



DIVERSITY PROJECT



BUILDING INCLUSION IN  
INVESTMENTS & SAVINGS

# Introduction

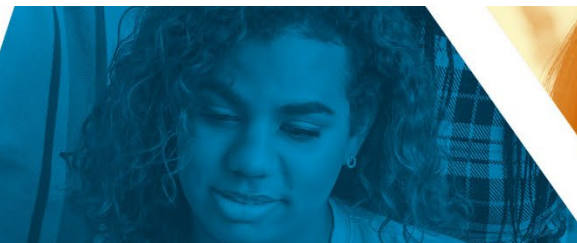
**Helena Morrissey**  
Chair

Hosted by



## Q: How high a priority is DEI at your company right now?

- High and increasing
- High but under pressure given other priorities
- Medium
- Low



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# 2024 results

...Sli.Do results...



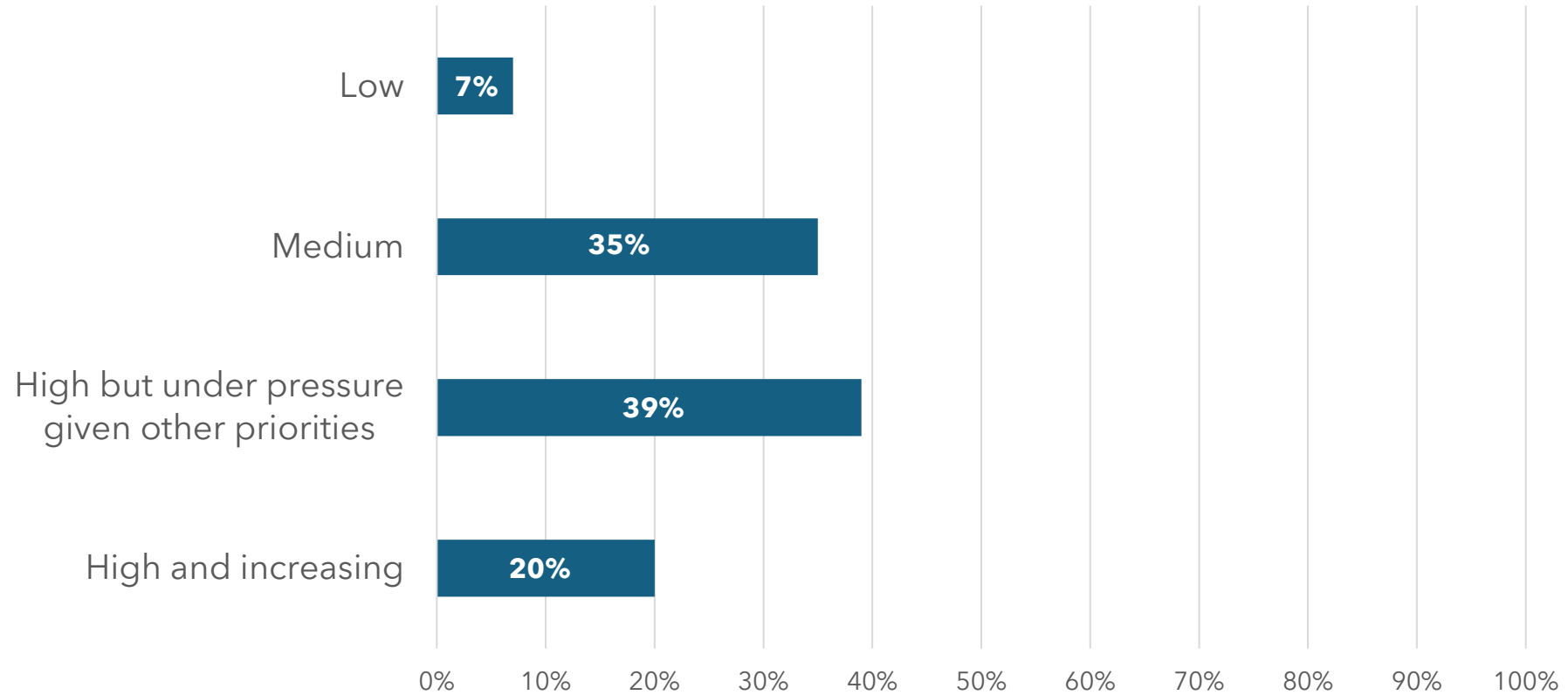
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# 2023 results



### How high a priority is DEI at your company right now?



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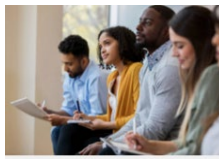
# Impact 2024

**MAKE THE CHANGE**  
Best Practice Guide and Pledge to support the Menopause for Member Firms and the wider industry  
www.diversityproject.com #MenopauseAtWorkplace #ImpactInclusion

**Heard in the Room**  
March 2024

**CHANGE FROM WITHIN**

Hosted by AVIVA  
**INTERNATIONAL WOMEN'S DAY**  
8th March 2024 | 2:00pm - 5:00pm



#TALKABOUTBLACK HISTORY MONTH 2023 JOIN THE DEBATE: Does being from a minority background influence hiring decisions and career progression more than merit?

