



Beyond Box-Ticking:

Driving Diversity and Inclusion (D&I) Efforts To
Deep-Rooted Organisational Change



Foreword

Equality, Diversity and Inclusion is a global challenge, but one that can be tackled with meaningful and relevant local solutions that support the needs of the friends, families and colleagues who make up our diverse region.

Understanding what those needs are, where barriers to inclusion exist and then facing into how we make meaningful change is something we are incredibly passionate about at Wesleyan. We have for some time, been trying to 'move the dial' in our own organisation, but as this report has found, we must all work together as a cohort, a region, and a nation to do this at scale.

That is why I was delighted, alongside colleagues past and present, as well as likeminded businesses from across the West Midlands Combined Authority, to play a role in championing the research and subsequent findings of Professor Kiran Trehan and her team. My thanks go to her and all of those who contributed to the research for their time, enthusiasm and passion to making a lasting difference in our businesses and communities.

Thank you to you, the reader for showing an interest in making a difference, I hope you too can make local commitments that have bigger benefits and take us a long way 'Beyond Box-Ticking'.

Mario Mazzocchi
Wesleyan Group CEO

Executive Summary

In the summer of 2020, the killing of George Floyd and the consequent Black Lives Matter (BLM) movement spurred action within corporations to assess and advance their diversity and inclusion (D&I) efforts. Following this, a group of professional services organisations in the West Midlands commissioned the Centre for Women's Enterprise, Leadership, Economy and Diversity (WE LEAD) at the University of York to undertake research to understand what they need to address to ensure under-represented groups in their workplaces were valued members of their organisations and had as much opportunity as anyone else to advance and grow. This research was important because there are some striking metrics of the West Midlands. This region is one of the most ethnically diverse areas in the UK, and in Europe. In addition, Birmingham is one of the youngest cities in Europe with under 25-year olds making up 40% of the population.¹ The diversity of the West Midlands is one of the region's biggest strengths.

This research builds on the recommendations of the West Midlands Combined Authority's Leadership Commission '[Leaders Like You](#)' report which highlighted that despite the growing interest by businesses who champion inclusive leadership,

fundamental gaps still exist in our ability to improve and increase leadership inclusivity. The Leadership Commission's report shows that leadership inclusivity is much more than simply increasing gender, ethnicity, or LGTB representation, [and] recruiting and retaining more people from traditionally under-represented identity groups. Addressing the equality and diversity gap requires a move from the current rhetoric to 'changing systems' from isolated or episodic initiatives to collective institutional action.

This research project was conducted via video-conferencing with organisations with a presence in Birmingham. The research team had access there to 5 leading professional services organisations, which allowed the team to conduct extensive interviews with twenty five diverse executives and employees at all levels. It should be noted that Birmingham has similar birth rates and migration patterns and shifting demographics to towns and cities across [Europe](#) and [North America](#). In all of these places, there is a pronounced desire among leadership to focus more acutely on D&I, driven both by ethical and business interests as well as internal and external pressure.

¹ See [West Midlands Combined Authority \(2018\) Leaders Like You](#)



The objective of the research was to assess how D&I efforts were manifesting within companies. This report synthesizes the findings. The conclusions and recommendations included in the report are based on a large volume of evidence that arose from in-depth interviews and focus groups. The qualitative evidence that was gathered gave rise to five key take-away points to focus on which are:

1. Pursue more granular data to enhance D&I outcomes.
2. Continue to prioritise D&I, beginning with recruitment imagery.
3. Reconsider relevance and use of academic requirements to enhance D&I efforts.
4. Continue to include networks and diverse employees in the process, but be mindful of tokenism and fatigue.
5. Share D&I strategy and progress with employees and stakeholders.

Each of the above points has associated action recommendations within this report to help senior executives within corporate professional services organisations lead current and new D&I initiatives which result in meaningful and lasting change.

Overall, the research showed that executives and personnel across organisations felt a strong desire to do something to better address D&I shortfalls and were taking action in this regard. As one interviewee described:

"I think there are conversations happening, but I think it is probably happening on a fragmented basis. There is probably a lot of power to go into this in a more centralised way, understand the trend and then put together the plan to really combat that."

