

Summary report: EDI approaches that go ‘beyond buzzwords’

**Embedding a systemic approach to EDI
across the UK’s professions**

Summary report

Alice Bell, March 2024

Introduction

Drawing on research with more than 7,000 members and learners of 12 professional membership and regulatory bodies across the UK, this report summarises findings about how recent efforts to promote equality, diversity and inclusion (EDI) have been experienced, across and between several professions. It serves as a call to professionals, and their representative bodies, to reflect on their outlook, conduct and collective actions.

This builds on an established agenda that highlights the central role professionals play in shaping the UK's economy, delivering success and opportunity across the workforce. A concerted effort to improve social mobility through the professions emerged around 15 years ago, with an action plan set out by the Panel on Fair Access to the Professions, chaired by the Rt Hon Alan Milburn. Recognising there is no single definition of 'the professions', the Panel's final report (2009: 14) characterised these careers as typically having:

- **recognisable entry points** – for example, standard qualification requirements
- **codes of ethics** – for example, that set out aspects of professional responsibility
- **systems for self-regulation** – for example, setting and regulating standards for professional development
- **a strong sense of vocation** and professional development.

The current drive to enact change through the professions is led by a collaborative group of professional membership and regulatory bodies. This Collaborative was formed in response to the economic challenges presented by the Covid pandemic, aiming to help people get back into work and progress in their professions by connecting learners, employers and education providers with opportunities to upskill and retrain.



The collaborative has since increased in number, representing evermore professionals and different types of professional and regulatory bodies:

ACCA (the Association of Chartered Certified Accountants), a globally recognised professional accountancy body providing qualifications and advancing standards in accountancy worldwide.

The Chartered Insurance Institute (CII) is a professional body dedicated to building public trust in the insurance and financial planning profession, with a commitment to driving confidence in the power of professional standards: competence, integrity and care for the customer.

CILEx Regulation (CRL) is the independent legal regulator for chartered legal executives, CILEX members, CILEX Practitioners and firms. They work with their regulated community to ensure that they deliver the best outcomes for clients.

The Chartered Institute of Personnel and Development (CIPD) is the professional body for HR and people development, championing better work and working lives for over 100 years.

The Chartered Institute of Public Finance and Accountancy (CIPFA) is a UK-based international accountancy membership and standard-setting body, the only such body globally dedicated to public financial management.

The Chartered Institute of Public Relations (CIPR) is the world's only Royal Chartered professional body for public relations practitioners with over 10,000 members. They advance and promote professionalism and standards in public relations by making its members accountable to their employers and the public through its code of conduct as well as through training, qualifications, and accreditation.

The Chartered Institute of Procurement & Supply (CIPS) is the global membership organisation for procurement and supply, driving positive change across the profession. They provide education and tools for members. And they are a voice and standard, building a network across the globe.

The Chartered Management Institute (CMI) is the Chartered professional body for management and leadership. Their mission is to improve the quality and the number of professionally qualified managers in order to create better led and managed organisations.

The Institute of Chartered Accountants of Scotland (ICAS) is a global professional membership organisation and business network for Chartered Accountants. They are also an educator, regulator, examiner and a professional awarding body.

The Institution of Engineering and Technology (IET) inspire, inform and influence the global engineering and technology community to engineer a better world.

The Institution of Occupational Safety and Health (IOSH) is the Chartered body for occupational safety and health professionals worldwide; a registered charity with international NGO status.

The Institute of Workplace and Facilities Management (IWFM) is the body for workplace and facilities professionals. They empower and enable members to expand their potential and have rewarding, impactful careers as business enablers who transform organisations and enhance experience.

While the 'Milburn report' narrowly focused on improving access to the professions, the scope of concern among the professions has now broadened to encompass the following principles (often abbreviated to 'EDI'):

Equality

Aiming to ensure fair access, treatment, and opportunity for all those in a profession or workplace, regardless of difference.

Diversity

Aiming to ensure that a wide range of identities, backgrounds, experiences, circumstances and perspectives are represented in the workforce.

Inclusion

Aiming to create environments where everyone's differences are respected and valued, enabling everyone to thrive and feel included.

