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# DIVERSITY MANAGEMENT THAT WORKS

An evidence-based view

**Research report**  
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## Research report

# Diversity management that works: an evidence-based view

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# 1 Foreword

A common challenge when designing diversity and inclusion (D&I) interventions is knowing where to start. Should people professionals tackle recruitment bias through training programmes? What about building an inclusive leadership culture? How about plugging the huge gaps in monitoring data? Diversity and inclusion issues can present themselves in many ways, so knowing what to fix can seem difficult or even impossible – and the result can sometimes be practices or interventions that are disconnected or even ineffective.

Good intervention design is only possible when the problem itself is fully understood. Going straight to the solution can cause real issues: resources are wasted, programmes are ineffective and stakeholders lose interest, or are even harmed. Our recent study, *Building Inclusive Workplaces*, showed that a key step lies in mapping the issues themselves before exploring what works.

HR must be evidence-based in designing strategies and practices. Evidence comes from four sources in particular: data from the organisation, scientific publications, professional expertise, and the views of key stakeholders. All these types of evidence are critical to improving decision-making. But bringing them together is sometimes a real challenge. Information may be inaccessible, data in HR systems might be of poor quality, scientific research can seem impenetrable, and there might be a lack of available inclusion expertise. Often the nature of the inclusion problem itself just isn't well understood, and without enough information about the problem, it's almost impossible to implement an effective solution.

With these challenges in mind, we decided to investigate workforce diversity practices applying the principles of evidence-based practice and bringing together the different forms of D&I evidence. At the heart of this study is the concept of co-creation with real practitioners. By working closely with people professionals, we bring a new level to our analysis to build recommendations that are not only research-based, but also relevant to practice. The result of this collaboration and knowledge exchange is a rich and powerful collection of insights that illuminate the scope of the challenge and plot a path forward for practitioners working today.

We hope you find the insights in this report informative and are able to take forward some of the practical ideas and apply them in your work.

**Edward Houghton**, Head of Research and Thought Leadership, CIPD

## 2 Introduction

### Evidence-based D&I

There is a wealth of literature, commentary and discussion on the problems of workforce inequality – from discrimination in recruitment to pay gaps and barriers to progression, from bullying and harassment to exclusion and inequality in social networks, and across all strands of diversity. These include age, disability, sex, sexual orientation, gender reassignment, gender identity, marriage and civil partnership, pregnancy and maternity, race, religion or belief, social class and neurodiversity. The moral imperative for increasing workforce diversity and inclusion (D&I) is clear. And, although the evidence on a general link between diversity and performance is weak, there are nonetheless strong strategic rationales for many employers to pursue it.<sup>1</sup>

Given all this attention, it is perhaps surprising that we find little discussion of evidence on ‘what works’ in diversity. Or more precisely, what strategies and practices seem to be the best bet for increasing workplace diversity and inclusion.

This report sets out to help address this gap, providing evidence-based, practitioner-relevant recommendations on how to increase workforce diversity.

To do this, we drew on the principles of evidence-based practice, an approach to make more effective decisions by drawing on four key sources of evidence: scientific literature, organisational data, practitioner expertise and stakeholder views.