Essentially: the building blocks of a successful D&I strategy were present at most of the organisations that participated in the research. However, the research indicates that these foundations alone are not delivering the tangible gains both their employees and leadership desire. This report identifies the important building blocks that companies in pursuit of a strong D&I strategy should have in place, and the key actions that the research indicates will lead to measurable progress.



The research showed that currently:

- Businesses want to be more diverse and inclusive and have recently ramped up efforts in this regard, particularly in response to the killing of George Floyd and the Black Lives Matter (BLM) movement.
- Even businesses with the most robust D&I programs and resources struggle to address homogeneity at senior levels.
- D&I matters deeply to members of the younger generation.
- Degrees and other education criteria limit D&I potential.
- Employees, prospective employees and stakeholders are keenly aware of a company's diversity profile – there is no way to paper over a D&I problem.
- Yet necessary data on D&I is lacking.
- Efforts to include diverse employees in D&I initiatives – but not other initiatives – are common, smack of tokenism and foster resentment.
- Employees often perceive superficial D&I efforts as “box-ticking.”
- Diverse employees want to be meaningfully engaged in D&I efforts, and they want to see change, especially in diversity at higher levels.
- Some white employees may chafe at changes.
- Representation and retention deeply matter.
- Businesses wield incredible power to shift dynamics within their organisations and in the communities in which they operate.

Methodology

From March to June 2021, a team of researchers from WE LEAD at the University of York conducted a series of in-depth interviews and 4 focus groups (with between 3 and 5 participants) with a total of 25 people at 5 professional service organisations and 2 regional business support organisations in Birmingham. The interviewees ranged from entry-level professionals to Director-level and included employees and executives from a range of diverse

and under-represented backgrounds. Interviews and focus groups took place via video conferencing and all interviewees were assured that their names would remain confidential to ensure their responses were as frank and forthright as possible. The research yielded extensive audio recordings which gave over 65 pages of transcription data to analyse, in addition to company policies, reports and documentation.





Among the take-away points, five stood out for their repeated mention during the hours of interviews.

These 5 key take-away points will help organisational change agents ensure that their commitments, anti-bias trainings, recruitment reforms, mentorship programs and other D&I initiatives actually result in meaningful and lasting change.

1.

PURSUE MORE GRANULAR DATA TO ENHANCE D&I OUTCOMES

As with any initiative, the more data there is available to work with the better. Leaders interviewed as part of the research said they did not have sufficient data on representation of people from diverse backgrounds within their companies and talent pools, even those with robust D&I initiatives. This was especially true regarding data that captures employee intersectionality – overlapping aspects of a person's identity including gender, sexual orientation, disability, race and ethnicity. Without this granularity of data, injustices can perpetuate under the guise of progress. For example, as one interviewee pointed out, data that focuses only on gender and not on other aspects of identity could lead a company to categorise a Board comprised mainly of women as a success story – even if all of those women were white and public-school educated.

Quotes

"A leader within a business may get some data on gender and some on ethnicity but they are not sure what it means. We will be building better dashboards so we can get real-time data. But without that we can't direct resources specifically."

"I would want to talk about types of support, what we are doing around D&I, how we create safe spaces, but the organisation really needs to think about what that means and might be distracted by data they don't have."

Action Items

- Depending on resources, **dedicate either a person, team or third party to tracking diversity** in the company at all levels.
- Have that designated resource **use the data to establish measurable goals** and pathways to achieve them.





2.

CONTINUE TO PRIORITIZE D&I, BEGINNING WITH RECRUITMENT IMAGERY

Employees that were interviewed, especially those from under-represented backgrounds, expressed great awareness about their organisations' diversity and inclusion progress and shortfalls. Some expressed encouragement at concrete steps their organisations had taken to make minority employees and recruits feel like there was a place – and future – for them within. On the other hand, many minorities – even at organisations with robust D&I initiatives and diversity at junior levels – said they immediately noticed that people from their backgrounds were not well represented throughout the company. Some said they first detected this even before joining their organisation, in interviews, internet searches and imagery that suggested the company was “not for us.” Others said they were well aware that diversity visibly fell off at a certain seniority level.

