel confident in disclosing this information.
- Triangulate and benchmark your data – compare data from different sources and gathered at different times, sense check this against others, either in your sector or in aggregate. This will provide a more comprehensive picture of your workforce. For example, is your pay data telling the same story that you are picking up from listening to staff and other organisations in your sector?

### 3. Identifying and attracting talent

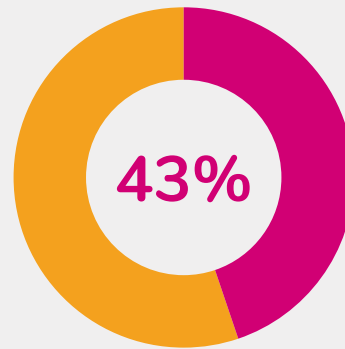
People from under-represented or disadvantaged groups face barriers to opportunity right from the get-go. As just one example, people from ethnic minority backgrounds have to send 60% more applications in order to receive as many callbacks as the majority group.<sup>72</sup> Whether the salary is advertised on a job advert can limit applications from a wider pool of talent.<sup>73</sup> These are artificial barriers to recruiting diverse talent and achieving better business outcomes.

CMI polling found:

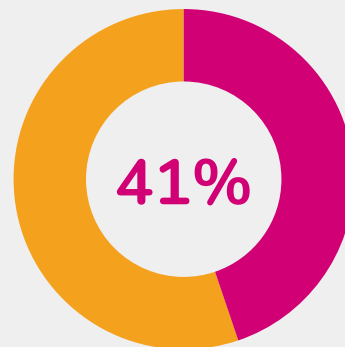
- Half of respondents (55%) in organisations with senior managers from diverse ethnic groups said their organisation was taking active steps through its recruitment practices to increase ethnic diversity, compared to 36% of respondents in organisations with non-diverse senior management.<sup>74</sup>
- Only one in five (21%) respondents said their organisation utilised balanced shortlists to improve gender parity through recruitment.<sup>75</sup>
- Disabled respondents<sup>76</sup> were more likely than non-disabled respondents to say that their organisation created barriers for recruitment for disabled people at entry level (20% vs 9%), at junior/ middle management level (17% vs 6%), at senior management level (18% vs 7%), and on the board of directors or other governing body (13% vs 6%).
- Two in five (43%)<sup>77</sup> said their organisation routinely asks for applicants to have a degree as part of their recruitment process.
- Two in five (41%) respondents said their organisation collected age data, through the recruitment process regardless of whether candidates are successful or not.<sup>78</sup>

Research shows there are practices that organisations can adopt that are proven to help diversify recruitment and attract a wider spectrum of applicants; these also enable such applicants to then progress within the organisation. For example, the Behavioural Insights Team worked with Zurich and John Lewis to advertise part-time working by default on job advertisements. By explicitly offering the option of part time working, these employers saw a 50% increase in the number of applications per vacancy, and an increase in applications from women to senior roles by 19% (Zurich) and 35% (John Lewis).<sup>79</sup>

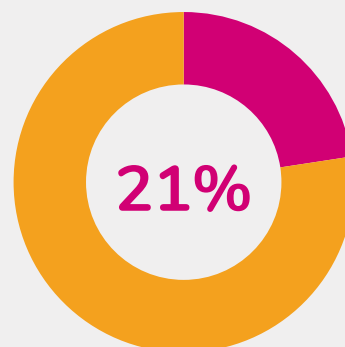
Figure 8: Initiatives taken by organisations



of respondents who said their organisation routinely asks for applicants to have a degree as part of their recruitment process\*



of respondents who said their organisation collected age data, through the recruitment process regardless of whether candidates are successful or not\*\*

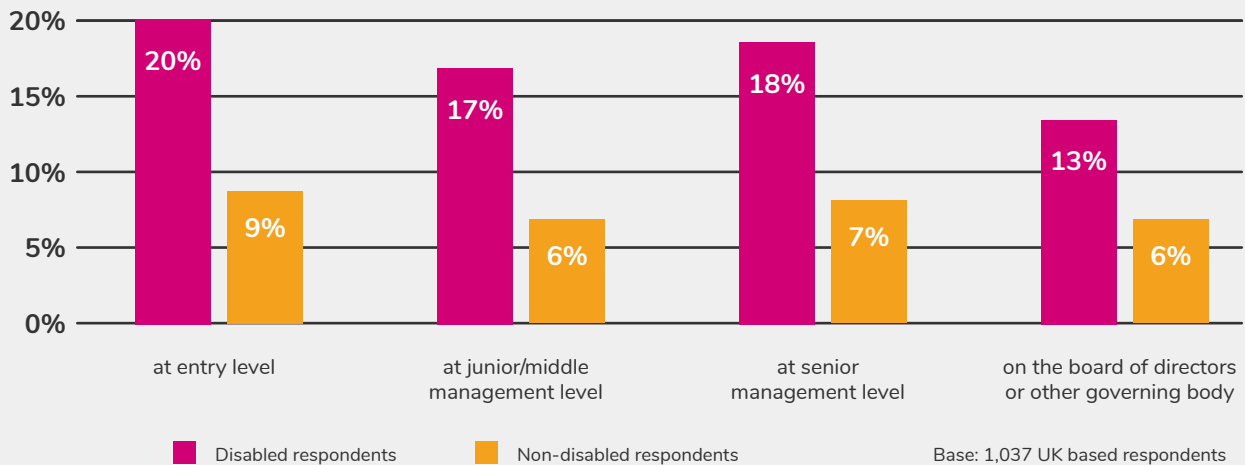


of respondents who said their organisation utilised balanced shortlists to improve gender parity through recruitment\*\*\*

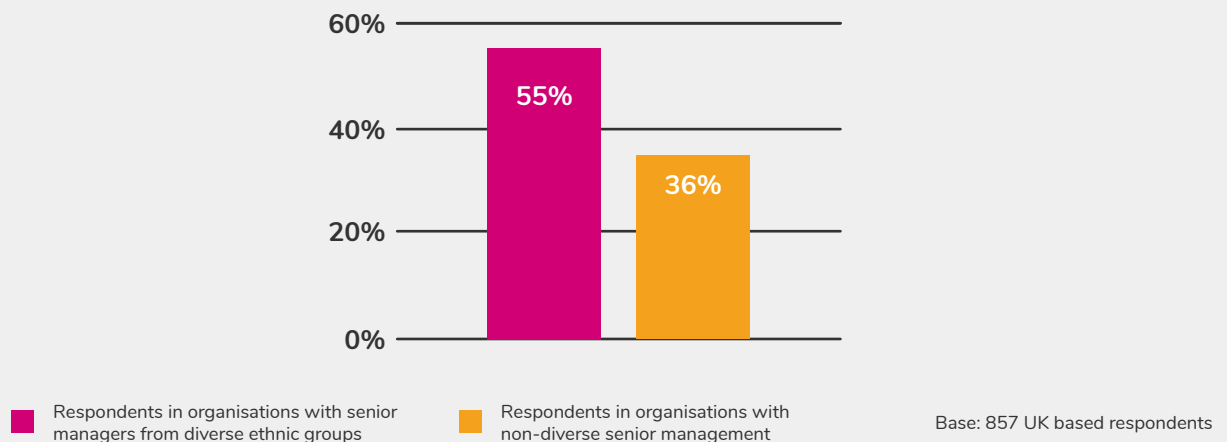
\*Base: 1,162 UK based respondents. \*\*Base: 1,159 UK based respondents. \*\*\*Base: 1,183 UK based respondents.



