

DIVERSITY PROJECT GOALS & PRIORITIES 2024

Creating an inclusive culture in the Investment and Savings Industry.



DIVERSITY PROJECT



BUILDING INCLUSION IN
INVESTMENTS & SAVINGS



CONTENTS



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

Dimensions of Diversity, Equality and Inclusion

[Ambassadors](#)

[Mental Health](#)

[#TalkAboutBlack](#)

[Disability](#)

[Military Veterans](#)

[Working Families](#)

[Early Careers](#)

[Neurodiversity](#)

[50+](#)

[Gender Equality](#)

[Race & Ethnicity](#)

[LGBTQ+](#)

[SMART Working](#)

[Marketing & Press](#)

[Social Mobility](#)

DIVERSITY PROJECT MANIFESTO

The Diversity Project (DP) is a cross-company initiative championing a more inclusive culture within the Investment and Savings industry.



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.

Watch our DP intro video [here](#)





GOALS & PRIORITIES 2024

The DP 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. With over 110 members, just under £14trn in AUM and over 70,000 employees - our members, partners and ambassadors are all working together to move the Diversity, Equality and Inclusion (DEI) dial and make impactful change.

2024 themes

This year, our three key themes are: data, allyship and rewards of cognitive diversity with the goal of improving culture and behaviour. These themes help focus the work of the DP and create real impact over the long-term.

1/ Data

Collecting and leveraging data to drive informed decision-making, measure and promote transparency around progress.

2/ Allyship

Unlocking the support of many. Enabling cognitive diversity by seeking the views of people with different perspectives and experiences. Encouraging supporters.

3/ Rewards of Cognitive Diversity

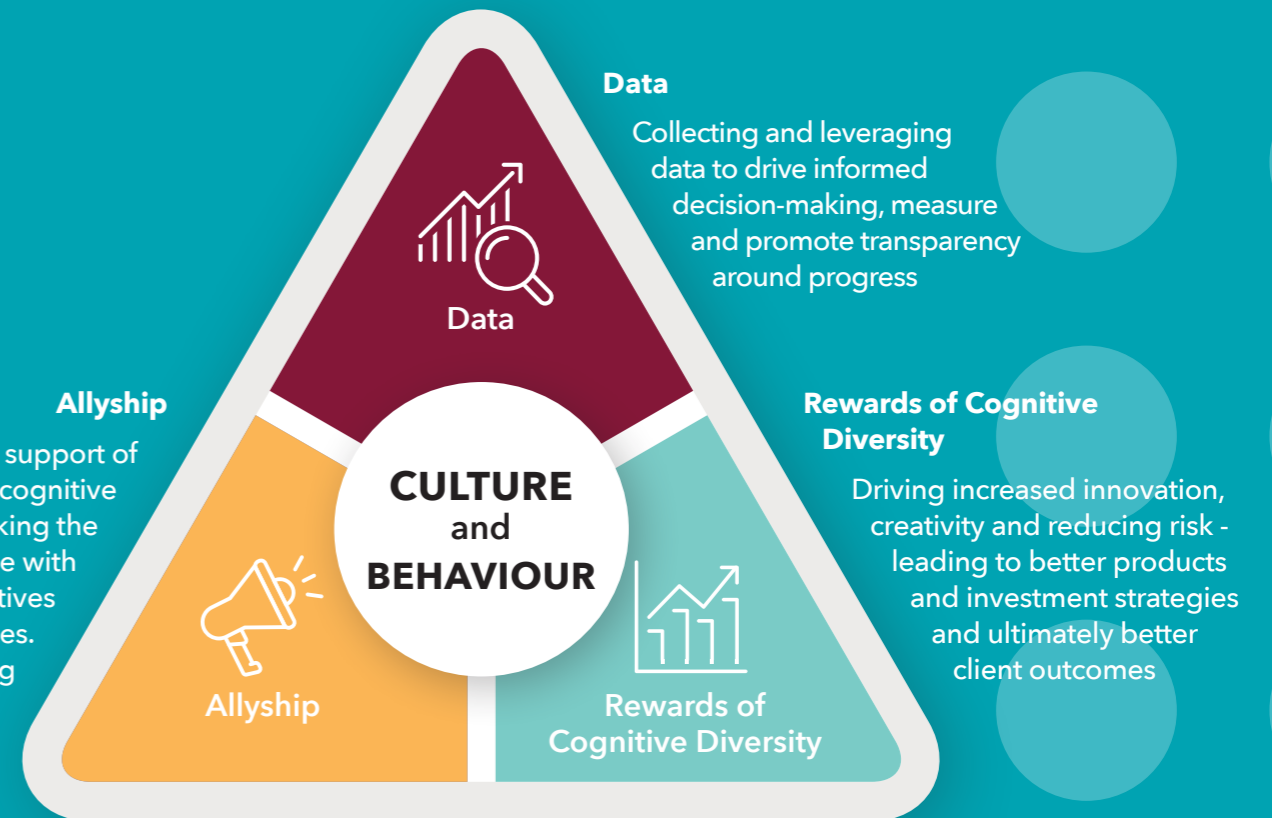
Driving increased innovation, creativity and reducing risk - leading to better products and investment strategies and ultimately better client outcomes.