This follows a well-established 'business case' which highlights how these socially desirable outcomes also make economic sense. For example, there is evidence to demonstrate that, with increased diversity:

Profits grow

Companies among the top-quartile for gender diversity on executive boards are 25% more likely to outperform the profitability of their peers in the lowest-quartile; and this figure rises to 36% between the most and least diverse companies in terms of ethnicity (McKinsey, 2020).

Innovation improves

Companies with above-average diversity (across six dimensions) in their management teams report innovation revenues which are 19% higher than those with below-average diversity among their management (BCG, 2018).

Productivity rises

Firms can achieve a productivity premium of +3% if managers are more gender diverse, or +7% if managers are more culturally diverse (Criscuolo et al, 2021).



Summary of research findings

The uncomfortable reality

Navigating professional life clearly comes with challenges for the vast majority of professionals. Almost three-quarters of professionals surveyed report experiencing:

- barriers to progression in their career (73%)
- discriminatory or exclusionary behaviour in the workplace since the start of 2019 (72%).

Nonetheless, across all metrics used to understand the experiences of professionals, a clear trend emerges in which negative experiences are more common among those with more 'marginalised characteristics'. This contradicts claims that professional experiences are rooted in a meritocracy. Rather, testimonies from professionals show how lived experiences marginalisation shape the everyday realities of working in the professions, in variable and complex ways.

The implications of this uncomfortable reality must be taken seriously as more than half (53%) of professionals surveyed say they have considered leaving their profession and/or organisation because of issues related to EDI. Most commonly, this is because they feel overlooked or undervalued, with further concerns around progression, management, workload, pay and culture.

While these findings will not necessarily be surprising to everyone, there is a clear perception gap between those that have marginalised identities and those that do not. This is a clear barrier to change – especially as senior leaders, with greater decision-making power, more commonly have fewer marginalised characteristics.



I've had some really awful experiences by senior [people in the profession] that will talk all day about EDI and inclusivity within the workplace and everything like that, but actually when it comes down to their day-to-day, they make you feel like an outsider and push you out.

Focus group participant (CIPD member)



George Floyd sparked more data, more things published, us talking about it. It was reactive, and now you can see it's dropping off because it was never fully understood, the real reason why we are supposed to be doing these things.

Expert interviewee

Professionals experiencing discriminatory or exclusionary behaviour in the workplace

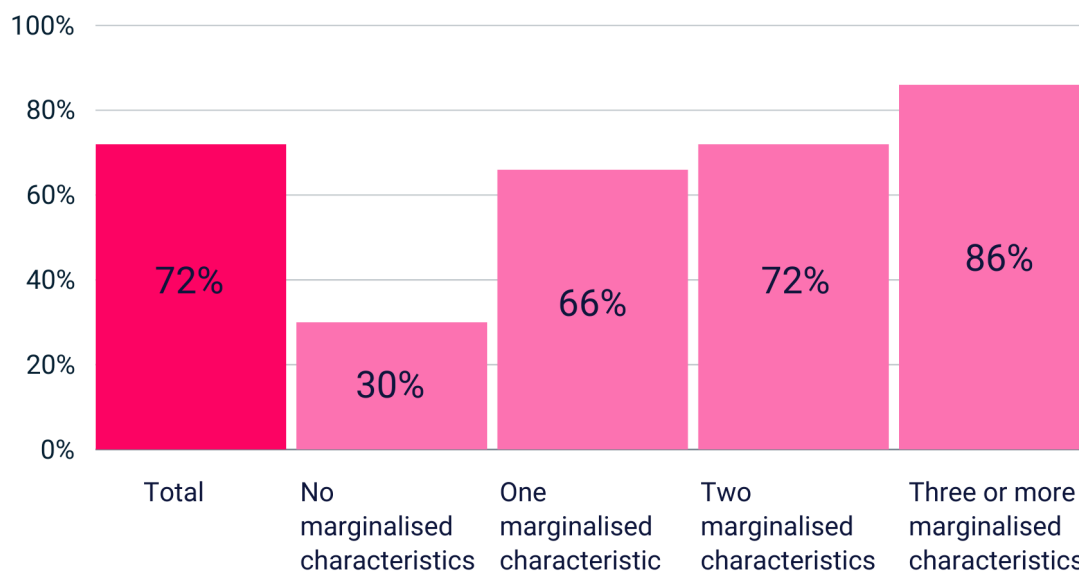


Figure 1: Proportion of professionals surveyed who have personally experienced any type of discriminatory behaviour in the workplace since the start of 2019, by number of 'marginalised characteristics'.