**Figure 9: Proportion of respondents reporting organisational barriers for recruitment for disabled people across seniority levels**



**Figure 10: Proportion of respondents reporting active steps through organisational recruitment practices to increase ethnic diversity**



## ACTIONS FOR LEADERS (LARGER ORGANISATIONS)

- Integrate EDI into your talent management strategy; consider EDI in planning promotions, development programmes, succession planning and access to workplace support such as networking, mentoring and sponsorship.
- Create learning and development programmes for people with different lived experiences, and make sure managers at all levels are offering training and holding regular career conversations.
- Clearly communicate inclusive initiatives/policies such as equal parental leave, menopause support, and workplace adjustments.
- Introduce or expand mentoring and sponsoring opportunities for staff that factors in intersectionality. This could include the introduction of reverse mentoring initiatives.

## SMALL BUSINESS CASE STUDY: MERLINVET-CEL LTD

Christopher Bainton is one of the Directors of Vetcel Ltd or MerlinVet-Cel Ltd as they became at the beginning of May 2022, which is an SME based in Scotland. The company supports independent veterinary practitioners. They are part of a group of companies coming together under the MerlinVet banner.

### Culture

Vetcel believes it is important to build an inclusive culture from the top of the organisation and this is about treating staff as you would wish to be treated and ensuring that all views are listened to.

To ensure the organisation can make the most of the talent that is out there Vetcel supports widespread flexible working. The company allows part-time working, job sharing and operates a work from home policy to help staff manage work-life balance. This can be particularly important for those with caring responsibilities. Around a fifth of their staff (19%) work modified hours, with 50% of those in management positions.

They have good staff retention and have lost only two staff in the last two years.

Christopher emphasises that skilled staff can be difficult to find, so excluding staff based on any characteristic just doesn't make good business sense. For example, Vetcel takes an inclusive approach to staff of all ages because they value the skills of the individual, without judging them based on their age.

### Recruitment, pay and progression

Vetcel regularly monitors their salary structure to maintain pay equality. They also include an independent advisor in Board discussions on pay scales, pay increases and bonuses.

Annual appraisals are conducted for all staff to focus on areas of development.

Even with a small workforce, Vetcel believes that it is important to include diverse views in the recruitment process as much as possible. When recruiting, Vetcel ensures that shortlists are viewed by up to three different members of staff working in different areas of the business, including a Director and Senior Manager.

Vetcel provides training for school leavers and their Office Manager works closely with a local high school. They also operate a living wage policy. Training school leavers not only helps widen opportunities but can also yield great business results.

Vetcel's workforce has grown by around 10% in the last year. 69% of their staff and 75% of their managers are female.

Christopher states that other small businesses should "never be afraid to search in other industries for the skills that you seek." Being able to pick from the widest possible talent pool gives you a competitive advantage.



#### 4. Realising people's full potential

“Not everybody wants to be a lawyer or a CEO, so we're not trying to make sure everybody becomes this. Whatever these roles happen to be, what we want is people to find what they want and have the opportunity to do that”

**Jeannette Lichner CCMI, board director and CMI advisory council member.**

Getting people into your organisation from underrepresented groups is only the first step. Managers and leaders then need to make sure that these people are seen, heard, enabled and supported so they can flourish – and so the business can capitalise on this talent.

It's clear that employees in the UK see their manager as key to unlocking opportunities at work – training opportunities, stretch projects, promotions and salary rises.<sup>80</sup> But there are still gaps between promises and action. CMI polling found:

- Over half (52%) of disabled respondents<sup>81</sup> who have disclosed their disability to their employer disagreed that their line manager regularly checks in with them more broadly about support for their disability (such as reasonable adjustments).
- Only 15% of respondents to our socio-economic poll said that there was targeted training to employees from lower socio-economic backgrounds such as on-the-job training.<sup>82</sup>

The levels of support different people will need at different stages of their careers will vary. CMI research with the Learning and Work Institute, for example, found that 37% of low-skilled young people said they wanted more support from their manager compared to only 16% of low-skilled workers as a whole.<sup>83</sup> But making progress to close gaps means being proactive about promoting proportionately – not just promoting those that look like the current crop of senior managers. It's also about remembering that progression can happen at any age, any stage; it's not linear. Employers are missing out on talent by assuming that people only want to progress at certain points in the life cycle.

“Fifty per cent of those born today will live to be 100. These longer lives will and should change our approach to achieving and supporting people at work. We could be taking more proactive steps to lighten the burden of people in their 30s and 40s, the age group that often faces the biggest pressures on their time, for example. But as managers and leaders we should be looking beyond different age groups and thinking more creatively about how people work, when they work and the kinds of work that they do”

**Avivah Wittenberg-Cox, CMI advisory council member.**

### ACTIONS FOR LEADERS (SMALL, MEDIUM AND LARGE BUSINESSES)

- Hiring managers need to champion transparent practice around salary and make sure that job descriptions and adverts are inclusive.
- Champion the use of a variety of methods to advertise jobs, such as online job boards and job centres to attract a wider pool of talent.
- Clearly communicate promotion/progression criteria and ensure this is transparent.
- Regularly check in with your staff on how they're feeling in work and outside of work to see if any adjustments or support is needed.
- Implement a process for structured interviews in recruitment and promotions. This involves asking a predefined set of questions and scoring this using consistent criteria.
- Spend time getting to know your colleagues as individuals as well as team members. Be willing to listen and learn from the lived experience of others to help improve your understanding of EDI issues.
- Make sure that meetings, team-building exercises, events, social occasions, and other work activities are scheduled with the needs of individual team members in mind.
- Allow the same amount of 'check in' time for all individuals.



