



DIVERSITY PROJECT

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## ACHIEVEMENTS TO DATE

- Nearly 70 member firms including asset owners, investment managers, consulting firms and wealth managers
- Over 30 partners and supporters including industry bodies, search firms and D&I consultancies and social enterprises
- Intense programme of workstream events/ webinars, as well as flagship annual (virtual) event with over 900 registered. Ask me Anything sessions through lockdown proved particularly helpful for members
- 18 workstreams with multiple initiatives being launched with Partner organisations. Social mobility is the latest to be launched
- Industry campaigns #IAM for #TalkAboutBlack, Military Veterans and Smartworking
- 40 firms completed the ten standards self standards self-assessment
- Covid response webpage, resources, and webinars
- Press campaign led by Lansons
- Second DP Champion Awards
- Multiple reports, guides developed and published, including Build Back Better compendium, SMART working manifesto, The key role Line Managers play and #TAB calls to action
- 189 items added to the Website, including two new workstream webpages, one workstream page revamp, two new Chapter web pages
- 370 social media posts on LinkedIn and Twitter, at times getting 60k hits a month
- 4 Surveys
- 7 E-newsletters

### RETURNERS

- Launched first cross company returner programme – over 900 applications, originally 30 placements, but less due to Covid. All offered a permanent position at the end of the programme
- Second programme launched with 8 firms

### LGBT+

- 40 Responses to the Diversity Data Survey
- 503 Project 1000 Role Models
- 100 Global Top Executive Allies
- Ongoing work around benchmarking and networking

### ETHNICITY

- #IAM webinar – 1,800 attendees
- #BHM webinar with Partners, in October
- Launch of Catalyst Academy with City of London and CISI
- Launch of senior black professional mentoring programme with the Investment Association
- Ongoing development of mentoring circles for early to mid-career black investment professionals
- Calls to action and Allyship flyers

### SMART WORKING

- Collaborated with Timewise on a research project looking at attitudes to smart working
- Developed smart working manifesto
- Held 5 SMART working webinars
- Return to work survey findings with Qlearsite
- Webpage updated

### GENDER

- Relaunched gender workstream with a number of sub-groups focusing on the role of the line manager, career mapping, data, CEOs, industry messaging and mentoring/sponsorship
- Developed two targets: 30% of fund managers to be female by 2030 and the gender pay gap to be halved over the same time period
- Research conducted around line management and recommendations for organisations

### NEURODIVERSITY

- Held a neurodiversity Ask me Anything session
- Top 10 tips for neurodivergent colleagues during Covid

### MENTAL HEALTH

- Held Ask Me Anything sessions during lock down, including a GP and a Mental Health First Aid professional
- New webpage launched

### EARLY CAREERS

- Successfully ran Investment Springboard with UpReach; just under 100 students took part and had mentors from within the industry. Around half were subsequently offered an internship
- Launched second year of programme while maintaining links with first cohort of students
- Investigating barriers to socioeconomic diversity in entry level recruitment practices

### MILITARY VETERANS

- Called on member firms to sign up to Armed Forces Covenant
- Ran Ask Me Anything session on Resilience
- Workstream features on Government website
- Social media campaign

### WORKING FAMILIES

- Ran Ask Me Anything session during lockdown
- Initiated study of shared parental leave policies
- Looking to collaborate on research on impact of maternity leave on career progression

### DISABILITY

- Encouraging all member firms to become Disability Confident Employers
- Launching research initiative with Scope

### ASSET OWNERS

- Developed diversity guidance for trustee boards
- Included diversity and inclusion in all the PLSA events
- Sub-group of asset owners looking at how to ask better questions around diversity and inclusion of suppliers

### SOCIAL MOBILITY

- Looking to collaborate with City of London on their social mobility task force
- Supporting work of Social Mobility Commission on its employers' guide for Financial Services

### AMBASSADORS

- New ambassadors enrolled and conducted skills and capacity audit
- Ambassadors helping with social media, events, workstreams and content