Quotes

“When I started in November, one of the first things I did when I got the job offer was to have a look on LinkedIn and I didn't see many people that looked like me.”

“When I went for the interview, there were Muslims, Asians and Blacks on the panel and I thought, ‘I want to work for this organisation.’”

Action Items

- **Work urgently to meaningfully address D&I shortfalls** in the company by prioritising new recruitment and developing diverse staff, rather than simply moving one successful person of an under-represented background from role to role. Ensure that diverse employees at all levels are engaged in decision-making and fully embraced as valued members of the organisation. This can be encouraged by **linking D&I goals to organisation-wide performance reviews**, so people understand that everyone is responsible for addressing shortfalls. This work takes time. In the meantime:
- **Look critically at the imagery the organisation puts out into the world:** the website, social channels, recruitment assets, presentations, pamphlets and other materials. Consider what message these materials may convey to diverse candidates or employees and make necessary changes. Likewise, **think critically about the diversity of the recruiters, interview panels** and generally about the face the organisation presents to the world. If it's homogeneous, make changes, but be sure to also:
- **Acknowledge that ongoing D&I efforts are first steps** and that the company is working urgently to do more.

3.

RECONSIDER RELEVANCE AND USE OF ACADEMIC REQUIREMENTS TO ENHANCE D&I EFFORTS

Colleges and universities have a diversity and inclusion problem that becomes a corporate problem when businesses tether themselves exclusively to those pipelines of privileged talent. Education matters and certain knowledge and skills developed in institutions of higher education are fundamental to many industries and positions but there are a number of creative ways innovative companies truly dedicated to D&I can untether themselves from these pipelines. They will all come at a financial cost, which may be a price worth paying compared to the price homogeneous companies will ultimately pay in missed opportunity.

Quotes

"[Managers] revert to bringing in people from red brick universities, and I know from my experience there is a high chance that those candidates won't be of a BAME background."

"When people talk about degrees as role requirements, that automatically stops the opportunity of being able to recruit really good people."

Action Items

- **Seek interns, trainees and apprentices from a wide range of sources**, including vocational/technical schools, secondary schools and community colleges. Consider candidates with valuable real-world experience, who may not have a strong educational background.
- **Develop internal training programs** to upskill existing employees and to train promising candidates who lack the specific skills/knowledge required for the position.
- **Consider paying for the necessary education** of promising candidates and employees.
- **Make clear in all recruitment materials and efforts that degrees are not required.** Be clear about what characteristics and criteria are still mandatory: Loosening requirements about education does not mean that all standards go by the wayside. It simply means that organisations understand that high-end universities are not the only way candidates can receive the experience and education a job might require.
- **Try anonymised recruitment strategies to limit biases.** Interviewers, for example, could meet candidates without first seeing their CVs and even knowing about their educational backgrounds.





4.

CONTINUE TO INCLUDE NETWORKS AND DIVERSE EMPLOYEES IN THE PROCESS, BUT BE MINDFUL OF TOKENISM & FATIGUE

Organisational changes with respect to D&I are only successful if they truly make a difference for diverse candidates and employees. Their input is essential and they should be invited into the process early and empowered to make change by being placed on decision-making committees and working groups. However, the message that came across very clearly was that members of D&I networks doing the “heavy lifting” feared that their efforts could be used as “cover” for their organisations and that their message was not necessarily resonating beyond diverse employees.

Quotes

“Marginalised groups do all the heavy lifting for free, so what does that say about how important it is?”

“[D&I] platforms are used by the company but they also give them something to hide behind.”

Action Items

- **Bring diverse staff into the process early.** Their feedback on progress is essential, as is their input on the crafting and execution of a D&I strategy.
- **Have a strong, very senior executive drive the D&I agenda** and make sure D&I networks and working groups networks have a direct link to that person. This signals to all employees that D&I is a critical matter for everyone and not something that only pertains to diverse staff.
- **Consider remunerating leaders of the D&I networks** to acknowledge the importance and value of their work.
- **Ensure diverse staff are engaged**, just as much, **in non-D&I matters**. This is the essence of true inclusion. It rejects tokenism, a dangerous pitfall of weak D&I strategies. Diverse employees will know if their input is only wanted when it pertains to D&I issues. This will leave a bitter taste in everyone’s mouth and backfire.
- **Be mindful of fatigue:** Invite diverse employees into the process, but be respectful of their time. Too much reliance on their input can wear them down. Make use of outside resources, consultants and other experts to limit exclusive reliance on diverse staff, who are ultimately not the ones responsible for reforming a culture that has only erected obstacles for them.