## SME CASE STUDY: G&B ELECTRONICS

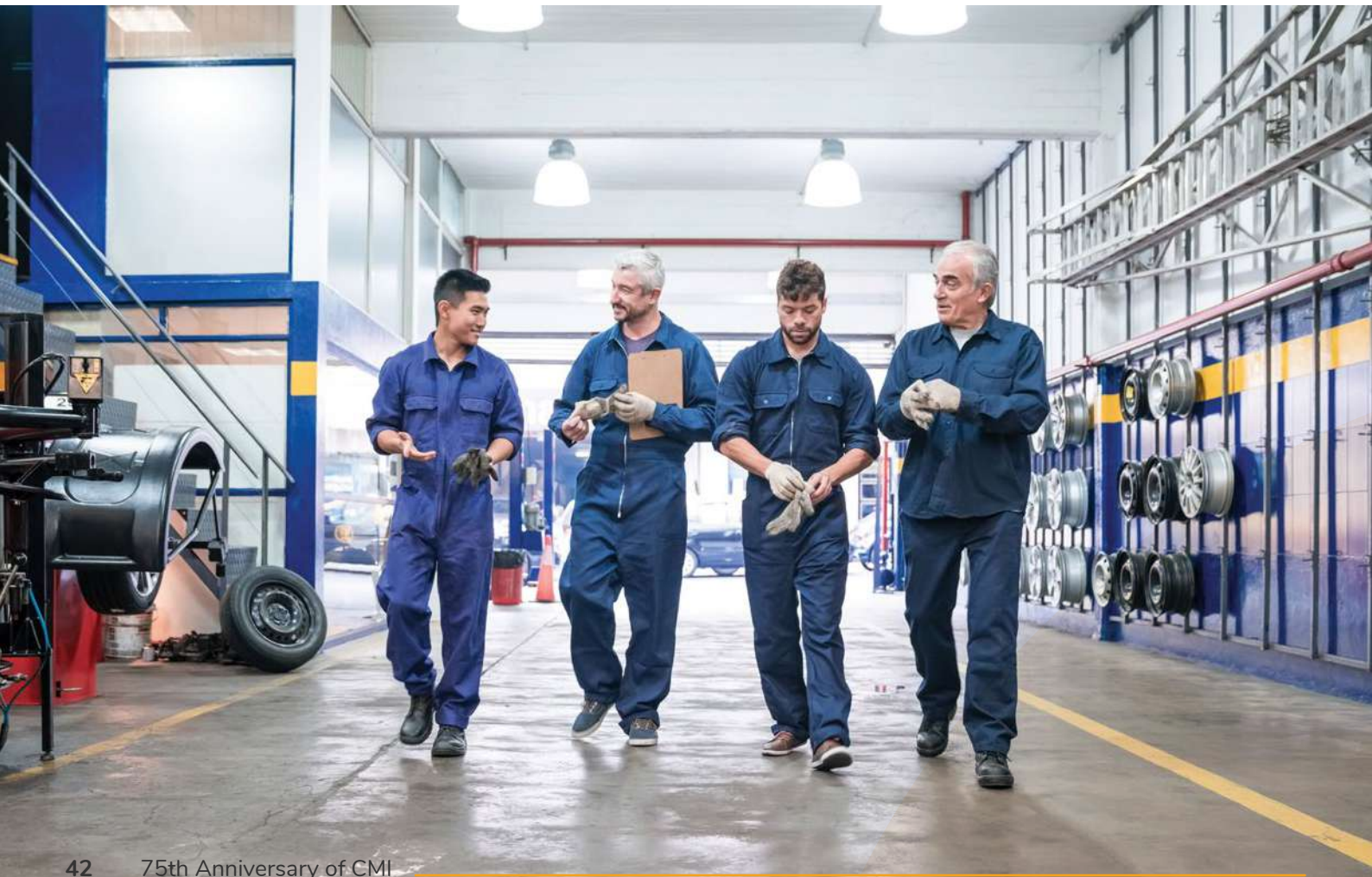
G&B Electronics is a small family run manufacturing company offering printing circuit board assembly services, employing over 50 people.

When Laura McBrown joined her family company, the majority of the workforce was male, with an average age of 50-years-old. “It was a slightly intimidating place at the time”, she admits. After 16 years with G&B Electronics, she took over as the company’s Managing Director and, together with her sister Kate, who is the HR Director, set about to change this culture and establish a place of work where everyone feels like they belong and can voice their opinion and be themselves.

It’s a small company and they don’t have a formal EDI strategy in place. The change had to be done carefully, with listening to their employees and their perspectives at the heart of it. “People are scared of the unknown”, Laura said. “We proactively tried to make people open up and build their confidence.” For example, while recruiting for an engineering role, they knew of a female

candidate who would be suitable but who didn’t want to go for the job because she felt she could only do part of it. Kate worked with the agency to arrange a more informal interview and is delighted to say that she became an effective and popular member of the team.

After six years as an MD, they have a more balanced workforce with women making up around half of the company’s positions including senior management and key roles and the average age reducing. The leadership and development skills programme has been helpful in encouraging their team to be more vocal about their ideas, with the business thriving and winning awards for promoting new ideas and diverse thinking. The safe environment they created has also paid off during the Covid-19 crisis, when, despite big pressure on the team, the company avoided any problems with quality and levels of the production. “By changing the culture and being more attuned to team G&B we have created a real place of belonging”, Laura said.





## 5. Everyday actions to build an everyone organisation

Even if you didn't know anything about this subject before reading this report, you can play a key role in creating an inclusive culture. Individual leadership actions make a difference. So if you're an aspiring manager here are some things you can do to contribute:

- Ask your manager about how best to offer feedback – because this will one day help you to receive it as a manager yourself.
- Take opportunities for learning and development that can improve your understanding of EDI issues.
- Get to know the EDI strategy of your organisation. Compare this to leading organisations.
- Take opportunities to feed back – participate in employee surveys, join employee networks or sign up to reverse mentoring programmes – and ask, how can approaches be improved, how can they be made more visible?
- Keep your eye out for colleagues or friends who may be struggling. Ask them about their experiences, raise awareness with those who may be unaware.