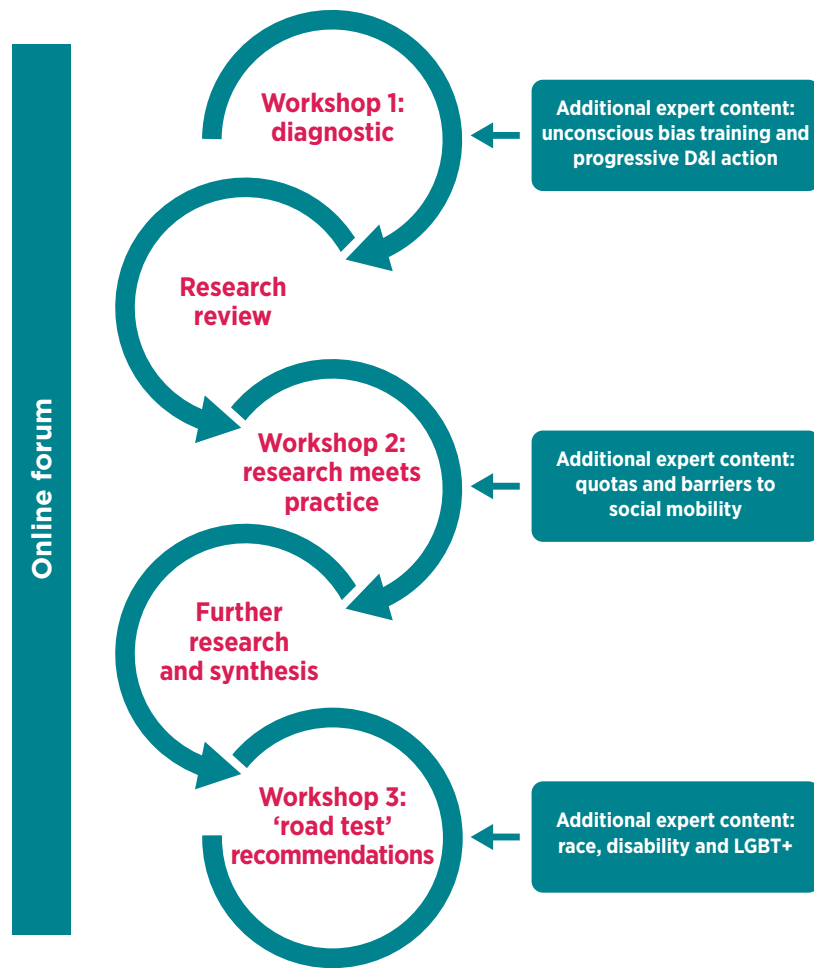
It is worth noting that evidence-based practice is not about providing a definitive answer to a question, but increasing ‘*the likelihood of a favorable outcome*’.<sup>2</sup> Even if we take a systematic and comprehensive view of the scientific research, we cannot establish ‘best practice’ because employers need to consider their context and because the body of research develops over time. Instead, we offer recommendations as ‘best bets’ and illustrate how these might look in practice.

### Key issues in D&I

The main focus of this work is not the barriers to equality or the business case for diversity, but rather, what employers can do to progress it. This is a complex and multifaceted area, so we have focused on six priority areas identified in our workshops with D&I professionals. These are:

- 1 understanding organisational context and adapting D&I approaches accordingly
- 2 getting buy-in and commitment to D&I
- 3 making use of people data to guide and evaluate action
- 4 using diversity training effectively
- 5 managing the tension between ‘organisational fit’ and diversity
- 6 the role of positive action approaches.

Figure 1: Evidence-into-practice programme



### Our research approach

Practitioner expertise and stakeholder views are crucial for diagnosing issues and identifying potential solutions. But managers should combine this with insights drawn from scientific research and organisational data to help them avoid bias from personal opinions and make better decisions.

This report is based on an evidence-into-practice programme that brought together professional expertise on D&I with insights from scientific research (see Figure 1). Our lines of enquiry came from a group of D&I professionals discussing the challenges they faced in their work and the concerns of their stakeholders. Based on these questions, we searched and reviewed the scientific literature. Having presented the findings of our review to our group of D&I professionals, we drew up recommendations based on the research and professional expertise. In addition, we ran an online discussion forum for people professionals from a range of backgrounds and specialisms, to gain further insight and test the robustness of our conclusions.

In the following sections, which deal with the six priority areas, we first present the issue and research questions, followed by the research evidence and practitioner insight. Each section then concludes with evidence-based recommendations and a comment on the quality of the evidence available. The final section of the report summarises our conclusions.

Where we explore views of D&I professionals in this report, these are drawn from our workshops with senior D&I professionals, unless otherwise stated.

## 3 D&I in different contexts

### The issue

To be successful, any workplace initiative or strategy must consider organisational context. Solutions that work in one context may not be relevant, appropriate or effective in another. This is why the term ‘best practice’ is misjudged.<sup>3</sup> In the case of strategies and practices in D&I, relevant contextual issues include organisational location, size, sector, strategic orientation and which demographic groups are underrepresented.

We can see contextual differences in employers’ drivers for increasing diversity. As we discussed in previous research, the evidence of a clear, generalisable link between diversity and performance is weak,<sup>4</sup> but there may still be specific business cases for employers to invest in it. That is to say, employers identify their wider strategic challenges, and then consider the extent to which particular approaches to promoting diversity can help with these.