An important cross-DP initiative this year is **“Change from Within.”** This initiative focuses on culture/ management practice and targets three different audiences:

- **Individual level:** Co-laboratory - highly action orientated sprints
- **Organisational level:** CEO communities of practice
- **Industry level:** build on our Goals and Progress Tool for an industry framework.

Five year goals

The DP announced five year targets in 2021 around three dimensions of diversity: ethnic minorities, gender and socio-economic backgrounds, focused on increasing representation and participation at all levels of seniority. Providing a sharper focus on results and more targeted interventions to address industry-specific challenges. Click [here](#) to see these goals.



AMBASSADORS

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



Caroline Keetch



Martina Jersakova



Sasha Molodtsov



Sarah Bates



Shehzad H. Abbasi



Our objectives for 2024 are:

- Use data collected on our Ambassadors, which include interests, availability, etc. to facilitate meaningful pathways for them to contribute to the DP's priorities
- Create and promote the Ambassador community as a platform for active allyship and networking opportunities - including leadership, resourcing and contributing towards DP Workstreams and central initiatives, programmes, events, etc
- Inspire Ambassadors to share their stories (promoting cognitive diversity) and lived experience with the broader DP community and Investment and Savings Industry, using their networks and resources to promote DEI in the wider financial services space
- Having reset the Ambassadors' group, we aim to provide active, energetic and capable support to the DP's activities

DISABILITY

Our goal is aligned with the DP to move the DEI dial by driving an inclusive culture that supports and celebrates disabled employees, who will thrive within a proactively inclusive environment and increase cognitive diversity.



Adam Deller
DWS Group



Ashley Fagan
Amundi



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

Our objectives for 2024 are:

1/ Continue encouraging member firms to sign up to disability practices and measure this effectively:

- Measured by the number of member firms who sign up to the Disability Confident (DC) employer scheme
- The DC scheme supports employers to make the most of the talents disabled people can bring to the workplace. It encourages employers to think differently about disability and take action to improve how they recruit, retain and develop disabled people
- There are three levels within the DC Journey: Committed (Level 1), Employer (Level 2) and Leader (Level 3). Our objective is to increase the number of member firms who

are Level 1 and support those who want to move to the next levels

2/ Support organisations by offering bespoke training to member firms around the topics related to disability:

- Increase engagement with the member firms to understand the support they need from the Disability workstream
- Partner with an external organisation to deliver workshop(s) or training to our member firms on topics such as recruitment of disabled candidates, policies and procedures, reasonable adjustments, etc

3/ Create a "support network" of individuals who can share experiences:

- Build an internal group, within the Investments and Savings Industry, of individuals who relate to disability topics, either because they

experience them personally, as well as carers or also as allies

- Offer a place or environment in which those individuals can feel confident in sharing their experiences, learn and provide support to each other

4/ Continue raising awareness and having conversations about disability and inclusive practices:

- More social media posts sharing stories and tips and also marking dates in the calendar which are relevant to the workstream

5/ Continue with disability role models and allies:

- Encourage and empower employees with disabilities to become visible across the Investments and Savings Industry by raising awareness to facilitate the attraction,

development and retention of talent with disabilities into and within our sector

6/ Increase engagement with the member firms to understand the support they require from the Disability workstream

EARLY CAREERS

The workstream aims to improve access to, and increase awareness of, career paths in the Investment and Savings Industry. This is achieved through actively engaging with partner organisations and member firms to continue to ensure equitable access to employment opportunities. We also look to support the retention of early careers talent in the industry, through understanding best practice in early career development and listening to the needs of those starting their career in the industry.



