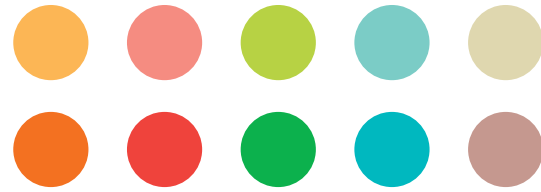
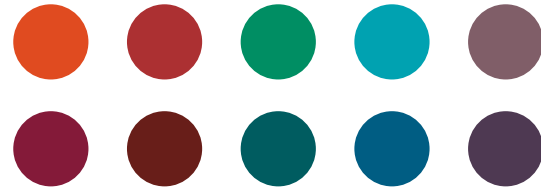


# DIVERSITY PROJECT GOALS & OBJECTIVES 2022

Creating an inclusive culture in the Investment and Savings profession.



DIVERSITY PROJECT



BUILDING INCLUSION IN  
INVESTMENTS & SAVINGS





# CONTENTS

Please click on the link you want to see...

[Diversity Project Manifesto](#)

[Goals & Objectives](#)

[Our Workstreams](#)

[Ambassadors](#)

[Asset Owners](#)

[Data & Metrics](#)

[Disability](#)

[Early Career](#)

[Gender Equality](#)

[LGBTQ+](#)

[Marketing & Press](#)

[Mental Health](#)

[Neurodiversity](#)

[Race and Ethnicity](#)

[Returners](#)

[Social Mobility](#)

[SMART Working](#)

[#TalkAboutBlack](#)

[Veterans](#)

[Working Families](#)





# DIVERSITY PROJECT MANIFESTO

The Diversity Project is a cross-company initiative championing a more inclusive culture within the Investment and Savings profession.

We believe that we have an extraordinary opportunity to press the re-set button in our industry: to recruit, nurture and retain the first truly diverse generation of Investment and Savings professionals.

That generation will themselves perpetuate diversity in our industry; we are looking to break one cycle and create another.

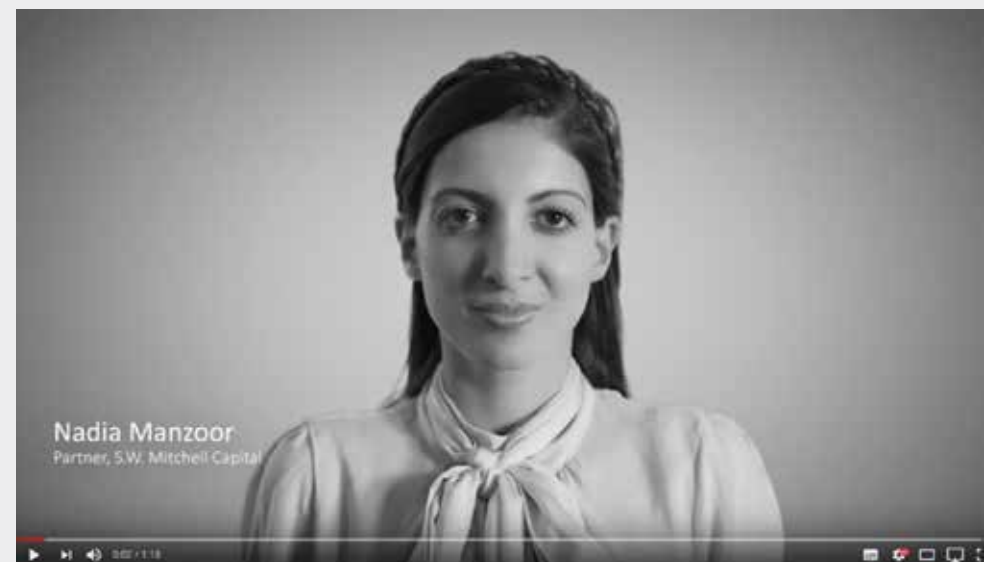
If we are successful:

- 1/ Our businesses will better reflect both society at large, and the individuals who trust us with their money.**
- 2/ Our people will create better financial outcomes to benefit our diverse savers and investors.**
- 3/ We will attract more interest in the industry, with a pipeline of diverse talent.**

Diversity is not only our social obligation, it's a business imperative.