“If a manager is using a shared kitchen, then they should be seen to put the cup in the dishwasher. I know that sounds really silly, but actually that's about demonstrating I'm equal to you. I'm not going to leave my cup on the top because you're inferior to me and you're the one that needs to put it in the dishwasher.”<sup>84</sup>

**Dr Alice Maynard, CMI advisory council member,  
Leading Lights interview, January 2022**





## HOW TO: RECRUIT INCLUSIVELY

1. Review employer brand to ensure that it is inclusive (imagery, language, advert style and placement etc) and check that the core brand is in alignment.
2. Look at competitor analysis/ inclusivity benchmarking including local employers that your organisation competes with for staff.
3. Undertake myth busting exercises i.e what are the myths that exist e.g we can't recruit x type of people because they won't travel here/ there aren't any round here, etc.
4. Engage with internal identity networks and map and understand their experience so as to address any difficulties or barriers they faced.
5. Provide guidance and training to recruiting/ hiring managers particularly in unconscious bias. Good practice suggests that when recruiters/hirers are reminded of their unconscious bias before interviewing they are much less likely to make biased decisions.
6. Aim for diverse interview panels and/or bring diverse views through the recruitment process e.g include the views of focus groups in the process.
7. Review existing recruitment processes to ensure that they are not inherently biased e.g do you ask for graduate qualifications for roles that do not actually require a degree? Do you ask for candidates to do a presentation for roles that will not require any public speaking? You could do this by process mapping and working with identity networks for their feedback on the processes.

## IS YOURS AN INCLUSIVE ORGANISATION? (NO, REALLY, IS IT?)

*If you now want to make changes that will deliver stronger outcomes for your team members and organisation, here are seven questions to ask yourselves...*

1. Are we making changes – workplace adjustments – to remove or reduce a disadvantage related to an employees' ability to do their job? And are these based on individual, not group, need?
2. Are we setting ambitious recruitment and progression targets for under-represented groups? (Remember, these may need to be adjusted relative to your organisation's geographic context).
3. Are we demonstrating inclusive practice and leadership as a prerequisite for promotion and progression opportunities? Have we written this into objectives and performance management?
4. Do we have a good baseline understanding of the legal requirements around equality?
5. Does everyone take care to use respectful language and not make assumptions about people's preferences? Have we listened to colleagues and considered modifying any of our language?
6. Are we transparent in our approach? For example, do we share successes and failures? Are we really creating an environment where employees can give feedback on what is and isn't working for them?
7. Do employees feel empowered and listened to?



## ACTIONS FOR LEADERS (SMALL, MEDIUM AND LARGE BUSINESSES)

- Role-model inclusive behaviour, take responsibility for creating and sustaining opportunities for others.
- Encourage a “speak up” culture to nip poor behaviours and practices in the bud.
- Encourage open conversation among all staff around what is working well and what can be improved.

## ACTIONS FOR LEADERS (LARGER ORGANISATIONS)

- Ensure visible leadership that intentionally sets the tone and culture for your organisation. Clearly communicate your strategy and action plan and report as a fundamental aspect of organisational resilience, adaptation and innovation including in (but not limited to) regular interactions with staff, meetings and annual reports and official documentation.
- Review workplace policies, regulatory compliance filings, and governance practices to ensure they take account of the fact that people may have multiple identities/ face multiple barriers that can influence workplace outcomes.
- Upskill leaders, board members, and managers through regular training, and empower them to facilitate discussions and actions at all levels about EDI. Call on board chairs to conduct EDI audits alongside board skills audits.
- Be transparent with your employees, and create an environment where employees feel empowered to share their experiences in the workplace. Help establish / support / sponsor employee networks eg for disabled employees or for working carers etc.
- Appoint a strategic EDI champion - ideally at c-suite level and at board level and empower the HR department in this area to work with others in the organisation to drive progress. These champions should be expected to act in line with those attributes expected of a Trailblazing EDI Leader - for example, building trust, engaging with staff and advocating for change at executive and board level. They should be tasked with embedding EDI in organisational day-to-day practice not to take responsibility away from managers in their inclusive practice.
- Encourage supply chain companies to sign up to inclusive values and practice. Bigger companies can use their procurement systems to influence wider business culture, including amongst SME suppliers.
- Engage with partners, clients and customers – as well as staff – to ensure you’re delivering against your EDI objectives.



## GETTING IN... AND GETTING ON: HOW LEADING COMPANIES HELP EVERYONE TO REALISE THEIR POTENTIAL

- Setting targets and dedicated programmes: KPMG are aiming for 29% of all their partners and directors to be from working class backgrounds by 2030, and are running dedicated socio-economic background programmes for students.<sup>85</sup>
- Equal parental leave and menopause support: all TSB employees are able to take up to 20 weeks of fully paid parental leave, regardless of gender. In addition to this, TSB has also put in place a package of support for staff experiencing the menopause. This includes a 'Menopause Toolkit' and guidance for managers.<sup>86</sup>
- Learning and development across all levels: GlaxoSmithKline offer a range of tailored learning and development opportunities to its staff including encouraging all employees to create personal development plans and provide tools and resources to help them do this, identify suitable training and development opportunities in support of their plan at regular check-ins with their manager throughout the year, and enabling managers access to leadership development programmes to support them at each stage of their careers.<sup>87</sup>
- Reverse mentoring: ITN relaunched its reverse mentoring programme for the SLT and middle managers, and introduced mentoring for women returning from maternity leave.<sup>88</sup>
- Balfour Beatty have published a time-bound EDI action plan that includes providing inclusive recruitment training within their supply chain, recruiting from diverse talent pools and having a board-level sponsor for EDI.<sup>89</sup>

## INCLUSIVE LEADERSHIP CASE STUDY: HOOTSUITE

Hootsuite is a global social media marketing company, with 200,000 paying customers and millions of users around the world.

The company sees inclusive workplace practices as critical to ensuring its workforce is healthy and productive, and is committed to creating a diverse and equitable environment where everyone feels included.<sup>90</sup> They believe this approach helps to deliver the best products because they are built by, and meet the needs of, the diverse communities they serve. The company, which operates in 13 different countries, implements a tailored approach to inclusion needs in each region through partnerships with global and local organisations, third-party research and employee engagement.

### Recruitment

Setting, tracking and re-evaluating objectives has been key to driving progress and making a positive impact across the organisation. In the beginning of 2021, Hootsuite set a target to recruit close to 400 new employees globally in the first quarter, with 70% from underrepresented groups. They came incredibly close to achieving this goal, hiring 319 new people with 68.8% recruited from underrepresented groups (Women, Black, LGBTQ+, Asian, Latinx, Indigenous people and Neurodivergent individuals). Prioritising a diverse workforce at all levels, Hootsuite also took conscious action to increase its board member diversity in 2021, resulting in a board with 57% of members identifying as from an underrepresented group.