One example of this might be DIY firms focusing recruitment on the recently retired, who often have a wealth of DIY knowledge and a desire for flexible hours. In contrast, public sector organisations must consider the Public Sector Equality Duty, which again changes D&I context for the NHS, police, fire service and others.

Across these different contexts, the extent to which a particular approach to diversity ‘works’ may be contingent, as it is a response to a particular strategic and sector context. Similarly, where we consider that the workplace challenge is more about institutional discrimination (as a result of company structures and processes) than the individual prejudices of some workers, specific prescriptions may vary, and impacts from one intervention may not be identical across all contexts. These are important issues to consider, and where we have evidence of any variation in impacts across different workplace contexts, these are made clear.

### Our research question

We examined the evidence on how the effectiveness of D&I strategies and practices varied in different organisational contexts, including in:

- multinational organisations
- large versus small or medium-sized organisations
- different sectors or industries.

We did not find any scientific evidence available on differences in the effectiveness of D&I strategies across organisation sizes or sectors, but we share insights on these areas based on practitioner insight. Our study reports on findings from an academic literature review of the effectiveness of D&I strategies in multinational organisations.

### What’s the evidence on diversity context?

The body of research on D&I in multinational organisations focuses on the challenges that exist for D&I strategies, the need to understand local issues and the balance between local and global strategies.

### Challenges in enacting global D&I strategy

If an organisation operates across locations with varying cultural norms, this has clear implications for its D&I strategy. For example, ethnographic research on a Danish multinational corporation identified that the values of diversity and inclusion, which were well embedded in the headquarters, proved problematic in its Saudi Arabia office.<sup>5</sup>



While no clear solutions were found, the research suggested that these values should be 'reinterpreted' for the Saudi context.

Further, a longitudinal case study of a Finland-headquartered multinational highlighted challenges for businesses operating in different international regions, even if they claim to have progressive attitudes towards diversity.<sup>6</sup> For example, where gender diversity was already seen as a 'non-issue', there was in practice resistance to implementing new D&I practices around other types of diversity that were just emerging as recognised areas to address.

Cultural and legal differences may make it risky for organisations to impose one region's people management practices onto another. For example, case study research of US-headquartered multinationals cites attitudes towards US 'affirmative actions' as a potentially serious barrier to diversity management in European countries.<sup>7</sup>

### **The importance of understanding diversity at a local level**

An effective global D&I strategy will take into account local-level issues, challenges and opportunities. One potential barrier to this concerns the diversity of senior-level management and its ability to connect with local workforces. Case study research in a Germany-headquartered multinational found that a lack of diversity among the 'global elite' management made it more difficult for them to appreciate cultural differences in its UK offices.<sup>8</sup> As a result, employees found it difficult to voice their concerns.

*'An effective global D&I strategy will take into account local-level issues, challenges and opportunities.'*

Employees need to see how diversity practices are relevant to local-level issues. For example, a survey-based study of Chinese workers suggests that diversity practices relating to pay and progression may have a greater impact on behaviour than those relating to training.<sup>9</sup> The explanation given was that pay issues rather than training were the cause of labour disputes.

Another important factor in enacting international D&I strategies is local-level attitudes towards diversity – that is, whether it is generally seen as a legitimate issue that should be discussed. Diversity is simply higher on the agenda in some regions than others. For example, research in an Austrian multinational found that while the head office prioritised D&I practices supported by an equality charter, these gained little traction in its subsidiary in Bosnia and Herzegovina.<sup>10</sup> In this local context, managers felt a focus on diversity management was unnecessary as legislation required them to treat all groups equally (this suggests a lack of understanding of diversity rather than exemplary law).

Such differences can also work the other way around, with D&I being more prominent in subsidiary countries than headquarters. For example, qualitative research in a multinational Japanese motor firm found that ideological or political debate on equality is rarer in its Japanese head office than in its US arm; this was reflected in factors such as the number of trade union disputes and legal complaints relating to diversity.<sup>11</sup> In this way, we see potential for 'upwards' influence on D&I, with headquarters responding to the expectations and leadership from its overseas subsidiaries.