Sarah Miller
Redington



Ellen Clarke
Insight Investment



Early Careers has intersectionality with all areas of the DP, as such we are keen to involve a range of workstreams in our work; seeking viewpoints, recommendations and support for our activities

Our goal for 2024 are:

- **To attract, develop and retain early careers talent in the investment and savings industry**

Our priorities for 2024 are:

1/ Help to provide opportunities and career paths for those from underrepresented backgrounds, notable school leavers

- Partner with organisations running programmes to develop a DP pathway for early careers

2/ Promote and simplify information on early career programmes available to employers

- We continue to work on creating an employer handbook providing information on how to access government support available for apprenticeship schemes as well as sharing case studies from employers who have participated in early careers programmes. The employee handbook will also include FAQs and helpful tips and links

3/ Continue to work with upReach on student access into the Investment and Savings Industry

- As part of our continued work with the Social Mobility charity, upReach, we have already supported them in rolling out work

experience for multiple students across a number of member firms. We will continue to work with upReach to run industry events for students and prepare for the next cohort of work experience

4/ Hold asset managers to account on DEI in early careers

- Roll out further our Investment and Savings Industry level 1 pledge to member firms, consisting of low cost initiatives to promote diversity across early careers

5/ Help to create a central hub for early careers programmes and initiatives

- Create a live data centre with information on partner organisations for our member firms to access

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, whilst aligning to the DP's five-year gender goals and the 2024 themes.



Helena Morrissey
Chair of the DP



Our objectives for 2024 are:

1/ Successful 2024 Pathway Programme and Alumnae Programme:

- Measured by the number of participants and companies on the Programme, those who significantly advance in their careers and are promoted to either Portfolio Managers or positions closer to that of Portfolio Managers
- In addition, we continue striving to increase engagement and participation in the sessions and the Pathway platform, seeking feedback from participants, sponsors and companies in order to ensure continuous improvement
- We will assess ways in which we can grow our offering (potentially to other roles or geographies) that would benefit from a programme similar to the current Pathway Programme for female Portfolio Managers

- Hire a Pathway Programme Director and VA, to ensure we have the infrastructure to run an industry leading Programme
- Launch the 2025 Programme and 2024 Alumnae Programme
- 2/ Continue to run "Safe Space" and work on "Change from Within" initiatives to ensure gender related aspects are covered
- 3/ Ensure that gender related aspects are covered in the Allyship, Data and Rewards of Cognitive Diversity project wide work
- 4/ Raise awareness within the industry on the importance of hiring returners and ensure that firms and their HR systems don't penalise people who have career breaks or lack consistency in their track record. Continue promoting returners as furthering the DEI agenda across all types of diversity: hiring career returners should ultimately become business as usual

- 5/ Create a network or provide a platform where people in the industry who have taken career breaks, are able to connect; whilst we signpost and ensure they have access to roles in the industry
- 6/ Encourage take-up of enhanced paternity leave, as well as raise awareness of the growing number of employees with caring responsibilities
- 7/ Successful launch of the Parenting Horizons Speaker Series: Navigating support and understanding across the spectrum of parenthood
- 8/ Demystify menopause and raise awareness of symptoms by providing education and resources
- 9/ Continue collaboration with private medical insurers to encourage menopause care provision being included as standard
- 10/ Analyse the Gender Pay Gap (GPG) data and provide suggested targeted

interventions to decrease in member firms. Also increase the member firm sign up to the Menopause Pledge (50%)

- 11/ Together with our SMART Working workstream, collect and distribute data related to member firms return to the office policies
- 12/ Run a large scale in-person International Women's Day event in 2024

Our five year DP Gender goals:

- 1/ 20% female Portfolio Managers (up from 14% in large groups and 10% in small groups in 2019 source Citywire). Targets adopted by individual member firms. (Pathway)
- 2/ GPGs reduced by one third from their 2019 figures
- 3/ 50:50 male:female graduate and school leaver recruitment

LGBTQ+

The LGBTQ+ workstream, comprises LGBT Great and InterInvest. Each organisation is operated and governed individually and works collaboratively in pursuit of three broad goals for the DP.