The company is also keen to address unconscious bias across its hiring processes. Through the recruitment journey, the company has implemented a policy in which potential new recruits – as well as internal candidates – must meet with several diverse interviewers (up to seven) throughout the interview process. While this has slowed the recruitment timeline, Hootsuite intentionally took this approach to mitigate bias and improve decision-making, citing it has “slowed down to speed up.”

Gender remains a persistent issue in tech, with women and non-binary individuals largely underrepresented across the industry. To address this, alongside tracking data and participating in events to increase its visibility as an inclusive employer, the company partners with external

organisations like SheHacks and Girls Who Code to offer mentoring programmes to aspiring young people. As well, the company has established a partnership with Pride at Work Canada to support hiring and recruitment efforts.

### Retention

Hootsuite is committed to creating a welcoming, safe and equitable environment for its workforce and has implemented many measures to work towards an equitable environment, including recognizing and addressing pay equality. In 2020, Hootsuite signed the Unbounce Pledge for Parity, adding its voice and actions to organisations prioritising pay parity around the world. In 2021, the company achieved pay equity (ensuring employees of different genders and racial and ethnic backgrounds were being paid similarly for equal work) and is proud to continue reporting pay equity for 100% of employees today.

Hootsuite has also set retention targets across the organisation, with the goal of retaining 80% of its underrepresented groups. To help accomplish this, it has launched Employee Resource Groups (ERGs) to strengthen its internal and external EDI work and connect with employees with lived experiences across the underrepresented groups. The ERGs include members from its community as well as allies, who are valued as changemakers across the whole organisation. The ERGs work on education, awareness and advocacy, bringing in speakers to tell stories of lived experiences to others across the organisation, as well as sharing those of Hootsuite’s own people. This has been instrumental in creating a greater sense of connection and shared empathy across Hootsuite’s workforce.

In addition, following listening exercises with employees, Hootsuite began rolling out new benefits offerings country-by-country based on employees’ unique needs. For example, benefits were adjusted in North America to provide better access to mental health resources, gender affirmation surgery and fertility treatments.

“If you can see it, you can be it. So the more these young people and young women can see that there are underrepresented groups represented at companies like Hootsuite, the more chance there is that they are going to pursue that path.”  
- Tara Ataya, Chief People and Diversity Officer, Hootsuite.

## EDI IN ACTION CASE STUDY: AVIVA

With approximately 18 million customers, Aviva is one of the largest insurance companies in the UK. And the senior leadership team are unequivocal about the commercial benefit of successful ED&I strategies. They recognise that diverse teams reflect the marketplace and with a range of diverse thought and opinion, better business decisions are made, as well as propositions offered that suit a diverse customer base. This is not a view that is always shared by shareholders but the leadership team believes this demonstrates why action on their part is so important.

### Equality and diversity in finance

Aviva sits at the heart of the financial services industry, a sector that has historically had a reputation for a non-diverse, non-inclusive workforce. So Aviva potentially faces an even greater challenge than some other organisations in shrugging off outdated stereotypes and removing obstacles to a diverse and inclusive culture – and tackling it starts with the boardroom.

Aviva is ahead of its industry peers, aiming for higher-than-standard diversity targets; it has a target of 40% of leaders to be female and 13% to be ethnically diverse, aligned with recent census statistics. Recognising the multiple problems that need tackling concurrently, Aviva has also set itself apart from other companies by publishing its ethnicity pay gap as well as their gender pay gap, with a disability pay gap to follow in the future. Collecting and publishing that information is part of its ED&I strategy; it publicly holds the organisation to account for making continual improvements, to hit its ambitious equality targets.

### A person-centred approach

Aviva encourages its employees to work with their line manager to create a “Workplace Adjustment Passport”, a document that can travel with them through their time at Aviva, and that details any short, medium or long-term adjustments needed to fulfil their potential at work. If they need flexibility in their work schedule to allow for caring for a relative, or long-term changes due to a health condition, it is agreed upon and detailed in the Passport. This allows employees to shape their work journey around their own circumstances and, importantly, not have to detail their needs and requirements repeatedly when line management changes.

### Creating communities

All Aviva employees are encouraged to join at least one of the “Aviva communities”, which have been created to support inclusion, to flag issues and lobby for change where it’s needed. There are six communities for employees to get involved with, in recognition of the fact that everyone has an identity of some kind and workplace needs are not restricted to protected characteristics. The communities are:

- Aviva Origins, focusing on ethnicity, religion and social mobility
- AvivAbility, focusing on supporting people with visible and invisible disabilities
- Aviva Balance, focusing on gender
- Aviva Pride, focusing on LGBT issues
- Aviva Generations, focusing on age-related issues
- Aviva Carers, focusing on all types of caring responsibilities

Each community is paired with two members of the executive team who work closely with the community’s co-chairs and members, giving all employees a voice and a role in shaping policies to better suit their colleagues’ diverse needs. In one instance, the Aviva Carers community lobbied for carers’ leave – the result was the introduction of 35 hours’ leave for all employees to meet any caring responsibilities that they might have.

### Engagement as a measure

Tracking membership of and engagement with these communities is one element of Aviva’s strategy around measuring the success of their EDI policies. In addition, they run annual employee engagement surveys, with additional pulses being run more often to keep EDI targets in sharp focus. Employees are also encouraged to share personal data through an HR-led campaign, ‘This Is Me,’ which in turn is used to drive action plans and set EDI targets.

### Moving the dial

As a result of their EDI strategies, Aviva has been accredited by Carers UK as a supportive employer, and in 2020 won Working Families’ Best For Fathers Award, recognising their achievements in achieving equality for parents. They have increased their female leadership to 33.7%, moving towards their target of 40%.



# TIME FOR GOVERNMENT TO CATCH UP

Policy-makers and regulators have traditionally seen equality, diversity and inclusion (EDI) as issues of legal justice. While we support this position, CMI argues that EDI is also a key instrument for unlocking the UK's productivity, which currently under-performs many of its peers. Sometimes, government has seen EDI policy as risky or burdensome regulation – “red tape”. Through our research we have come to see it very differently, as an opportunity to support greater productivity, well-being, and effective public services. There needs to be a Government strategy and action plan that reflects that reality.

We believe that a heartfelt commitment to The Everyone Economy by managers and leaders, underpinned by specific government actions, can:

1. Give more people in our society the opportunity to maximise their contribution.
2. Give private and public-sector organisations the tools to tackle their skills shortages and improve their performance.
3. Support the government's “levelling up” ambitions by enabling fuller participation within local communities.
4. Drive up the UK's post-Brexit productivity by stimulating creativity, dynamism and innovation.

As we've pointed out throughout this report, managers, leaders and organisations can achieve quite a lot of this by themselves, indeed they already are, but progress will be faster and more widespread with purposeful government leadership.