### **Global versus local D&I strategies**

Given these challenges, should organisations take a global approach to diversity, or should regional teams be responsible for creating and implementing strategy? Research on multinational organisations acknowledges the tension between local responsiveness and upholding global values.<sup>12, 13</sup>

It seems many employers recognise the balance that needs to be struck here. For example, a study of eight global MNEs with US headquarters identified the most common approach to international D&I strategies was a corporation-wide plan that developed local-level initiatives.<sup>14</sup> This approach was typically explained on the grounds that diversity initiatives should be guided by the same values internationally but needed to be owned at a local level.

Others take a more critical view, arguing that global frameworks often ignore local culture, legislation and norms, and diversity strategies may be better led locally.<sup>15</sup> A ‘grassroots’ approach seems more likely to gain managers’ buy-in, as they are more engaged with the issues that are being focused on. Such an approach will need to ensure that local-level D&I champions have enough time and resource to take on this role,<sup>16</sup> and multinationals may face further complications if their approach to D&I is not aligned or consistent across the corporation.

### **Note on the body of research**

More research on the effectiveness of D&I strategies and practices in different sectors and sizes of organisation is needed. There may be some parallels to draw between multinationals and large multi-site organisations operating in a single country, but they are likely to be limited. Operating between a centralised headquarters and local branches is likely to be less complex in the same country under the same law and national culture.

One fruitful area for research would be differences in large and small organisations’ D&I strategies. Here, there are some clear legal differences as, for example, employers with fewer than 250 employees are not affected by legislation on gender pay gap. Equally, there are sectoral differences, with public bodies subject to the Public Sector Equality Duty that requires more advanced steps to eliminate discrimination. How do such differences play out in practice?

*‘Case studies and interviews ... give insight into approaches used and challenges faced, but don’t do a convincing job of showing what is effective.’*

The body of research on D&I in multinational organisations is more established but dominated by case studies and interviews with managers and HR professionals. These give insight into approaches used and challenges faced, but don’t do a convincing job of showing what is effective. In particular, research on the tension or balance between local and global approaches to D&I is largely qualitative and there is little evaluation of the outcomes of different strategies. We need more empirical research in this area.

### **Practical insights into diversity context**

#### **Diversity in global contexts**

Reflecting the scientific literature, practitioners we consulted agreed that there is potential for tension between global and local diversity practices: while a company can take a global perspective, the reality is that there will always be local cultural nuances. How can businesses successfully implement a global D&I strategy while accounting for local context?

We found broad consensus that multinational employers should set strong company values and guiding principles, with implementation ideally led by empowered local managers who are committed to D&I. For example, in a region where gender equality is low, organisations can nonetheless set clear company values and expectations of behaviour, and strive to create a safe, harassment-free environment with improved opportunities for women. Differences will still exist between countries, but the general direction is shared.

Legislative differences may create tensions within multinationals and must be considered within their D&I strategies. For example, shared parental leave is legislated for and promoted to a greater extent in Scandinavian countries than the UK, and not at all in many regions worldwide. One option for multinational employers is to develop frameworks for rights and behaviours that transcend legislation; if so, they will need to carefully consider the extent to which these detail specific practices, as opposed to broader principles and values.

Local-level cultural and legislative norms become even more important when organisations consider international mobility. For example, an LGBT+ employee must be able and supported to make an informed decision on a work assignment in a region where their sexuality is stigmatised or even illegal. Employers can take a stand for equality globally, but at the same time must be flexible to uphold their duty of care for individual employees.

### **Diversity and organisation size**

Our online discussion forum illustrated that businesses of all sizes face challenges in D&I strategies and practices. For example, smaller businesses with little turnover and recruitment have fewer opportunities to increase diversity through recruitment. In addition, they may have less resource and funding to promote D&I than larger businesses. As one participant noted:

*'Being part of a smaller organisation [around 100 employees] means that, while the intention may be there, lack of funds and resources often mean that D&I is left behind somewhat.'*

Larger organisations are likely to have more hiring power as well as resources for D&I programmes; one participant noted that:

*'At a global level we are able to reach out to a diverse range of individuals when recruiting.'*

On the other hand, larger organisations may face additional complexities if they employ a wide range of professions or have dispersed workforces. Another commentator put it like this:

*'We cover a wide range of services and job roles and so the ways in which we communicate with different groups of people can be different and therefore full "inclusion" can be hard.'*

Organisations of different sizes facing different challenges in executing D&I strategies are likely to adopt different approaches. However, views from our forum suggest that, irrespective of size, the overriding factor in how well businesses support diversity is its climate and the commitment it shows.