Belief in meritocracy, by number of marginalised characteristics

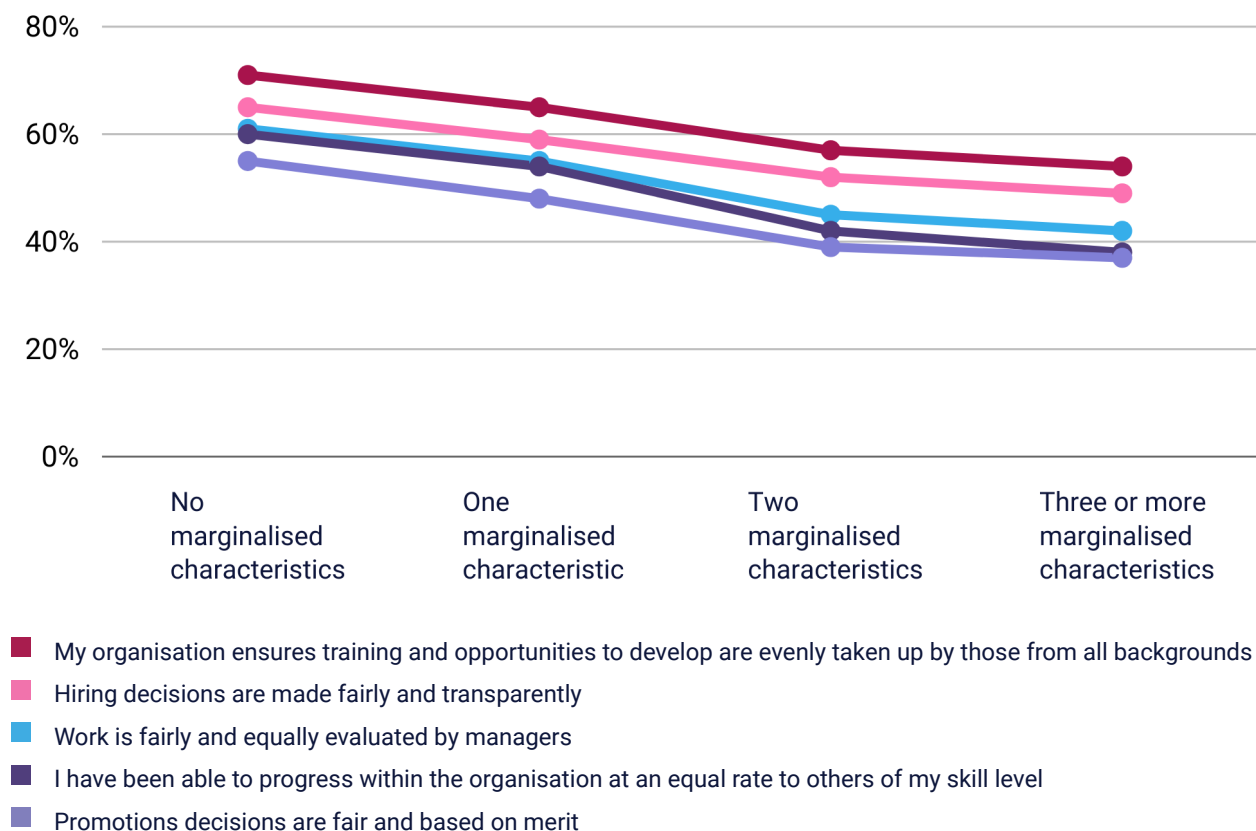


Figure 2: Proportion of professionals surveyed who agree with the above statements, by number of 'marginalised characteristics'.

Is progress stalling?

EDI is on the agenda. Over three-quarters (77%) of professionals surveyed report at least one type of EDI initiative or intervention in place at their organisation. However, professionals' views on the extent of progress are split.

While most are supportive of the principles of EDI, there is widespread scepticism about the capacity of EDI initiatives to deliver meaningful change. The overriding feeling is that progress seems to be stalling as there has been a failure to convert words into action.



It's very much the tick box exercise
... nothing actually ever happens.