Matt Cameron
LGBT Great



Deon Pillay
InterInvest



Awareness:

- Boost general awareness about the LGBTQ+ community and its diverse identities
- Persist in disseminating learnings and best practices to foster an inclusive environment
- Raise awareness specifically about LGBTQ+ women, spotlighting their unique experiences and challenges

Allyship and knowledge sharing:

- Back the DP's work on intersectional allyship, emphasising the interconnected nature of social categorisations such as race, class, and gender
- Leverage best practice improvements, promoting the adoption of successful strategies and approaches across the board
- Contribute towards highlighting the rewards of cognitive diversity

Diversity data and benchmarking:

- Encourage all members to complete benchmarking, providing a standard or point of reference against which things may be compared
- Illuminate LGBTQ+ diversity and inclusion data, underscoring the importance of representation and equality in all sectors
- Share value-add case studies of benchmarking, demonstrating the tangible benefits and improvements that can be achieved
- Foster a culture of continuous improvement, where benchmarking is not a one-time task but an ongoing process of learning and development

MARKETING & PRESS

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



Linda Rusheim
HT Financial Marketing



Maddie Morgan Williams
Lansons



Our aim is to help the DP achieve its 2024 aims and objectives by:

- Raising awareness, gaining maximum exposure and coverage of the DP, it's initiatives, educational programmes and events or webinars, via the press, other industry organisations, member firms, partner organisations, website, social media and other channels
- Improving brand recognition by creating and amplifying DP messages and it's value add
- Helping attract new members
- Running high level campaigns around the DP's five-year goals and 2024 themes
- Move the DP to a freemium content model, with more exclusive content for member firms only
- Running workstream initiatives where needed
- Encouraging existing members to support DP initiatives and drive the agenda within their own firms
- Agreeing KPIs, monitor and (re) evaluate marketing activity



MENTAL HEALTH

The purpose of the Mental Health workstream is to accelerate progress towards an inclusive culture around mental health-related issues within the industry.



Feyi Osinuga
Janus Henderson



Ali Bernat
AXA IM



Manish Solanki
Mercer

Our vision:

- **Our people are our biggest asset. To deliver for our clients we need to support our people throughout the full range of life experiences of their working careers**
- **All stakeholders within our industry will be aware of the relevance and importance of targeting positive mental health and creating the right culture in which to thrive**
- **Raise awareness of the importance of understanding and addressing mental health and wellbeing issues from the C-Suite down across our member firms, and ensure that talent is backed with appropriate resources and support**
- **Our talent will feel empowered to achieve their true potential even when delivering in a high performing culture**

Our objectives for 2024 are:

1/ **Host member events in collaboration with other DP workstreams with expertise around mental health, given its intersectional nature, examples include:**

- Support the Parenting Horizons Speaker Series: Navigating support and understanding across the spectrum of parenthood, with topics related to mental health
- Work with the SMART Working team to offer support to employees to mitigate burnout that can arise from new ways of working, when not receiving relevant support
- Continue addressing the importance of awareness around male mental health
- Deliver webinar(s) around the topic of domestic abuse, to support the employer, victims and anyone affected by this issue

- Host a roundtable to discuss and debate appropriate data metrics to enable firms in the identification of trends arising to support the mental wellbeing of their teams
- Explore offering a workshop to better understand the topic of addictions
- Organise an event with our TalkAboutBlack team with the intersectional lense of Black History Month and Mental Health Awareness Week
- **2/ Build allyship across the DP workstreams and ensure that member firms provide support to their employees:**
- Demonstrate that prioritising the wellbeing of its employees is necessary for creating inclusive cultures and recognising and protecting the cognitive diversity of teams

- Highlight the importance that senior level buy-in and endorsement is critical to creating an inclusive culture where people are open to share and seek support
- **3/ Continue building and updating our Mental Health Directory in order to share resources and suppliers that DP member firms use:**
- Each listing provides a summary of what each supplier provides
- Current categories include firms who offer: Strategy consulting, hosting conferences, guest speakers, employee awareness training, employee data analysis, benchmarking, specialist area training, research papers and first aider training

MILITARY VETERANS

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. The wider the pool of talent from which we can draw, the more our businesses will benefit in terms of cognitive diversity.