Please join us, and help campaign on the diversity issues that matter most to you.

We have this in [video](#) format:







# DIVERSITY PROJECT GOALS & PRIORITIES 2022

The Diversity Project is a cross-company initiative championing a truly diverse and inclusive UK investment and savings industry with the right talent to deliver the best possible financial outcomes for our clients, to reflect the society we serve and ultimately build more sustainable businesses.

To do this, we have putting a sharper focus on results and more targeted interventions to address industry-specific challenges. The Diversity Project announced our new five year targets around three dimensions of diversity: ethnic minorities, gender and socio-economic backgrounds, focused on increasing representation and participation at all levels of seniority.

These are:

## Gender

---

- 20% female fund managers
  - Gender pay gaps reduced by one third from 2019 levels
  - Equality in graduate and school leaver recruitment
  - Equal take up of equity ISAs by gender
- 

## Ethnicity

---

- 90% ethnicity disclosure rate within 2 years
  - Ethnicity goals to be set after review of disclosure rates by gender
- 

## Socio-Economic

---

- Collection of socio-economic data
  - Support of one or more graduate/school leaver recruitment programmes focused on socioeconomic diversity
  - Adoption of specific and appropriate socioeconomic targets
-



# AMBASSADORS

Ambassadors are members involved in the Industry who share the aims and objectives of the Diversity Project, but are predominantly not affiliated with a Diversity Project member firm.



Sarah  
Bates



Jayne  
Styles



Caroline  
Bradshaw



Shehzad H.  
Abbasi

Ambassadors support the Diversity Project's goals and promote inclusion within the Savings and Investment Industry. They:

- **Role model inclusive behaviours of being humble, kind and actively listening.**
- **Identify and address barriers to inclusion and influence/nudge others to do the same.**
- **Collaborate across the Project and get involved in its activities.**
- **Host virtual/physical events, such as a virtual Skills Workshop.**
- **Amplify the Diversity Project's messaging.**
- **Promote a career in the Industry at schools/universities/business schools.**
- **Mentor people from underrepresented groups.**
- **Share what they have learnt about inclusion and diversity (I&D) initiatives that have/have not worked.**
- **Talk about the business case for I&D.**



# ASSET OWNERS

Asset owners such as pension schemes have a dual role when it comes to diversity and inclusion. As the end client, they can wield significant influence on the approach and attitude of their investment service providers, helping to draw good diversity practices up through the investment chain. There is also a need for the pensions industry itself to become more diverse, so it can better reflect and respond to the needs of diverse savers.



Craig Rimmer  
PLSA

The Asset Owners workstream has two distinct goals:

**1/ To encourage schemes to use their influence on their investment service providers through:**

- Challenging their asset managers, investment consultants and others to become more diverse and inclusive workplaces.
- Ensuring that schemes' views on the importance of board and workforce diversity is effectively communicated to investee companies and a key factor for consideration and engagement.

**2/ To encourage schemes to engage with the evolving diversity and inclusion discussion within the pensions industry. This includes:**

- Raising awareness of the importance of diverse and inclusive pensions workplace practices for decision-making.
- Providing guidance for schemes on diversity and inclusion best practice, through education and guidance.

Our priorities for 2022 are to:

- **Work with others to promote the first iteration of a Diversity and Inclusion checklist for Asset Owners.**
- **Continue to work with the Pensions Regulator as they look at increasing Equalities, Diversity and Inclusion within pensions.**
- **Carry out updated research into Diversity and Inclusion within trustee boards and pension schemes.**
- **Further promote and build on the Diversity Project's work within the pensions industry.**

- **Bring different parts of the pensions industry together through events and roundtables to discuss best practice on diversity, provide a forum for challenge and debate, and discuss how to respond to new regulatory developments.**

# DATA & METRICS

The Diversity Metrics workstream is made up of passionate professionals from all corners of the Investment and Savings Industry who work collaboratively.