5.

SHARE D&I STRATEGY AND PROGRESS WITH EMPLOYEES AND STAKEHOLDERS

Besides being keenly aware of D&I shortfalls in their organisations, employees that were interviewed expressed a yearning to know more about strategy and progress. Senior leadership acknowledged that clients and other external stakeholders are equally interested in learning more about D&I strategy and progress. Lack of communication and transparency about where things stand and how satisfied leadership is with the status quo leaves too much to the imagination. Employees who receive few updates might imagine that leadership is not doing anything at all to address D&I shortcomings, or that they are satisfied with the status quo.

Quotes

"When people join, they learn about the role but not so much about who we are, what we do, and what there is for them when joining. This doesn't just pertain to benefits or salary but their development, their growth, what's important to them. Maybe that's fasting when it is Ramadan or Passover or Lent or how they are being recognised as an individual?"

"Clients are asking about what we are doing about D&I and to articulate that better."

Action Items

- **Communicate organisational changes, progress and shortfalls** via an internal communications strategy in order to bring the entire organisation along for the journey.
- **Develop an external communications strategy** to be sure that partners, clients, customers and other stakeholders are also aware of D&I strategy and progress.
- **Invite feedback from staff and external partners** and use that information to tweak the strategy.





Diversity and inclusion is probably the most difficult but urgent cultural work of our time. And businesses play an outside role in either perpetuating or rejecting generations of biases and systemic discrimination.

Achieving the latter requires commitment and courage to see the process through even when things get uncomfortable.

When employees from privileged backgrounds chafe at changes, consider these words from one interviewee:

"It has always been about them and it still is, and really all we are trying to do is make it about some other people as well."

The interviewee continues:

"We have been directly discriminating in favour of white men for the past 250 years in our business. It is probably not too soon for us to be thinking about stopping doing it. But if we don't get the white people onboard with this then nothing is going to happen, because it is the white people who have all the power, and as a consequence [it is the white people who] have the power to make things change."

Empowered leaders of successful businesses can make things change by continuing to prioritise D&I. By being humble and asking for help, if the changes are made with rigour and honesty, they will truly impact lives and improve, grow and advance organisations.

Recommendations for Next Steps:

It is clear from our conversations and wider knowledge that whilst each organisation is aiming to deliver D&I, and there is excellent networking and sharing of ideas within them, this is all very informal and to an extent ad hoc. The amount of activity in training and experience gained over several years suggests that there are sufficient data to create and develop a self-assessment Equality, Diversity and Inclusion matrix that helps each organisation assess the maturity of their diversity and inclusion policies, programs and activities. The matrix would be a valuable tool in helping businesses to identify opportunities, track progress on current interventions, measure impact and evaluate the return on investment.

The research team at WE LEAD at the University of York will consider how this can be progressed and delivered with interested parties.



Acknowledgements

The research was undertaken by:

- Professor Kiran Trehan,**
Director, Centre for Women's Enterprise, Leadership, Economy and Diversity (WE LEAD) at the University of York
- Zach Giglio, CEO, GCM & Research Associate,**
Centre for Women's Enterprise, Leadership, Economy and Diversity (WE LEAD) at the University of York
- Liz Frost, Project Manager,**
Centre for Women's Enterprise, Leadership, Economy and Diversity (WE LEAD) at the University of York

The research was funded by the following organisations:

- CBRE
- Colmore Business Improvement District
- JLL
- KPMG
- Shoosmiths
- Wesleyan
- West Midlands Combined Authority
- West Midlands Growth Company

We would like to thank everyone who took part in the in-depth interviews and focus groups for their time and input.



UNIVERSITY
of York

york.ac.uk



@UniOfYork



/universityofyork



uniofyork