



DIVERSITY PROJECT

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ACHIEVEMENTS TO DATE

- Almost 70 member firms spanning the asset owners, investment consultants, asset managers, industry bodies and search firms
- Intense programme of workstream events, as well as one annual event with 330 attendees
- Press campaign led by Lansons
- Inaugural DP Champion Awards
- 170 items added to the Website, including two new workstream webpages, one workstream page revamp, two new Chapter web pages
- 17 workstreams with multiple initiatives being launched with Partner organisations
- Industry campaigns #50for50 (LGBT Great), #NIW – National Inclusion Week and #BHM – Black History Month
- Scottish and Wealth Management chapters being formed
- DP/ Mercer survey
- DP 10 standards and scorecard updated
- Multiple guides developed and published, including Time to get serious: if diversity is a business imperative - treat it like one and Addressing Barriers to Diversity in Portfolio Management
- 350 social media posts on LinkedIn and Twitter, an average of 25k hits a month on Twitter
- 3 E-newsletters

RETURNERS

- Working on a cross company returners programme with Women Returners (April to Oct 2020)
- 84 people attended the Career Returners breakfast event: an Untapped Source of Talent event in June
- Produced a Returners video and video snippets post event
- Revamped the workstream website

LGBT+

- Role Model project 1000 – LGBT Great
- #50for50 campaign – LGBT Great
- Inaugural InterInvest event
- Matt Cameron presented at the DP Industry Wide event
- New workstream webpage launched

ETHNICITY

- Launch of the Black Voices study, #TAB and IA
- Mentoring circles launched and oversubscribed
- #TalkAboutBlack Opportunities in Investment Management event held at Mansion House with 130 students in attendance
- #BHM social media campaign in October
- New workstream webpage launched
- Working on an after-school programme in collaboration with the City of London Corporation (launch 2020)

SMART WORKING

- SMART working practical recommendations and SMART working let's get "smarter" with technology articles published
- 35 people attended the 'Let's get smarter with technology' breakfast meeting
- 120 people attended the 'Promoting Flexible Working in the Investment and Savings industry – partnership with Timewise' event.
- Webpage updated, with videos to follow

GENDER

- Over 100 attended the 'Why are there so few women in asset management' event
- Shared Parental Leave policy data finalised and shared across the DP
- 30% club mentoring scheme showcase event
- PwC/ DP report on the GPG
- Assertiveness and Positivity in the Workplace event planned for December

NEURODIVERSITY

- Quarterly NeuroInclusion Roundtables held throughout 2019
- Neurodiversity training event targeted at HR professionals
- Neurodiversity – Diverse Minds at Work event in December
- Workstream members participating in neurodiversity panel discussions
- New workstream webpage launched

DISABILITY AND MENTAL HEALTH

- Delivery of Suicide Prevention event
- Panel discussion event on Disability in the Workplace
- Collaboration with SCOPE agreed: half day seminar and toolkit to be delivered

EARLY CAREERS

- Early Career Attraction survey findings and recommendations uploaded to website
- upReach Springboard launched at event: 100 students paired with a mentor from the industry and work experience places secured
- Academy sessions to take place in December

MILITARY VETERANS

- Workstream created and objectives and success measures defined
- New team members recruited
- Working to confirm date, time and logistics for Diversity Project 'Why hiring Veterans make good business sense' event
- Armed Forces Covenant conversations with member firms to take place

WORKING FAMILIES

- Workstream created and objectives and success measures defined
- New team members recruited
- Focus on Shared Parental Leave to produce a best practice framework

ASSET OWNERS

- Two diversity sessions at the 2019 Annual Conference and speaker diversity form out in the field
- Diversity External Advisory Group reinstated
- PLSA member roundtable - trustee diversity consultation
- Company meetings with FTSE 100 firms discussing workforce/diversity issues
- 2019 AGM Review to include diversity focus
- Trustee diversity now part of PLSA official Work Programme
- Diversity reporting highlighted in refreshed 2019 Workforce Disclosure

HR

- HR Workstream Reps on 8 DP Workstreams
- New members added to the core team
- Neurodiversity training event targeted at HR professionals
- Shared Parental Leave policy data finalised and shared across the DP