### **Recommendations**

Based on current research and expertise, we make the following recommendations as evidence-based 'best bets' to improving D&I strategy in multinational organisations.

#### **'Loose fit' global strategy**

As with any organisational strategy, a D&I strategy needs to be based on a clear case for action and change, aligned with wider company values and operational priorities. Once a global headquarters has articulated its commitment to D&I, it can provide a framework on which to guide behaviour and champion equality in all regions and ensure the safety of employees globally.

As a guiding principle, we recommend that multinational employers aim for a 'loose fit' in global D&I strategies. That is, where D&I is being led by an international headquarters, local-level practices should be adapted to their particular context, yet should still reflect the principles of the parent company and be held accountable for this.

For any D&I practices to be successful, they must be embedded into general work practices, rather than something done as an isolated activity by HR or employee resource groups.

### **Understand local issues**

D&I specialists operating at a global level need to work with subsidiaries to understand their context and receptiveness to D&I, so that they can ensure that initiatives are appropriate and effective in that region. They also need to understand the current state of play in workforce diversity across their locations, considering:

- **Local legislation:** What local legislation related to equality and diversity is in place, and how does this differ from the location's headquarters? This might also extend to human rights legislation and protection more broadly.
- **Local culture:** What is the 'starting point'? How progressive is the region when it comes to equality? Is D&I culturally accepted as a legitimate area, is it seen as a priority and do employees feel safe to raise issues relating to this?
- **Local social issues:** What are the local-level priorities in workforce diversity? For example, some countries may focus more on social mobility or socioeconomic status than on legally protected groups; or may see different strands of diversity (ethnicity, gender, and so on) as presenting the most pressing issue in inequality.

### **Guidance, support and resources**

Those leading D&I programmes in subsidiary countries may need tailored support from the global headquarters. This could include analytical capability for country-level workforce data and resources for D&I activity.

Multinational organisations should also consider their duty of care towards employees on overseas assignments. This may include giving information that allows employees to make informed choices about where they work and where they travel to, or how they behave when they are there. A key example is information on cultural sensitivities, norms, and legislation that might impact the rights of LGBT+ employees. Specifically in regard to LGBT+ issues, Stonewall has produced global workplace briefings on LGBT+ for organisations operating around the world.<sup>17</sup>

### **Local-level leadership on D&I**

If D&I is being driven by a subsidiary rather than the parent company, the situation may be quite different. Here, local-level leaders should take advantage of whatever scope they have to progress D&I within their country divisions. This may result in creating expectations or demands within the multinational organisation that prompt headquarters to take a more progressive approach to D&I.

### **Evaluate D&I data and outcomes at a local and global level**

Employers will benefit from more evidence on what type of approaches work in implementing global D&I strategies. They can work towards this by:

- identifying meaningful success measures for local contexts that recognise country-level priorities in diversity
- monitoring progress and evaluating the effectiveness of local-level practices.

As we discuss in section 5, such evidence will inform better decisions within the organisation.

## 4 Buy-in and commitment to D&I

### The issue

Limited 'buy-in' from colleagues could seriously hamper D&I progress, so finding ways to increase commitment through the organisation is an important practical step.

We consider what we mean by buy-in, including different levels and types of buy-in and behaviours associated with them. We also consider who most needs to be bought in to D&I strategies and practices and how to get people on board.

### Our research questions

- 1 What impact does buy-in or commitment have on D&I strategy outcomes, considering both the type and degree of commitment?
- 2 How important is it that (a) senior managers, (b) middle managers and (c) supervisors are personally committed to D&I strategies and action?
- 3 What are effective ways to get people on board with D&I strategies and practices in organisations?

The body of research on buy-in specifically to D&I strategies and practices is limited, so we broadened the scope of our search to include buy-in to other management interventions.