**Jane Welsh**  
Diversity Project



**Matt Cameron**  
LGBT Great



We have three clear goals:

- To encourage all members to collect diversity and inclusion data in their own organisations.
- To collate, role model, and shine a light on best practices across the Industry.
- To enable the Diversity Project to report on its overall progress towards the 5-year goals.

Our 2022 objectives are:

- To develop and roll out the Diversity Project Goals and Progress Tool to assess track and monitor progress towards the achievement of the five year targets.
- To provide a current picture of where the Diversity Project is right now and recommend areas for future focus in 2023.



# DISABILITY

The purpose of the Disability Work stream is to accelerate progress towards an inclusive culture within the Industry around disability.



Alexandra Haggard  
Capital Group



Timothy Roberts  
HSBC Global Asset  
Management



Ashley Fagan  
Amundi

**An inclusive culture that supports and celebrates disabled employees will lead to happier and more productive employees, who will thrive within a proactively inclusive environment. It will lead to effective teamwork, wider perspectives, and better investment decisions.**

Whilst there is a larger dialogue around the suitability and inclusivity of the term "disability", we have decided to use it for this workstream in order to align ourselves with key stakeholders' decision to continue using the term when referring to people living with a physical or mental impairment that has a substantial and long-term negative effect on one's ability to work. This workstream of the Diversity Project strives to ensure that best practice to create a fully inclusive working environment is widely shared.

In 2022, our objectives are to:

**1/ Get a further 10 Companies to be Disability Confident by end of 2022.**

There are levels from entry level to being a leader and some of our 2021 companies will still be working towards their first accreditation, or we will be helping them go further up the levels (there are three). There are very few Financial Services companies who hold this Disability Confident kitemark. It is our goal through workshops and the BDF (Business Disability Forum) to ensure that all Diversity Project companies have achieved the Disability Confident accreditation (5-year goal).

**2/ To continue raising awareness and having conversations about disability and inclusive practices:**

We want to partner with SCOPE to deliver a series of workshops to help companies better prepare for disabled candidates applying for jobs and disabled employees.

These cover:

- Access to Work
- Interviews
- Policies & Procedures
- Reasonable Adjustments
- Recruitment Toolkits

We also want to improve Awareness by having more Social Media posts sharing stories and tips from our members and also awareness of workshops.

**3/ Introduce Disability Role Models who hold this Disability Confident kitemark:**

Our mission (in-flight) is to encourage and empower employees with disabilities and supportive allies to become visible across the Investment and Savings Industry by raising awareness to facilitate the attraction, development and retention of talent with disabilities into and with the Industry.

We would like to establish a baseline for firm/member engagement over the short term and improve diversity metrics to better inform equitable and inclusive employment practices and policies over the long term.





# EARLY CAREER

The workstream aims to improve young people's access to and awareness of career paths in the Investment and Savings Industry by actively engaging with partner organisations to bolster equitable access to employment opportunities.



**Ana Pongrac**  
Wellington Management



**Maddie Gill**  
Lane Clark & Peacock



**Richard Stephens**  
Goldman Sachs

Our work is centered around four key objectives, which inform our ongoing programmes and initiatives:

- **Career Awareness: Enabling students from disadvantaged socio-economic backgrounds to make informed career decisions by tapping into our network of Diversity Project Member Firms (industry volunteers).**
- **The ultimate goal is to demystify our industry and encourage students to explore a variety of career paths within the Investment and Savings Industry.**
- **Training and Mentoring: Partnering with charities which target students who would otherwise have limited access to personal and professional networks (e.g. state school students who are first in their family to attend university).**
- **Inclusive Recruitment & Retention of a Diverse Talent Pool: Liaising with HR departments and in-house Recruiters at Diversity Project Member Firms to source applicants from a non-traditional talent pool (which tends to be underrepresented in graduate recruitment).**



# GENDER EQUALITY

The goal of the gender equality workstream is to promote cultural and behavioural initiatives that help create an environment in which everyone is valued and can thrive.