Political leadership and targeted policy interventions will help correct the *market failure* that's at the centre of this issue: an under-supply of effective and inclusive management practice that would otherwise help organisations, sectors and the economy achieve their potential.

## Setting the tone - and providing impetus

Government can also lead by example. It should be a trailblazing leader rather than lagging the best employers (as it increasingly does). We want to see the government establish the mechanisms to embed EDI in its economic and growth strategy, to require all businesses to reach a higher bar on the basis of this economic approach, and to raise the bar in its own administration, services and purchasing. Some of these mechanisms already exist. For example, equality impact assessments can be a useful tool for analysing the impact of public policy on EDI, but these are not always easy to find and the Government can be more transparent by clearly publishing these in one place such as the Equality Hub.

In our research, we've identified many businesses that are miles ahead of where government policy is. They absolutely don't see this agenda as a compliance issue or as a burden; in fact they see EDI as a source of innovation and competitive edge.

Government can and should shine a light on good (and bad) practice and use the persuasive power of policy and regulation to encourage and celebrate innovation. The best public policy has the ability to spread best practice – in this instance, around transparency, action planning and representation.





## EDI IN ACTION CASE STUDY: LLOYDS BANKING GROUP PLC

*Lloyds Banking Group plc is the largest UK retail and commercial financial services provider, with 26 million customers. Emily Csizmazia is the Head of Group Inclusion and Diversity, and has been at Lloyds Banking Group for 10 years. In her role, she co-leads a team of 25 colleagues across the Group's central Inclusion and Diversity function.*

### **Culture**

Lloyds Banking Group's approach to creating an inclusive company is to embed inclusion and diversity into everything the business does, and to create a culture of belonging where people can bring their true selves to work and feel their differences are valued.

They have chosen to focus on building up employee voice and to support this have set up employee networks and colleague panels to raise awareness of key diversity issues (such as disability, race, gender, and LGBT+). Senior leaders sponsor diversity commitments and ensure that they are making the right progress. For example, Lloyds Banking Group updated the options within their HR system to ensure they have the most inclusive ethnicity, sexual orientation and gender identity options available and are conducting a review of the colleague journey for Trans & Non-Binary colleagues following feedback from the LGBT+ Employee Network.

The company has also introduced inclusion training to improve employee understanding of the barriers to diversity and inclusion in the workplace, and to equip everyone to have honest conversations with their teams.

### **Data**

Data is incredibly important for Lloyds Banking Group, and they have a separate but integrated data team within Emily's Inclusion and Diversity team that focuses on gathering insight and analysing workforce data to ensure workplace policies reflect any barriers that have been identified. The data team uses multiple methods to gather insight on barriers in the workplace including staff surveys, feedback from employee networks, and monitoring recruitment, retention, and progression figures. Lloyds Banking Group publishes their Gender Pay Gap and Ethnicity Pay Gap through annual reports.

### **Recruitment and progression**

Through its data analysis, Lloyds Banking Group identified they needed to improve representation of Black heritage colleagues, particularly within senior management positions. To tackle this they took steps to increase the recruitment and progression of Black heritage colleagues by introducing diverse shortlists, a specific development programme for Black heritage employees in management positions, and a sponsorship programme for Ethnic Minority colleagues which resulted in colleagues progressing faster than those without a sponsor. By the end of 2021, these efforts had achieved a 50% increase in Black senior representation within just one year.

Lloyds Banking Group also found from the data that they needed to increase female representation - particularly in senior roles. They introduced a 'Women in Leadership' Programme for middle management women which resulted in around a fifth achieving a promotion within 12 months of attending and a third achieving a promotion within two years. Measures such as this have seen the proportion of senior management roles held by women increase from 28% in 2014 to 38% by the end of 2021. They aspire to increase this figure to 50% by 2025.

## HOW POLICY-MAKERS CAN HELP OTHERS REALISE THE POTENTIAL OF THE EVERYONE ECONOMY:

Fundamentally we want to see the UK government and devolved administrations outline – in a shared strategy, with clear objectives and success measures – how equality, diversity and inclusion is central to the future success of business and public services; and develop a cross-government plan to unlock this opportunity and potential. We were very encouraged to see this recognised in the recently published *Health and Social Care Review: leadership for a collaborative and inclusive future* following a review led by Sir Gordon Messenger.<sup>91</sup> Government can and should go much further across the board. This overarching approach should:

### 1. Move the EDI agenda to the heart of government policy, delivery and procurement.

#### • Commit to looking at EDI as an economic opportunity, not just a social good:

- Develop the evidence base around what inclusive practice can deliver for UK growth and opportunity.
- This responsibility should be owned by BEIS, with a dedicated minister to drive forward inclusive practice across businesses of all shapes and sizes.
- Ensure activity is coordinated across government by involving the Cabinet Office and chief people officer to champion and disseminate best practice approaches right across the Civil Service.
- Build EDI into all Government processes for delivery and appraisal of policies in more rigorous ways and beyond simple compliance with the Equalities Act. Incorporate these into all Departmental outcomes and metrics within Outcome Delivery Plans and/ or The Green Book.
- Regularly monitor and evaluate the impact of inclusive practice against key economic metrics.

#### • Make it a condition for the public sector and all organisations receiving public funds to commit to identifying disparities in their workforce and take action to close them. This could include:

- Requiring anyone in receipt of public funds to sign up to a charter for ethical business practice that details their commitments and responsibilities towards closing gaps in the workforce – for example, pay gap reporting,

action planning and making progress against these plans. Lack of adherence should be a barrier to receiving future grants, subsidies and contracts.

- Any purchase of capital equipment or contracts signed with third parties must request a copy of their EDI strategy/action plan and this must form part of the decision-making process.

- Creating – or sponsoring – projects that recognise the best-performing public and private-sector organisations that put EDI at the centre of what they do.

- Creating – or sponsoring – a project to discover the UK's most “everyone” communities in which people from all segments of society are able to flourish fully.

#### • Ensure levelling up focuses as much on people as on place:

- Increase and improve cross-cutting, transferable skills such as communication, problem solving and team working through a core skills bolt on to all government-funded skills provision, and alongside the focus on sector-specific skills such as digital, STEM or those related to the transition to net zero.
- Bolster line management capabilities – in the civil service and wider economy by utilising management apprenticeships and bitesize training.
- Require all Ministers, senior civil servants and regional decision makers to host - and report on - ‘uncomfortable conversations’ with those from under-represented groups in order to improve policy making and professional practice.