Kelly Mullane
Northern Trust



The Ministry of Defence (MOD) has estimated there are around 1.85 million UK armed forces veterans residing in Great Britain. Of that, around 900,000 are estimated to be of working age, but one in five people aged 18 to 34 most associate the phrase 'Veterans' with retirement.

Many financial organisations consider recruiting veterans, but just 39% would employ someone without industry-specific experience, which disadvantages veterans who have only known military service. 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, but many veterans with these excellent credentials find

looking for employment after their time in the Armed Forces a challenging, and sometimes, demoralising experience. We need this to change - and the time for change is now

Our 2024 objectives are:

- **Culture and behaviour:**
To support and promote the DP objectives so that financial industry organisations will better reflect society at large through recruitment of diverse talent
- To help DP member firms and the industry as a whole, to understand why hiring veterans and accessing the veteran talent pool makes great business sense through 'how to' articles, focussed events and discussion forums

- **Allyship:**
To encourage all member organisations to show their active support for hiring veterans by signing the Armed Forces Covenant (AFC). In 2024, we are working with the MOD to make the DP itself a signatory of the AFC. We hope this will inspire member firms to follow suit!
- **Working together:**
Alongside the City Veterans Network, the Forces Employment Charity, the MOD Civic Engagement Teams and other DP member organisations, we will share ideas, best practices and provide support for veteran hiring initiatives across the industry

NEURODIVERSITY

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



Tim Edmans
Pictet Asset
Management



Nalini Solanki
DP Ambassador



Our 2024 objectives are:

- **Raising awareness:**

Raise awareness of neurodiversity in the workplace through senior role models sharing their stories

- **Resource bank:**

Build a resource bank containing tools and signposting to support member firms with encouraging neuroinclusion in their organisations

- **Events:**

Two events to promote the business case for neuroinclusion, during Neurodiversity Celebration Week, one aimed at HR and DEI leaders, and one aimed at individuals. One event targeting

Exec level, with awareness raising and their role in driving neuroinclusion.

One event in collaboration with other workstream/s promoting intersectionality of neurodiversity

- **Intersectionality:**

Highlight intersectionality through collaboration with other workstreams: Menopause, Gender, Race & Ethnicity, Mental Health, Disability

- **Data collection:**

Include a neurodiversity specific question in the Goals & Progress Tool to understand what firms have in place for neurodiversity. Build on the 2023 Neurodiversity survey for the 2024 survey

RACE & ETHNICITY

The Race & 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, clients and communities we serve.



Kelly Tran
MFS IM



Saira Farooq
Barings



Our mission is to challenge the industry status quo so that people of different races, ethnicities and religions have the opportunities to fulfil their career potential and advance to senior positions in the industry.

Diversity is invaluable to the success of organisations within our industry, yet the lack of ethnic representation in senior positions is commonplace. Although a diverse representation of people join the industry, we see the majority progress only to mid-level positions. Our aim is to challenge the industry status quo and work towards addressing this inequality through raising awareness, developing skills and increasing allyship for ethnically diverse employees. Ultimately, we want to increase ethnic representation at senior levels within our industry. Notwithstanding ethnic, religious, racial or cultural backgrounds, everyone should feel they can bring their true selves to work and have the same

opportunities as others to succeed. To strengthen a collective voice, we endeavour to work with other industry partners who share our values and beliefs to further this mission.