**Helena Morrissey**  
Chair of the Diversity Project

We aim to achieve this by supporting both individuals and organisations.

Objectives and success measures:

- 30% female fund managers by 2030.
- 20% female fund manager by 2026.
- Halving of the 2019 Gender Pay Gaps by 2030.
- Reducing 2019 Gender Pay Gaps by a third by 2026.
- 50:50 male:female recruitment at graduate level.

Goals for 2022:

- Focus on female fund managers - launch our new programme **Pathway: Creating opportunities for female Portfolio Managers.**
- All member firms to publish gender pay gap data and to furnish the Diversity Project with other data around gender.
- Focus on Male Allyship.
- Continue to make progress on future of work and opportunities for work-life balance.
- New collaboration with GAIN to improve numbers of women entering industry.
- **Establish a Menopause workstream and produce a Pledge for Member firms to sign up to.**
- 40+ female intake on early careers.
- Continue to publish Gender Balance by Design case studies.
- Collaboration across other workstreams to improve line management, career progression, inclusive culture joint events.



# LGBTQ+

The LGBTQ+ Workstream is an umbrella group made up of LGBT Great, InterInvest and the Investment Association. Each organisation is operated and governed individually and works together in pursuit of three broad goals:



**Matt Cameron**  
LGBT Great



**Deon Pillay**  
InterInvest

- To develop LGBTQ+ awareness, visibility, and DE&I overall.
- To promote best practices to support the community and allies.
- To encourage all members to complete LGBTQ+ DE&I benchmarking.

Objectives and success measures:

- To increase LGBTQ+ visibility across members.
- To develop, identify and promote best practices to improve engagement.
- To get members achieving an LGBT Great Financial Services Standard.
- To identify and recruit Project 1000 visible role models in five years.
- To engage executive leadership, and other stakeholders, with purpose.

Key actions for 2022:

- To increase the number of visible LGBTQ+ role models and allies.
- To grow of our communities across members and other workstreams.
- To get all members participating in LGBTQ+ iiBT benchmarking.
- To increase engagement on LGBT Great and InterInvest events.
- To share best practices and encourage collaboration.



# MARKETING & PRESS

The aim of this workstream is to be the Diversity Project's strategic marketing and communications partner.



**Linda Rusheim**  
HT Financial Marketing



**Maddie Morgan Williams**  
Lansons

Our group of volunteers is made up of a small number of senior marketing, social media and PR professionals from across the Investment and Savings Industry.

Our aim is to help the Diversity Project achieve its 2022 aims and objectives by:

- **Raising awareness, gaining maximum exposure and coverage of Diversity Project initiatives and events in the industry and press. Ensuring we are amplifying Diversity Project messages - focusing on inclusion and all Diversity Project goals.**
- **Run high level campaigns round inclusion/ DP five goals and agreed themes.**
- **Ensure each workstream has a marketing representative on their team.**
- **Hand over the project management of the industry wide event in Q4 #Reset4Inclusion.**
- **Revamp the Diversity Project website - improve look and feel and navigation.**
- **Significantly increase our social media LinkedIn and Twitter Communities.**
- **Produce Diversity Project e-newsletters and increase following.**





# MENTAL HEALTH

The purpose of the mental health workstream is to accelerate progress towards an inclusive culture around mental health within the industry.



Jaya Arora-Shihn  
Aviva Investors



Ali Bernat  
Artemis

Each and every one of us has mental health - as we do physical health.

This workstream seeks to normalise discussions on mental health in the workplace, break down associated taboos, and strive for more focus on mental fitness and mental health wellbeing across the Investment and Savings Industry.