### What's the evidence on buy-in to D&I?

#### Senior management support

Research evidence indicates that, in general, management interventions are only likely to succeed when actively supported by senior management, both initially and on an ongoing basis.<sup>18</sup> Progress on D&I is similarly unlikely without the influence of senior managers. This can be manifest by showing active support for D&I and a genuine appreciation of difference, which should foster a culture of inclusion and ensuring employees throughout the organisation understand how D&I goals align with organisational objectives.<sup>19, 20</sup>

Qualitative research conducted with a small number of senior executives found that they viewed D&I as an area that required considerable time, energy and skill, but that the benefits outweighed the costs.<sup>21</sup> However, such attitudes may not necessarily translate to practical commitment. Survey evidence from the Australian private sector found that more than half of middle managers did not think D&I was in the top ten priorities of their companies (see below). This points to a lack of meaningful leadership on D&I from senior management.

Senior managers may support D&I because of a business case or from moral imperative (the 'right thing to do').<sup>22</sup> In either case, their influence through HR professionals and other managers is crucial and, as with all change, it is hard to achieve without effective implementation and communication. Making the case to middle managers and the wider employee body may be helped where there is a clear business case for particular diversity interventions, especially when middle managers see that this supports them in tackling their everyday challenges. For example, companies aiming to secure business from new demographic groups may target recruitment at individuals from these groups to secure relevant market insight. Positioning positive action like this as a way to help managers achieve targets may act as an influential business case.

#### Lack of support from middle managers

Research on Saudi Arabian public service organisations suggests middle managers may particularly lack commitment to continuous improvement programmes.<sup>23</sup> It seems this may be down to them not fully understanding programme aims and benefits, not appreciating the level or type of commitment that is required of them, or not believing that they have authority and influence to help deliver the programmes.

More specifically, a survey of mid-level managers in the Australian private sector found limited understanding of D&I.<sup>24</sup> What's more, although HR managers tended to be better versed in D&I, many of them nonetheless failed to endorse it and were sceptical of its value. This is worrying. If an HR function does not prioritise D&I, the chance of it being taken seriously elsewhere in the organisation is slim.

*'If an HR function does not prioritise D&I, the chance of it being taken seriously elsewhere in the organisation is slim.'*

As mentioned above, this survey also found that most middle managers did not think D&I came high in their company's priorities. It seems likely that these findings are related. If mid-level managers (including HR personnel) are not bought in to D&I, it is likely a reflection of the priorities that they perceive from the top. They will take their cue from messages on strategy and operational priorities, KPIs and rewards, and the like. Thus, some senior management may believe they champion D&I, for example through policies and pledges, but these can be little more than 'empty shells'<sup>25</sup> and indeed may be viewed as such by others in the organisation.

### **Getting people on board**

Extensive research on 850 US workplaces over a 30-year period by Dobbin, Kalev and colleagues found that most D&I practices fail because they restrict managers, limiting their autonomy or discretion.<sup>26, 27, 28</sup> The result is that day-to-day, managers resist or ignore the initiatives, making them null and void in practice.

The research lists restrictive D&I initiatives as including mandated training that tells people what they can and can't say or do, and punitive measures that use grievance and disciplinary procedures to 'correct' biased managers. Equally, managers may refuse to use required tests when recruiting employees, or may ignore the results; and similarly, structured performance management systems have the potential to advance equality and diversity but, in practice, '*raters tend to lowball women and minorities in performance reviews*'.<sup>29</sup>

Dobbin et al argue that a key to increasing diversity lies in reducing managers' resistance and getting them on board. This is done by engaging them in promoting D&I efforts in ways that feel more empowering than prescriptive. An example is combining clear diversity targets and transparent hiring processes to get more diverse pools of applicants. A clear reason this works is because employers are asking managers for help instead of dictating terms. Positive behaviours are reinforced, effectively holding managers accountable and pushing them to scrutinise their behaviour and decisions for bias, but managers can still be free to decide how they work towards these aims.

### **Note on the body of research**

Most of the research we found on buy-in and commitment to D&I is theoretical, rather than being based on empirical evidence specifically on this subject. The empirical research that does exist is generally qualitative, drawing on interviews, focus groups, qualitative surveys and the like. These give us some good insights, but further research is needed to establish cause-and-effect relationships.