### 2. Reinforce powers and responsibilities of government agencies and regulators

- Resource the Equality Hub to conduct equal pay audits of small and medium-sized companies. These should be on a random basis with sufficient notice given to companies. Companies that perform poorly should be required to implement mandatory EDI training for managers and leaders. Access to financial support from local or central government should be contingent on staff completing this training, and being able to demonstrate how they are putting this into practice over a specific time period.

- Bolster enforcement action towards those employers that consistently fail to tackle discrimination in the workplace by **tasking the director of labour market enforcement with these powers and with a well-resourced team**. The EHRC should provide research and insights to the director on areas of high risk.
- **BEIS must provide better guidance and requirements on data collection and reporting** – too many businesses are unaware of what they can and can't collect. At a minimum, this should include representation and pay gap data, and ideally will also cover data on retention, disputes and disciplinarys, promotions and job satisfaction of under-represented groups.

### 3. Set clear national targets and data transparency requirements

- Gender pay gap reporting has been useful in improving transparency, but reporting is not enough on its own to drive progress. We would therefore like to see the government:
  - Simplify the reporting process by creating a single data collection process that covers gender, ethnicity and disability, and adds other protected characteristics over time.
    - Extend gender pay gap reporting to employers with 50 or more employees.
    - Introduce mandatory ethnicity pay gap (EPG) reporting for employers with 250+ employees.
    - Introduce disability workforce reporting for employers with 250+ employees and, over time, replace workforce reporting with disability pay gap reporting for large employers.
  - SMEs with more than 50 employees should be required to have an action plan and to demonstrate progress against this if asked.
  - Large companies should be required to publish action plans outlining how they will close pay and representation gaps and report on progress against these annually.
  - Plans should be proportionate to size and need. We do not want to be too prescriptive on the specific elements of action plans as this depends on the sector, type of organisation and its individual needs. But using data to set clear objectives, realistic goals, plans for meeting those goals and a way of measuring progress should form the basis of all action plans.<sup>92</sup>
- Critics of mandatory EPG cite challenges with data but these are not insurmountable. You can:
  - Use sliding scales for larger companies whereby they report more granular data.
  - Use minimum thresholds by different ethnic group.
  - Provide a narrative explaining the data.
  - Use the five headline ONS ethnic groups rather than the full classifications.
- **Establish a national EDI economic survey** – of similar size and scale to the Labour Force Survey (or as part of the LFS) – that builds on official statistics to capture wider data that we know limits progress in the workplace and allows measurement of organisational impact of EDI strategies.
- **Following this survey – develop a new time-bound UK action plan to tackle workplace disparities.** This action plan should be passed into law to commit future governments to implementing change.



#### 4. Spread and support best practice

- **Champion flexible working – including in SMEs and for those who cannot work from home - by making flex the default and reducing the list of reasons for rejecting flexible working requests.** We do not believe extending the right to request goes far enough because it still puts the onus on the employee to make the request rather than for the employer to offer it. The pandemic has shown that when they need to, it is possible for employers to adapt to flexible working. For this reason we think the list of reasons for rejecting flexible working should be reduced. In particular, we would like to see the following reasons removed:
  - “Flexible working will negatively affect quality”
  - “Flexible working will negatively affect performance”
- **Revamp and promote the mid-life MOT.** The mid-life MOT can support people to make positive decisions about their work, health, finances, and general next steps in life. We received numerous positive comments in our poll about the concept of a mid-life MOT but found very little awareness of the actual service. This is a missed opportunity. A new, more accessible online portal could help businesses and individuals to take advantage of the tools it provides.
- **Ensure enhanced shared parental pay is available to both parents as part of shared parental leave (SPL).** Currently mothers can’t transfer their entitlement to enhanced pay even if they haven’t used it. In the longer term, the government should replace SPL with individual, non-transferable paid leave to encourage take-up.
- **Ensure the ‘Inclusion at Work Panel’ goes beyond legal definitions of protected characteristics.** We welcome the announcement of the panel but for this to be effective it needs to address the cultural barriers to inclusion. We agree that there is a need to root out poor-quality training. To address this, the panel should work with professional bodies such as CMI. Our Professional Standard sets out best practice in management and leadership and underpins our products and services. This will be valuable as the panel develops and disseminates resources to employers. We can also support the roll-out of any resources through our large membership base.
- **Outline a framework on how to adopt best practice on socio-economic background (SEB) data, recruitment and progression.** The Civil Service guidance<sup>93</sup> on SEB data collection is a good starting point but we would like to see this form part of a wider framework for employers of all sizes that provides advice on what employers should be doing with this data and best practice. For example, the practices that restrict access into the workplace, and what works to boost retention and promotion.







## EDI IN ACTION CASE STUDY: TRANSPORT FOR LONDON

Transport for London (TfL) is a local government body responsible for most of the transport network in London. Donna McGuigan is the head of diversity and inclusion for the workforce at TfL and has been at the company for 5 years. Samuel Gower is the diversity and inclusion manager within Donna's team and has been at TfL for 2 years. The Diversity and Inclusion team looks after inclusion for TfL's 27,000 colleagues, and they deliver on the Public Sector Equality Duty, TfL's own Inclusion strategy, and the Mayor of London's EDI strategy.

### Culture

TfL's approach to creating a diverse and inclusive workforce is to create an open and safe environment where people feel they can bring their authentic self to work, every day.

The organisation has a range of staff network groups who play a key role in building an inclusive culture. Each group has a TfL executive committee sponsor to ensure that the issues raised are discussed at the highest levels of the organisation. The chairs and vice chairs of each group are able to dedicate 20% of their working time to these groups, and each group is given an annual budget. Managers and senior leaders regularly consult and engage with the groups, and they are seen throughout the organisation as invaluable hubs of knowledge and experience.

TfL also includes diversity and inclusion within its corporate induction for each new employee, and offers EDI training which is updated in line with the changing needs of the organisation. For example, the company recently introduced menopause training for all colleagues, whether experiencing the menopause themselves or supporting team members or colleagues who are. This universal approach helps to equip all colleagues to better support one another and create a menopause-friendly workplace. The organisation has also developed voice recognition software for email signatures to ensure that all colleagues can be sure their names are pronounced correctly and this also extends to pronouns. They have found that pronouncing a name correctly or addressing colleagues in line with their individual preferences helps to foster inclusion and a sense of belonging.

It hasn't been plain sailing. Barriers have included the perception that EDI is an HR issue and not necessarily a business issue; reluctance from some people across the organisation to become 'comfortable to be uncomfortable' around EDI because it's seen as an emotive and divisive subject; and a lack of resourcing to achieve all their desired objectives.