This will lead to happier and more productive employees, who will thrive within a proactively inclusive environment that is committed to mental fitness and mental wellbeing. It will lead to effective teamwork, wider perspectives, and better investment decisions.

In 2022, our objectives are to continue to break down the taboo surrounding mental health by:

- **Delivering quarterly educational sessions to increase awareness and understanding of mental health and how intersectional it is.**
- **Partnering with external organisations and our member firms to produce a toolkit on suitable provision for mental health and wellbeing.**
- **Implementing a programme of mental health ambassadors to advocate that mental health support should be available to all employees in the Investment and Savings Industry.**

Mental health is intersectional and so the key to making our objectives work is to collaborate with the all the Diversity Project workstreams.



# NEURODIVERSITY

Neurodiversity refers to the diversity of human brains and considers differences of how our brains are 'wired' as simply another natural variation in human.



**Rob Davies**  
Aviva Investors



**Jennifer Matthews**  
Tesco Pension Investment

**Neurodiversity can make a particularly important contribution to overall diversity of thought. Neurodivergent brains are wired differently, and hence by definition think differently.**

**From an organisational point of view, these differences in cognitive functioning can provide easy access to often sought-after skills: people with 'a different mindset', who 'look at things in a different way', who 'challenge established ways of thinking'.**

Our workstream's objective is improve NeuroInclusion within our firms and to increasingly attract neurodivergent talent into the Investment and Savings Industry. To achieve this, we educate on the topic of neurodiversity and explain how companies can achieve a valuable addition to overall diversity of thought through a neurodiverse workforce.

We expect that awareness and acceptance of neurodivergent conditions, such as autism, ADHD, dyslexia, dyspraxia and others, will also encourage existing neurodivergent employees to disclose their conditions, leading to less energy spent on 'covering up', which benefits both employee and employer.

Workstream Objectives:

- **Raising awareness of Neurodiversity.**
- **Supporting the business case for employing Neurodiverse individuals.**
- **Creating a safe space for Neurodiverse individuals to talk and share.**
- **Providing training for Diversity Project member firms.**

2022 Objectives:

- **Creation of a Best Practice Guide for data capture of Neurodiversity.**
- **Design and create an anonymous poll for DP membership firms staff around neurodiversity.**
- **Creating communications around dispelling the perception that neurodiversity is a disability but rather an ability.**
- **Continue Investment Week articles.**
- **Work on creating allies within member firms.**
- **Work across Diversity Project workstreams.**



# RACE AND ETHNICITY

The Race and Ethnicity workstream is committed to fostering an inclusive industry and workplace that cultivates an awareness and understanding of the value and competitive advantage that diverse talent brings to the industry and the clients and communities we serve.



Dimple Mistry  
GIC



Sachin Bhatia  
Invesco

**We are committed to working closely with the #TalkAboutBlack (TAB) workstream and focus on playing a leadership role in enhancing the professional development of those from racially and ethnically diverse backgrounds, with the aim of furthering hiring, retention and professional development and an inclusive experience.**

**We aim to support the member firms and industry's diversity and inclusion efforts by providing a cohesive voice to influence racial and ethnic representation across all levels of the business and enhance broader inclusion. All ethnicities should be able to be themselves at work and achieve their full potential and personal goals regardless of their colour and background.**

The Race and Ethnicity workstream reflects the inclusive nature of our group, we will collaborate with industry partners like Reboot and CFA who we will collaborate with on awareness raising. They will sit on our Steer-Co and along with TAB representation within our group. Our Mission Statement reflects our collaboration with TAB. The Race and Ethnicity workstream will address four main areas:

- **Awareness**  
Share experiences and raise awareness. It is important to flag that we all have a different experience, but it is just as valid.
- **Religion and Culture**  
This will include raising awareness of different religions and the impact of culture within the workplace.