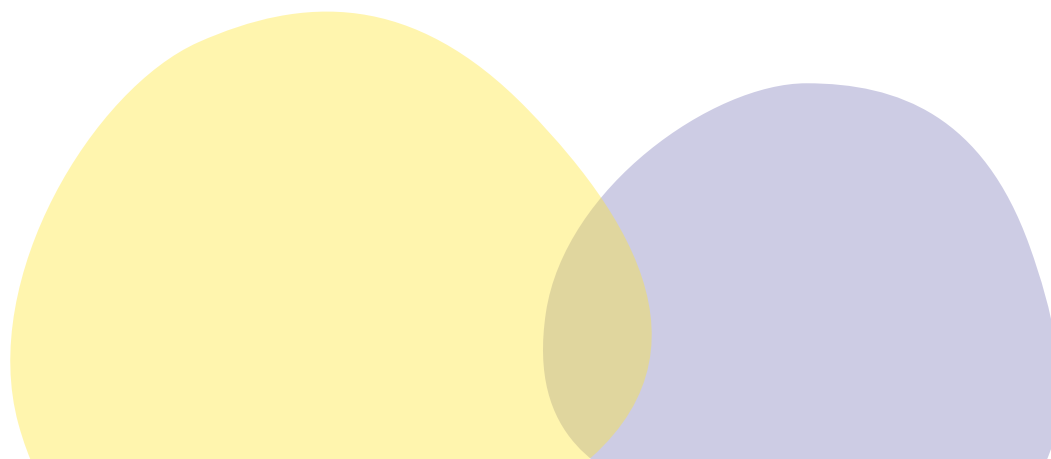
Focus group participant (CIPS member)

Because of these concerns, disillusionment is growing and support for action on EDI seems to be flagging. Around one-fifth (22%) of professionals surveyed believe EDI receives too much focus compared to other issues within their profession. At the extreme, there is a backlash against the EDI agenda from a few professionals who feel efforts have 'gone too far'.

What works?

No shortage of solutions have been tried in recent years.¹ Initiatives are generally viewed as effective, but the ways these are executed is vital. There is no 'one size fits all' solution, and 'what works' depends not only on the context (across professions, sectors, industries, and different types of organisation) – it also requires navigating several tensions:

- How best to demonstrate your commitment to change in the short-term, while enacting change that aims to have longer-term impacts?
- How best to involve those with lived experience of marginalisation in initiatives, without burdening them with the responsibility to drive change?
- How best to build coalitions and alliances across a range of groups, while appropriately recognising their differences?



Conclusions and recommendations

Reframing EDI

Ten years ago, government research on the 'business case' for EDI warned that 'gestures cost money: to achieve benefits and avoid costs, businesses need to see diversity as a strategic resource' (BIS, 2013: vi). The uncomfortable reality of continued experiences of exclusion, coupled with the widespread concerns raised about EDI efforts, suggest that the existing interventions regularly fail to heed this advice. It is clear that a different approach is needed in order to catalyse further progress, to enact the meaningful changes professionals want to see in their everyday lived experiences. Rather than focusing on isolated initiatives, this requires reframing how EDI is understood:

- Equality, diversity and inclusion must be guiding principles for all decision-making – not just for specific initiatives
- Interventions must focus on changing the systems that underpin marginalisation

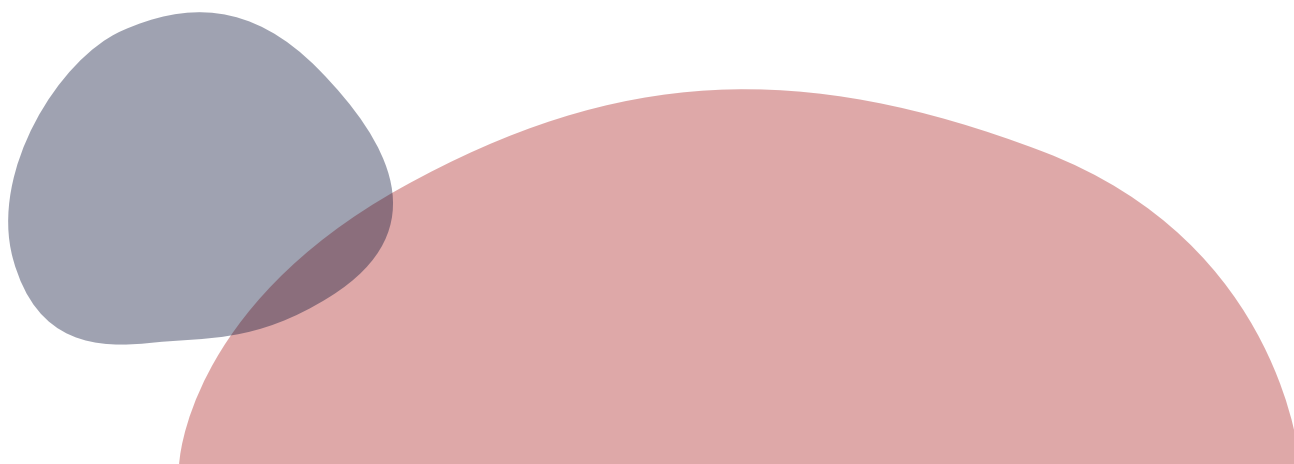
Fostering a 'race to the top'