**Handling the backlash against DEI**  
HELENA MORRESEY  
DIVERSITY PROJECT  
Good business decisions require taking different perspectives and experiences into account. That's the power of diverse thinking. But it's not always easy to do.

**ARMED FORCES COVENANT PLEDGE YOUR SUPPORT**

**P>THW>Y**

**DIVERSITY PROJECT**  
BUILDING INCLUSION IN INVESTMENTS & SAVINGS

**FLEX BEYOND HYBRID**  
THE FUTURE IS FLEXIBLE



**LEVELLING THE PLAYING FIELD**  
HOW TO BRING MORE DIVERSITY, ACCOUNTABILITY & OPPORTUNITY TO YOUR SOCIAL MOBILITY  
TODAY! SOCIAL MOBILITY

**UNDERSTANDING THE EXPERIENCE OF NEURODIVERGENT EMPLOYEES IN THE INVESTMENT AND SAVINGS INDUSTRY**  
NEURODIVERSITY EMPLOYEE SURVEY RESULTS 2023  
www.diversityproject.com/neurodiversity #WhatWorks #InclusionInNeurodiversity

**Demystifying Disability Confidence: Practical ways forward**

**Next Generation Talent**

**Leadership Accountability: Exclusive Senior Exec Forum**

**Workplace Menopause Unmuted**  
Tuesday, October 17  
Julius Bär

**POWERHOUR**  
IT'S TIME TO INVEST IN YOUR FUTURE

**GUIDE TO WORK RELATED SOCIAL EVENTS - A GUIDE FOR MANAGERS**  
THE DIVERSITY PROJECT

**Allyship**

**MENTAL HEALTH REPORT**

**From analyst to CEO: How women can build a career in fund management**  
To celebrate International Women's Day, Citywire and the Diversity Project team up to tell the stories of five female financial professionals.  
BY MARGALITA KARAGIOANNI  
Schroders

**SAFE SPACE**

**The Skills Workshop**

**Potential over polish**  
SPEAKER SERIES SOCIAL MOBILITY

**The Working Carer Supplement**

**SOCIAL MOBILITY SPEAKER SERIES**

**No Space for Racism**  
How to develop and deepen community within your organisation

**Together With Pride 2024**

**CITYWIRE**

**CITYA.M.**  
BUSINESS WITH PERSONALITY  
**SEXISM IN THE CITY**  
Starsted chief: Scrap the 'tourist tax' to keep London competitive

**UNDERSTANDING DOMESTIC ABUSE: Recognising the signs and how to help**  
7th February 2024

**INTERNATIONAL MEN'S DAY**  
1st November 2024 | 2:15pm - 5:00pm  
Hosted by AVIVA

**Mental Health Directory**

**REWARDS OF COGNITIVE DIVERSITY**



Hosted by **UBS**

# Impact and reach 2024



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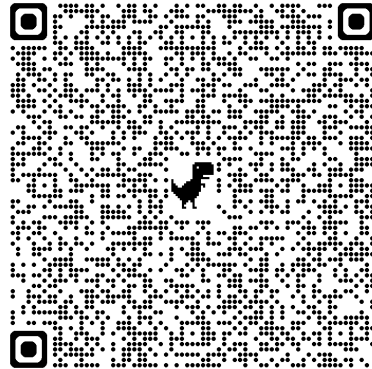




# Beyond Finance Awards



Scan the QR code to nominate



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# DP Annual Cadence

1. Launch Annual Goals & Progress Survey

2. Goals & Progress Survey results

4. Annual Event, includes Goals & Progress Survey results, progress, key areas to work on and update on taskforces

6. Strategy Day. Community and Programme Leads agree annual themes and new taskforces

8. DP Annual Roadmap published

9. Community leads in-person get-together

July                      October                      November                      December                      January                      February                      March                      June                      July

3. Goals & Progress Survey results shared with communities and exec sponsors

5. AC Q4 meeting to discuss ideas around themes/strategy/requests

7. Individual meetings with Community leads to discuss any gaps for specific community

10. Budget for next FY year kicks off (July), board approval (Sept)



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# Maximising Team Performance