- **Intersectionality**  
Across gender, class, religion and culture. There are overlaps with other workstreams that we will aim to explore.
- **Career progression**  
Recruit, retain and progress, with a focus on senior representation and progression.

Our goals for 2022 are to:

- **Create stronger partner relationships with Reboot, CFA and City Hive.**
- **Plan and execute on the 90% campaign.**
- **Complete the Fish out of Water campaign and explore running awareness sessions and roundtables to promote how organisations can bring the campaign into their organisations and what we have learnt from the campaign.**

- **Launch EmBRACE Your Career campaign and 100 Hours initiative.**
- **Launch a video series regarding different Religions to raise awareness (EmBRACE Religion).**
- **Ensure that there is Intersectional consideration in all all Diversity Project campaigns and initiatives and work closely with all workstreams.**
- **Partner with City Hive and take part in the cross company mentoring programme alongside #TalkAboutBlack.**
- **Work with Reboot to highlight the importance of Ethnicity Pay Gap reporting and use this to further promote the importance of the 90% Campaign.**
- **To work towards increasing the awareness of the workstream.**



# RETURNERS

We define returners as individuals who have taken a career break of at least 18 months. While career returners are not only women, hiring career returners should assist in reducing the industry's gender and diversity pay gap.



Rachel Harris  
Schroders



Anna Strillacci  
abrdn

The goals of the workstream are to:

- **Build the confidence of our member firms in taking their own returner initiatives.** Hiring career returners should ultimately become business as usual.
- **Promote career returners as including all genders, races and ethnicities.**
- **Promote the Investment and Savings Industry as a industry of choice to potential career returners.**
- **Boost confidence of potential returners to our industry.**

Our 2022 priorities are to:

- **Track and measure the success of our third cross-company returners programme and to launch a fourth programme either at the end of the year or part way through if demand should exist from employee firms.**
- **Offer follow-up training for those candidates who are unsuccessful in securing roles.**
- **Explore launching a mentoring programme for potential returners to our industry.**
- **Ensure website materials remain up-to-date and relevant.**
- **Continue to highlight to the industry the many different ways that returners can be brought (back) into our industry.**





# SOCIAL MOBILITY

Socio-economic diversity is lacking in the investment and savings industry, particularly in front office and senior roles. By helping Diversity Project member firms to tackle social mobility and address the benefits of less visible aspects of diversity, we aim to make the industry more inclusive and more considered when valuing and harnessing diverse talent.



David Aujla  
Invesco



James Whiteman  
Aviva Investors

**The intellectual argument for greater diversity in teams and companies has already been won. Quite simply, organisations need a broader set of perspectives in order to make better decisions. Nowhere is this more relevant than in the Investment and Savings Industry, where data and informational inputs are gobbled up at unfathomable speeds.**

Gaining an edge, an alternative source of information or an alternative perspective, is crucial. Yet our industry is overlooking a significant imbalance which is holding it back. A disproportionate number of front office and senior roles are occupied by those from similar wealthy backgrounds.

By failing to address socio-economic diversity and social mobility, our industry risks missing out on the valuable perspectives and potential of a vast section of the society it seeks to serve.

Our 5-year goals

- All member firms to collect socio-economic data for their people, both entry-level and existing, and to track promotions.
- All member firms to support one or more graduate/school leaver recruitment programmes focused on socio-economic diversity.
- At least 80% of interns, school leavers, and graduates to have attended state school for the duration of their secondary education (ages 11-16).

Our 2022 priorities

- Bring socio-economic diversity and social mobility to the centre of the diversity and inclusion discussion in the Investment and Savings Industry. Promote greater awareness and understanding of the issue and the potential benefits of properly addressing it.
- Provide practical advice and support for member firms to adopt and meaningfully work towards the social mobility workstream's 5-year goals. Ensure this support caters for the unique challenges faced by smaller firms.
- Ensure that both 'getting in' (entry-level access) and 'getting on' (progression) are key tenets of our work.