The Race & Ethnicity workstream has adopted four key areas of focus:

- **Awareness**
Share experiences and raise awareness of themes occurring within the ethnically diverse community. It is important to highlight that individuals from different backgrounds have different experiences and bring an incredible breadth of cognitive diversity to our industry
- **Career progression**
Through the encouragement of transparency, promotion of understanding, motivation and inspiration, work to materially move the dial of ethnically diverse representation in senior levels within our industry

- **Intersectionality and allyship**
Explore overlaps and widespread challenges that have intersectional links outside of race and ethnicity alone. Collaborate with workstreams covering other diversity dimensions to ensure that race and ethnicity is considered within initiatives and campaigns
- **Data, measurement and accountability**
Promote industry-wide transparency of data so that there is clarity about ethnically diverse representation in our industry and continue to support working towards achieving 90% ethnicity disclosure

Our goals for 2024 are to:

- **Promote the #PowerHour initiative with the aim of creating a scalable operation to achieve more matches, increase allyship and create more opportunities for this newly created community**

- **Build an ethnically diverse community, and promote sharing of advice at senior levels leveraging our #PowerHour community**
- **Collaborate with other workstreams and external DP partners to encourage firms to improve data capture and disclosure rates regarding their ethnically diverse employee population, in particular considering the focus placed on data disclosure by the regulators**
- **Along with the DP, engage with external stakeholders such as regulators and industry bodies with the objective of moving the dial on ethnic representation at senior levels within our industry**
- **Leveraging our #PowerHour community to create more opportunities for those at senior levels and our allies to work more closely to move the dial on ethnic representation at senior levels within our industry (e.g., networking, coaching)**
- **Continue to partner with City Hive's cross company mentoring programme**

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.



Devvya Sharma
Invesco



Gareth Miller
Artemis Funds



Our 2024 objectives are:

1/ Data

Collect and distribute data relating to member firms returning to the office. We will add new related questions in the DP's annual Goals and Progress Tool, in order to better understand if there has been a shift in the hybrid trend. This will allow us to gather insights for future campaigns and initiatives

2/ Allyship:

Continue organising event(s) and initiatives, whilst collaborating with other workstreams, in order to use SMART working as an enabler for all aspects of diversity. We aim to ensure we look into these topics with an intersectional lens

3/ Rewards of Cognitive Diversity:

- Organise a "Recruiting for Success with Flex" social media campaign whereby we collaborate with partner firms, who promote job searching for SMART roles and those firms with SMART working practices. This will allow us to continue promoting flexible hiring practices which ensure that diversity is supported in our member firms and also promoted in the wider society
- Continue the rollout of the social media campaign #FlexBeyondHybrid to highlight different flexible working styles, which will include short profiles (both written and videos) on SMART working from both men and women in the Investment and Savings Industry

SOCIAL MOBILITY

Socio-economic diversity is lacking in the Investment and Savings Industry, particularly in front office and senior roles. By helping DP 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.



Rachel Allan
DP Ambassador



David Aujla
Invesco



James Whiteman
UBS AM



Our 2024 objectives are:

1/ DATA - Make meaningful progress in increasing the number of member firms collecting socio-economic data:

- Offer support to member firms in their data collection efforts via creation of a toolkit and other resources, which offer practical help to organisations seeking to improve socio-economic diversity in the workplace
- Organise a speaker series to discuss challenges, shared learnings, best practices and case studies which will inform member's journeys
- Deliver bespoke talks to member firms who are willing to engage on this topic,

visit them at their firms in order to galvanise the resources already created by the workstream

- Overall, we aim to increase the total number of member firms collecting and monitoring socio-economic data points, preferably those recommended by the Social Mobility Commission (to allow for comparison)

2/ REWARDS OF COGNITIVE DIVERSITY - Increase awareness of the benefits of increasing socio cognitive diversity to drive innovation, investment strategies and better outcomes

- Highlight how focusing on socio-economic diversity, social mobility, and other less visible diversity characteristics can positively impact cognitive diversity and benefit the firms' culture and results

- Support member firms at every stage of the employee life cycle (recruitment, development & progression and exit) to ensure an inclusive culture
- Ensure that socio-economic background and the benefits of socio-cognitive diversity is a theme running throughout the DP's work, by continuing to collaborate with other DP workstreams and central initiatives and projects

3/ ALLYSHIP - Increase awareness of the importance of allyship and intersectionality in our member organisations

- Encourage and empower employees from lower socio-economic backgrounds to become visible "role models" within their firms and the broader industry

- Promote the benefits of mentoring and allyship in addressing the industry's lack of diverse socio-economic diversity representation and progression
- Support member firms to better incorporate social mobility into their diversity groups and ERGs

#TALKABOUTBLACK

Our purpose is to build a pipeline of successful Black industry leaders. We use a combination of mentoring and reverse mentoring, education, thought leadership and public speaking to increase the opportunities and support for Black professionals. We also challenge the structures that inhibit progression.