One way TfL has been able to raise awareness of EDI with senior leaders is through its Anti-Racism Leadership Charter, which was implemented in February 2021 and all of TfL's top 300 senior leaders were asked to sign the charter. It sets out the commitments that leaders will make to challenge and tackle racism in the workplace. The Charter has encouraged senior leaders and managers to hold open discussions to learn more about the lived experiences of colleagues, and has facilitated conversations across TfL about the organisation's commitments, progress and challenges with EDI.

### Data

This year, in addition to their ethnicity and gender pay gap data, TfL reported their disability pay gap for the first time. In addition to pay gap data, TfL also gathers whole company feedback through an 'annual viewpoint' survey. One result of feedback from the survey, was that TfL produced a trans and non-binary guidance to support colleagues and raise awareness of the barriers faced by LGBT+ employees.

### Recruitment

TfL identified recruitment as a key area to focus on, to help diversify the organisation - particularly in under-represented areas such as technology, which has traditionally been dominated by men. One method TfL uses is anonymised recruitment software (for Bands 1 - 4 and Operational equivalent roles) to remove bias from the recruitment process by presenting decision makers only with information that is relevant to determining job suitability such as skills, knowledge and experience. Diverse panels are encouraged during job interviews to ensure there is a diversity of opinion during the interview process, and TfL has worked in partnership with external organisations and grassroots groups to reach more candidates from under-represented groups.



### **Progression**

TfL acknowledges the need to diversify their senior leadership teams and they are currently working on a programme called 'getting ready for senior leadership.' This draws on the success the company has had with a sponsorship initiative called Our Time, run in partnership with City Hall which was effective at propelling women into senior positions within just a few months. TfL also analyses why strong and valued internal candidates sometimes miss out on Director-level roles in order to help design the right interventions to enable these people to progress. These have included diversity reviews held at each stage of the recruitment process to enable panel members to assess demographic diversity and diversity of thought and introducing leadership strengths, including an inclusive leadership measure and video interviews to give candidates the opportunity to apply their knowledge in real situations that are relevant to the role.

### **Apprentice and graduate routes**

Working with universities and utilising apprenticeships have been an important route for TfL to diversify its workforce. Apprentice hires for women have risen from 20% in 2018 to 33% in 2021 and graduates rose from 18% to 32%. Apprentices from Black, Asian and other minority ethnic backgrounds also increased from 35% to 38% over the same time period and graduates from 27% to 45%.

In just two years, TfL has achieved a 50/50 gender split in London Underground Signals and London Underground Fleet (Level 3) apprenticeships from a base of 0 women. This was achieved through a targeted attraction campaign, introducing a Route into Work employability programme and providing enhanced support through the application process.



# ANNEX

## A note on terminology

Our priority – following the guidance of our advisory council – is to use the simplest, most widely-understood terminology. We acknowledge where terms and definitions are contested. Ultimately, we want to focus our efforts on delivering change.

We recognise that current legal definitions are contested. For example, during the course of this research, we have received feedback that some prefer the term “disabled people” or “people with a disability”. We don’t want to be beholden to legal definitions alone because we believe – as

one of our advisory council members put it – that “the problem with the law is that it lags, it doesn’t lead”.

For the purposes of this research, we want to look at good practice that supports inclusion in the workplace. We have largely chosen to use terminology as found in applicable legislation and regulations, as this is the foundation that managers and leaders are obliged to approach workplace practice from – recognising that in most cases legislation represents the bare minimum of what we should expect from workplace leaders.





## Glossary of terms

- **Equality** means giving each individual or group of people the same resources or opportunities.
- **Diversity** is about recognising difference, appreciating the benefits of a range of views and acknowledging that your workforce should be representative of society.
- **Inclusion** ensures that your staff feel valued and that they can fulfil their potential regardless of their background.
- **Intersectionality** describes how race, socio-economic background, gender, disability and other individual characteristics interact with one another and overlap. For example, the challenges that a disabled woman would face will be different to a non-disabled woman or disabled man.
- **Equal Pay Act 1970** is legislation preventing discrimination in regards to the terms and conditions of employment between men and women. This now forms part of the **Equality Act 2010** that has a wider remit covering the protected characteristics.
- **CMI Professional Standard** sets out best practice in management and leadership and underpins all of CMI's products and services.
- **Advisory council** is an 18-strong council set up to steer and advise on the direction of CMI's 75th-anniversary project. It consists of some of the UK's most accomplished CEOs, entrepreneurs, peers, creatives, writers and broadcasters. A full list is available on page 60.
- **Imposter Syndrome** is a sense of being unqualified for a role you are adequately qualified for and in constant fear of 'being found out'.
- **Social mobility** refers to what someone's income and occupation is in comparison to their parents or peers.
- **Mentoring** is when a mentor (for example, a senior colleague) gives a mentee (for example a junior colleague) valuable career support and advice, builds self-esteem, and provides a sounding board.
- **Reverse mentoring** is about seeking the perspective of less experienced employees to give leaders a fresh perspective on issues such as strategy and culture.
- **Coaching** deals with particular tasks and focuses on developing specific skills.
- **Sponsorship** is the practice of championing and advocating to support an individual's career progression.
- **Reasonable adjustments** – refers to the legal requirement on employers to make adjustments to any elements of a job that place a disabled person at a substantial disadvantage compared to a non-disabled person.
- **Workplace adjustments** – refers to adjustments that employers can make to a job that will support any individual to carry out their role more effectively. This should be considered good practice.

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**Monica Chadha**

**Sherry Coutu CBE**

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**Ann Francke OBE**

**David Grayson CBE**

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**Adam Marshall CBE**

**Dr Alice Maynard CBE**

**Angela Noon**

**Teddy Nyahasha**

**Sir Trevor Phillips OBE**

**Lord Mark Price CVO (Chair)**

**Lord Kevin Shinkwin**

**Jackie Stevenson**

**Dame Julia Unwin DBE**

**Elizabeth Uviebinené**

**Avivah Wittenberg-Cox**







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The Chartered Management Institute (CMI) works with business and education to inspire people to unleash their potential and become skilled, confident and successful managers and leaders. With a wealth of practical qualifications, events and networking opportunities on offer throughout the UK and across the globe, CMI helps people boost their career prospects and connects them with other ambitious professionals in any industry and sector. In fact, CMI has more than 130,000 people training to be better managers right now. Backed by a unique Royal Charter, CMI is the only organisation allowed to award Chartered Manager status – the ultimate management accolade, and Chartered Management Consultant status which sets and maintains the highest standards for the management consulting profession.

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