### **Practical insights into gaining buy-in**

Our discussions with practitioners broadly echoed the research evidence on the importance of buy-in and gave further insights into what this looks like and how it can be achieved.

### Three aspects of buy-in

Three aspects of senior management buy-in to D&I were proposed, which can be seen loosely as different levels of commitment:

- advocacy (arguably the easiest)
- resources to support activity that promotes D&I, recognising that it needs investment
- holding people to account, both through KPIs that incentivise managers and being willing to 'call out' and act upon bad behaviour, applying sanctions when needed.

### Buy-in at different levels of management

Senior managers' buy-in was recognised as fundamental to effective D&I strategy and practices. A particular role was seen for them in advocacy: communicating values and recognising that the culture and values of the company need to change. This could be particularly powerful when they were from traditionally dominant organisational groups. For example, senior male managers were viewed as important agents for change in furthering gender equality. In this sense, the practice actively promoted in the area of LGBT+ of identifying 'allies' is potentially transferable to other strands of diversity (although perhaps with a different label than 'allies').

*'Line managers throughout the organisation need to "own" the diversity strategy, enacting it to shape the lived experience of employees.'*

D&I professionals argued that line managers throughout the organisation need to 'own' the diversity strategy, enacting it to shape the lived experience of employees. A challenge was seen in that managers often fail to buy into D&I strategy when it doesn't benefit them or directly relate to their experience. This need not be a case of managers personally benefitting from inequality, but of apathy from not seeing diversity as a pressing issue. For example, why widen or diversify the talent pool, some might argue, when we already have large numbers of job applicants?

Particular criticism was directed towards middle management, who a number of practitioners saw as the main barrier to change when they become entrenched in their own attitudes and resist D&I practices. In contrast, senior managers were generally felt to be more committed – for example, as shown by sponsoring particular strands of D&I. This presents a view of middle managers as a problematic layer of 'permafrost' that is hard to break down.

### A distraction from operations?

The idea of middle management as 'permafrost' clearly has some appeal to those trying to lead change, but we attempt to unpack this and call it into question.

In our conversations with practitioners, it was generally recognised that a fundamental reason for middle managers' lack of commitment to D&I was their preoccupation with operational issues, such as staffing and short-term performance, and a perception that D&I competed with or at least distracted from the effective running of the business. This brings us back to the level of commitment from senior managers. If they advocate D&I but set KPIs that ignore it and expect middle managers to support it with no extra resources, middle managers may interpret this commitment as only nominal and it is understandable if they do not see D&I as relevant or achievable in their areas. As noted in our discussion of the research, a lack of support from middle managers may be due to perceptions that pledges on D&I are 'empty shells' and do not reflect top priorities.

In short, if commitment from middle managers is lacking, it seems appropriate to ask whether senior managers are paying lip service to D&I. Senior managers need to understand exactly how D&I strategies are relevant to their directorates and recognise that their role goes far beyond advocacy to providing resources and holding their parts of the business to account.

### **Evidence on the benefits of D&I**

A common belief in our workshops was that employees need to see evidence on how D&I benefits the organisation to genuinely buy into it. Insights from our online forum suggested that part of the solution to this problem was to illustrate, rather than just state, the benefits of D&I to managers and the wider organisation. As one participant noted: *'Show them what it can mean to the bottom line, to creativity and ideas when they have a more diverse workforce. The most ineffective way is by telling them that they **have** to do it.'*

*'Making it clear to middle managers how greater workforce diversity can help them achieve key performance targets can be a strong complement to the moral case for D&I.'*

Scientific research shows only weak evidence that greater diversity generally contributes to bottom-line performance.<sup>30</sup> Capturing clear evidence that, across differing strategic contexts, the enhancement of diversity systematically leads to impacts on business performance is a serious statistical challenge – similar to the challenge that still remains, of clearly linking employee well-being to business outcomes. This is not to deny the business benefits of workforce diversity but to suggest that they are contingent on organisational context.<sup>31</sup> Workforce diversity and performance are compatible bedfellows in the medium to long term and there are performance-related arguments, such as diversity supporting innovation and responsiveness to diverse customer bases. However, one issue that is often missed in the business case literature is that building more diverse workforces can be a slow process that incurs upfront costs, as in the case for most organisational change.