Yvonne Yeboah
EnCircle Co-Lead



Justin Onuekwusi
Taboo Lead



Gavin Lewis
Catalyst Education
Programme Lead



Rachel Green
The Skills
Workshop Lead



Daniel May
EnCircle Co-Lead



Our 2024 objectives are:

- Data:**
We are very interested in understanding the impact that our programmes have in our industry, to individuals and also in the wider community

To this effect, we follow strict KPIs across all our five programmes (TABOO, Catalyst Education Programme, The Skills Workshop, EnCircle and the Black Leaders Programme). We are constantly monitoring and updating those throughout the year

We report annually via the TAB impact report on how each programme is delivering on its KPIs and set our next challenges accordingly
- Allyship:**
TAB has developed allyship materials for individuals and firms to foster support. We also hold an annual thought event during Black History Month which is open to all in the industry. <https://diversityproject.com/resource/talkaboutblack-allyship/>
With events and resources, in combination with the delivery of our five flagship programmes, we aim to foster allyship for the Black community in the Investments and Savings Industry
- Rewards of Cognitive Diversity:**
It is very important that the industry reflects the society we live in. By raising awareness, supporting in the recruitment, development and progression of Black professionals, we ensure that our industry benefits from the cognitive diversity that our community offers. In addition, each of our programmes are led by volunteers who demonstrate the positive effects of cognitive diversity

Our mentors provide a living example, which is continuously shared with mentees, as well as at events throughout the year

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.



Amit Singh
AXA IM



Claire Black
DP Ambassador



Charlotte Curley
Octopus Investments



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, non-birth parents 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 2024 objectives are:

- **Support for carers:**

We want to raise awareness of the growing number of employees with caring responsibilities, and changes to UK legislation that give employees rights to time off for these. We will explore what policies will enable them to successfully navigate caring responsibilities alongside their career and highlight the importance of flexible working policies to create the necessary work-life balance and aid their mental wellbeing. We will also equip line managers with the tools they need to put these policies in to practice and provide guidance on what practical support is available to carers

- **Encourage take-up of enhanced paternity leave:**

Our aim is to encourage fathers and non-birth parents to take more substantial periods of paternity/co-parent leave by showcasing the positive experiences of others. Through our Annual Parental Leave survey we will measure member firms progress against our goal that 90% of member firms will offer the gold standard of six months maternity and paternity leave at 90% pay by 2026. We are also aiming to support and educate employers as to why enhanced paternity leave is essential to gender equality

- **Parenting Horizons:**

This series takes our member firms on the journey to parenthood for those who

face a diverse range of challenges and provides insights on ways in which they can play a pivotal role in supporting employees during this deeply personal experience. Working Families will be sponsoring two sessions: Fertility and Childcare

- **Lightening talks:** Video shorts on topical matters related to working families
- **Childcare support:** We would like to explore the need to go further in supporting member firms to play a part in easing the increasing burden of childcare costs and availability, and possibly using its influence with government

50+

The purpose of the 50+ resource group is to provide resources and support for the DP workstreams where they interconnect with older workers.



Jayne Styles
DP Ambassador



Steve Butler
DP Ambassador



We enable the Investment and Savings Industry to have the right talent to deliver the best possible financial outcomes for our clients, to reflect the society we serve and ultimately to secure a more sustainable future for our sector.

- Over 38% of the population is over 50+
- 30% of the workforce will be over 50 by 2025

However, 93% of DP member companies have not invested time, money or resources into age-friendly initiatives. (Source: Diversity Project 2023 Goals and Progress Tool survey.)

To balance their workforce, member firms need to ask themselves:

- Does our company's demographic reflect the wider population?
- Do our older colleagues have access to training and development opportunities?
- Are they being promoted?
- Do we recruit older workers?
- Are older workers being 'let go' as they reach a certain age?

WHAT STEPS WILL YOU TAKE?





DIVERSITY PROJECT




BUILDING INCLUSION IN
INVESTMENTS & SAVINGS

 info@diversityproject.com

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

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 Watch us on You Tube