- Harness the intersectional nature of social mobility by collaborating with other Diversity Project workstreams on issues and topics that share commonality.
- Continue to strengthen our partnerships with other social mobility organisations both within the industry (e.g. City of London Taskforce) and more broadly.



# SMART WORKING

There are many forms of SMART working - it can describe a place of work, for example working from home, or a type of contract, such as part - time working, flexitime, job sharing and shift work.



**Rosanna Burcheri**  
Fidelity International



**Gareth Miller**  
Artemis

The SMART Working workstream seeks to promote all type of SMART working practices across the Savings and Investment Industry with the over-reaching objectives to encourage more inclusive cultures via talent pipelining, and to support industry returners and employee retention.

With many firms returning to the office once again in the coming months it is even more key to ensure our industry embraces the SMART Working Manifesto for Change which outlines explicit actions firms should take in order to adapt a more sustainable and strategic approach to flexible working.

The objectives of the SMART Working workstream for 2022 are as follows:

- Development of a flexible working toolkit to help support managers to manage an effective smart working team and to answer commonly asked questions.
- Demonstration of the successful implementation of the Smartworking Manifesto for Change with members firms and progress made on five calls to action across 2021 which will include case studies and experience driven discussions.
- Ensuring at least 70% of member firms have formally adopted Smartworking in order to adopt a more sustainable and strategic approach to flexible working and encourage more inclusive cultures.
- Exploring and building out partnerships with other Diversity Project workstreams in order to increase awareness and understanding and show the positive intersectionality of Smartworking.

**#SMARTWorking and #FlexibleWorking**



# #TALKABOUTBLACK

Our purpose is to build a pipeline of cross-industry Black leaders. We utilise a combination of mentoring, education, thought leadership and public speaking to increase the opportunities for Black people and professionals, and challenge the structures that inhibit progression.



Rachel Green  
Aviva Investors



Marina Ebrubah  
Man Group



Gavin Lewis  
Blackrock



Justin Onuekwusi  
Legal & General  
Investment Management



Anji Kang-Stewart  
Man Group

Our objectives for 2022 are:

- **The 90% campaign - An aspirational goal for the industry to achieve a 90% ethnicity disclosure rate within two years. Together with the Race and Ethnicity workstream we have launched this campaign and will promote it as part of our work to make discussions around race less of a taboo subject.**
- **We will continue to build resilience and scale of the key programmes we run: the Catalyst Education Programme, The Skills Workshop, EnCircle mentoring, C-Suite mentoring and taboo events. As part of this we are expanding our support infrastructure which includes seeking new volunteers to re-energise**

**and push forward initiatives and hiring a virtual assistant for programme delivery.**

- **We will be introducing KPIs and gathering impact data across all programmes to more formally measure and report on success.**

Targets for programmes in 2022:

- **The Catalyst Education Programme (CEP) - building scale to 100 students annually.**
- **The Skills Workshop - running annually for 15,000 + students.**
- **EnCircle mentoring - 30 new external attendees per session. Modernise strategy/mission and vision.**

- **C-Suite - developing an industry wide programme.**
- **Taboo - Ensure Taboo has a clear message to communicate about the success of current #TalkAboutBlack programmes. Through a more holistic approach to social media, creating a #TalkAboutBlack newsletter and by commissioning blogs to create positive narrative of progress.**
- **This year #TalkAboutBlack will focus on collaborating and sharing resources with our colleagues across the Diversity Project workstreams to maximise impact and address intersectional challenges.**

Within 3 years our campaign will see our industry agree quantitative targets to reduce the ethnicity pay gap and increase the number of Black leaders at the C-suite. We will continue to be at the forefront of thought leadership and breaking down barriers on these issues.



# VETERANS

The Veterans workstream functions as a conduit for the Savings and Investment Industry to attract, develop, support and retain highly-skilled ex-military personnel.