Professional membership and regulatory bodies **set the standards** of what it means to be a professional

Employers **operationalise these standards** in hiring and promotion decisions, and across its policies and practices

Professionals **enact these standards** to foster more inclusive cultures

As stalling progress risks EDI efforts becoming a disingenuous 'race to the bottom', we suggest professional membership and regulatory bodies hold a key lever for positive action and lasting change. They have the capacity to 'raise the bar' for what it means to be a professional, in relation to the values of equality, diversity and inclusion. While there is no formal relationship between employers and professional bodies, this standard setting role can help to influence action and behaviours across organisations and among individual professionals.



Recommended action plan for professional membership and regulatory bodies:

1

Put EDI at the heart of what it means to be a professional by committing to:

- updating codes of ethics/ conduct, with corresponding reviews of professional standards, in order to embed the values and principles of equality, diversity and inclusion in the core meaning of what it means to be a professional
- critically reviewing communications around EDI to emphasise that efforts to improve professionals' experiences are non-negotiable, and integral to all decision-making.

2

Set higher standards for professionals by committing to:

- reviewing and continuously updating and developing all modules of training and CPD courses to ensure the values and principles of EDI are embedded across all learning and development opportunities
- ensuring qualifications and accreditation processes reflect updated professional standards, to ensure members are not granted with the highest levels of chartership or accreditation without core competencies around the values and principles of EDI.

3

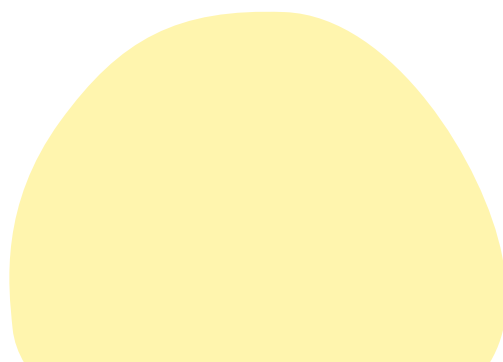
Actively involve professionals in change by providing meaningful opportunities for members, learners and employers to shape action around EDI in your profession – including:

- creating working groups for professionals to be involved in reviewing key actions, such as updates to codes of conduct and qualifications, and progression pathways
- ensuring accountability mechanisms in which professionals' feedback about activities and communications is acted upon.

4

Become role models for good practice by:

- ensuring all strategies, policies, procedures and practices are approached with an EDI lens
- continuously monitoring progress.



Moreover, working as a Collaborative provides a significant opportunity to drive change across the diverse industries and sectors that make up the UK economy. The bodies involved in the Collaborative represent an ecosystem of different professions who all co-exist in workplaces, and whose practices can influence the work and working culture of others. Beyond HR and management, each profession can influence EDI efforts through its activities – for example:

- How can accountancy practices influence the resources dedicated to EDI?
- How can workplace and facilities management practices ensure inclusive workplaces?
- How can procurement practices influence EDI in contractor organisations?

This requires finding meaningful ways for professions to work together to collaboratively effect change on EDI, without duplicating existing efforts.



Suggestions for the collaborative:

- 1** Benchmark progress against the recommendations of this and the Milburn report on a regular basis (eg, every three years).
- 2** Consider whether cross-profession development programmes can be offered (such as management skills) to assist those who are leaders to appreciate EDI issues and develop appropriate approaches.
- 3** Hold each other to account: commit to a bi-annual meeting across the collaborative to monitor key performance indicators on a regular basis to identify areas of progress and action and share best practice.

Our research findings go some way to highlighting how challenging it is to shift entrenched systems of inequality and marginalisation. This requires working across these systems, and not all issues highlighted in this research are within the influence and control of individual organisations and professional bodies. Everybody must play a role in enabling systemic change. The inconsistent patchwork of positive action, from some organisations and professionals, must be matched by commitments from all actors across the system, including (local and national) policymakers.

Recommendations for policymakers:

- 1** Develop systemic structures across education, welfare, health and housing provisions, which promote the fairer distribution of opportunity and support for all to enter, remain and thrive within the professions.
- 2** Ensure legal frameworks regarding equal opportunities, discrimination, harassment, and the statutory commitments of employers (eg, pay gap reporting), effectively protect the rights of workers with diverse characteristics.
- 3** Commit to participatory modes of policymaking that centre the lived experiences of those with marginalised characteristics in policy and service design.
- 4** Commit to working with the professions to review progress and promote action on EDI, as has been done previously by the Social Mobility Commission.

Recommendations for employers:

- 1** Ensure EDI guiding principles are included in all aspects of decision-making. Appoint an EDI champion at executive level, and link EDI to manager and leader development, performance appraisals, promotions and bonuses.
- 2** Ensure implementation of inclusive recruitment and promotion practices. This should include best practice consideration around role design and adverts, attracting diverse candidates, and salary transparency.
- 3** Encourage a 'speak up' culture to nip poor behaviours and practices in the bud. Ensure policies and procedures can respond and react to subtle as well as overt forms of discrimination and exclusion in the workplace.
- 4** Use data, such as staff surveys and exit interviews, to identify examples of discriminatory or exclusionary activities and implement lessons learned.
- 5** Clearly communicate inclusive initiatives/policies and appropriately involve staff in interventions.

Recommendations for individual professionals:

1

Challenge yourself to recognise how colleagues' experiences may be different to your own, and reflect on the personal biases you hold.

2

Actively work to minimise the impact of these biases on your decision-making and relationships with colleagues.

3

Contribute to positive change, working jointly with colleagues and making the most of learning and development opportunities.

4

Reflect on your personal progress and admit when you still have more to learn.

References

Boston Consulting Group (BCG) (2018). *How diverse leadership teams boost innovation*.

Available at: <https://www.bcg.com/publications/2018/how-diverse-leadership-teams-boost-innovation>

Criscuolo C., Gal P., Leidecker T. and Nicoletti G. (2021). The human side of productivity: Uncovering the role of skills and diversity for firm productivity, *OECD Productivity Working Papers*, 29.

Available at: https://www.oecd-ilibrary.org/economics/the-human-side-of-productivity_5f391ba9-en

Department for Business, Innovation and Skills (BIS) (2013). *The business case for equality and diversity: A review of the academic literature*.

Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/49638/the_business_case_for_equality_and_diversity.pdf

McKinsey and Company (2020). *Diversity wins: How inclusion matters*.

Available at: <https://www.mckinsey.com/featured-insights/diversity-and-inclusion/diversity-wins-how-inclusion-matters>

Panel on Fair Access to the Professions (2009). *Unleashing aspiration: The final report of the Panel on Fair Access to the Professions*.

Available at: <https://education-uk.org/documents/pdfs/2009-milburn-report-fair-access.pdf>

Please refer to the full report for a more comprehensive overview of the research findings, and further details on the background, approach and methodology.

This research was conducted by The Young Foundation on behalf of a collaborative of 12 professional membership and regulatory bodies.



The Young Foundation is a not-for-profit organisation driving community research and social innovation. We bring communities, organisations, and policymakers together, shaping a fairer future through collective action to improve people's lives.

Author: Alice Bell

With research contributions from Franca Roeschert, Victoria Boelman, Richard Harries, Yasmin White, Jem Hai, Philip Mullen, Chelsea McDonagh and Caroline Yang.





**The Young
Foundation**

The Young Foundation
Toynbee Hall
28 Commercial Street
London
E1 6LS

@the_young_fdn
+44 (0)20 8980 6263
hello@youngfoundation.org
youngfoundation.org