Kelly Mullane  
Northern Trust

**Our industry is not capitalising on the opportunity to hire talented and committed veterans. Our aim is to help employers recognise the valuable, highly transferable skills veterans possess and support veteran employees in understanding how they can thrive in the Investment and Savings Industry.**

Encouraging diversity of thought gives us the competitive advantage to enables us to better reflect society and our clients. The wider the pool of talent from which we can draw, the more our businesses will benefit.

Candidates who are highly organised, yet adaptable, disciplined and have the proven ability to lead teams in high pressure situations should be in great demand by Investment and

Savings employers but many veterans with these excellent credentials find looking for employment a challenging and sometimes demoralising experience. We need this to change - and the time for change is now.

Our 2022 objectives include:

- **Increasing awareness by helping firms understand why hiring veterans makes great business sense through events and forums.**
- **Engage with the Investment and Savings Industry employers to illustrate that diversity and inclusion is part of Defence culture and behaviours and a key component of a successful operating model.**

- **Encouraging organisations to show their active support for hiring veterans by signing the Armed Forces Covenant.**
- **Connecting with MOD families' federations to explain how the Diversity Project can support the partners of serving military personnel in finding employment.**
- **Working alongside the City Veterans Network, the Officers Association, the MOD Civic engagement teams and other organisations to share best practices and provide support for veteran hiring initiatives.**





# WORKING FAMILIES

Working families encompasses employees who have parental or carer responsibilities, and the scope of this workstream covers a broad range of issues pertinent to working carers, working mums, working dads and working parents.



Claire Black  
Seaforthland



Sascha Calisan  
Northern Trust

The focus of much effort in the area of working families has been in relation to working mothers and specifically the pre-leave, during leave and immediate return to work phase. This narrow definition of working families often misses the different family roles and situations that can impact an individual's ability to thrive at work.

The working families' subgroup is designed to raise awareness of the different needs of working mothers, fathers and those with other caring responsibilities, using events and activities to positively impact cultural change, enabling each of these groups to succeed in their careers.

Our priorities for 2022 are:

- **Work with member firms to support equal parental leave policies to provide a level playing field for all employees.**

Launch Diversity Project Working Families Best Practice Guide and encourage member firms to make a pledge to review the support they offer for working families, and to work towards the gold standard set out in this guide. Periodically track outcomes of those firms making the pledge.

Host a Working Families webinar to showcase the Best Practice Guide, to include senior role models and case studies to highlight what good looks like.

Continue social media campaign highlighting the positive experiences of fathers who have taken enhanced Parental Leave.

Repeat High Level Parental Leave Survey of member firms to track progress being made on enhancing parental leave policies and improvements on take up of Paternity leave.

- **Help firms to make a cultural shift on work life integration that accommodates working families' personal responsibilities, whilst continuing to be supportive of their career development.**

Share best practice examples of ways to support parents pre, during and post Maternity and Paternity Leave, at the senior management and line manager levels.

Advocate for the adoption of the Diversity Project's SMART working manifesto, where all employees, regardless of their caring responsibilities, are confident to ask for and to take family leave, and that flexible working is a right from day 1 within an organisation.

- **Highlight the need for member firms to incorporate a carers policy, given the continued trajectory that a vast number of employees will assume carer responsibilities during the course of their career.**

Provide member firms with a Best Practice Carers Policy template that encompasses every aspect of this under recognised responsibility, to include Carers Passport Scheme.

Incorporate more in-depth carer support guidance in an updated edition of the Working Families Best Practice Guide.

# JOIN THE MOVEMENT



DIVERSITY PROJECT




BUILDING INCLUSION IN  
INVESTMENTS & SAVINGS

 [info@diversityproject.com](mailto:info@diversityproject.com)

 [diversity-project-investment-industry](https://www.linkedin.com/company/diversity-project-investment-industry)

 [@diversityproj](https://twitter.com/diversityproj)

 [DiversityProjectInvestmentIndustry](https://www.facebook.com/DiversityProjectInvestmentIndustry)

 [Watch us on You Tube](#)