In short, both because the picture is complex and upfront investment may be needed, arguing for D&I on the grounds of automatic performance gains may be unconvincing. But making it clear to middle managers how greater workforce diversity can help them achieve key performance targets can be a strong complement to the moral case for D&I.

### **Do people managers recognise their role in D&I?**

In line with our discussion of the research, one proposal to increase middle management commitment was to challenge the assumption they have nothing to add to D&I, or challenge a lack of motivation to change things, by emphasising their agency in employee experience.<sup>32</sup> As argued by Dobbin et al (see above), a more promising approach than positioning D&I practices as (potentially constraining) processes that must be adhered to, is emphasising that managers are in a position of influence and their active support is important.

### **People managers' confidence to support D&I**

Another insight from our D&I professionals was that people managers often do not feel confident to approach issues related to D&I, as asking about personal characteristics is felt to be too sensitive. For example, managers may find it unnerving to ask about something that may relate to an employee's religion or sexual orientation. It can be easier for managers to avoid these issues, leading to what has been termed 'micro aggressions', inadvertently or carelessly side-lining minority or disadvantaged groups rather than openly approaching issues that may affect them.



People managers need to be bold in approaching issues openly, not to avoid or hedge around them. They can be helped by being given greater understanding of minority and disadvantaged groups, but there will inevitably be points at which their understanding falls short. Employers should thus encourage a psychologically safe environment in relation to D&I. If employees inadvertently use the wrong language, they and their colleagues should accept this, and they should then learn and try to get it right.

### **Recommendations**

Based on current evidence, we make the following recommendations on getting buy-in to D&I strategies and practices.

#### **Advocacy**

Employers should ensure that all employees throughout the organisation understand the priority of diversity and inclusion. This is particularly key for senior managers, who play a leading role in focusing other employees on D&I. It is important that they become role models for change and help people understand how D&I fits with the organisation's culture and operations.

The case for D&I as a performance-critical issue is inconclusive in the research and may fail to convince employees. A more convincing core message may be: increasing D&I is ethically right, strategically important and compatible with operational performance.

#### **Resources**

Senior managers should recognise that improving in D&I will not happen through advocacy alone. They should also note that middle managers often perceive D&I as making operations more difficult. For example, spending time targeting different groups to widen the pool of talent will lengthen the recruitment process, and senior managers must consider how to approach this.

Ensuring managers understand the positive benefits that will come from their commitment to D&I is vital, but so too is giving them the time and resource they need. To incentivise employees and hold them to account, senior managers must put their money where their mouth is, treating D&I not as a 'culture' or 'values-based' optional extra, but as a core part of operations.

#### **Accountability**

Progress on D&I requires managers throughout the organisation to be held to account, both through the KPIs they are measured against and through unhelpful and unacceptable behaviour being called out.

Employers should translate D&I strategy to each level of business by developing a framework in which everyone can take part, thus moving theory into practice. For example, managers need to understand why the organisation needs to make senior management less homogenous and remove barriers to career progressions for particular groups.

Challenge may well be needed at an operational level. D&I can't be left to those who currently believe in it; it needs to be pushed to directly shape behaviours, including through the most strongly leveraged means employers have. For example, this could include setting workforce diversity targets that are considered in recruitment and retention, and setting desired behaviours for people managers that support D&I. Nonetheless, challenge should be constructive and offered alongside support. The ultimate aim should not be punitive but to help the organisation change.

### **Emphasise management agency**

Employers should emphasise the importance of managers playing an active role in D&I, treating them as key players rather than a resistant ‘permafrost’ that won’t play ball. To reduce resistance to D&I strategies and practices, employers should allow people managers a degree of control in decision-making, rather than forcing practices on them that limit their autonomy and may be seen to disempower them. Further, D&I professionals should recruit people managers as change agents for D&I, emphasising that they play a critical role, and challenge any view that D&I policies are irrelevant and hamper their ‘real’ job.

*‘Recruit people managers as change agents for D&I, emphasising that they play a critical role, and challenge any view that D&I policies are irrelevant and hamper their “real” job.’*

In principle, one way to balance being prescriptive with empowering managers may be to set workforce targets that allow for flexibility. An example shared in our workshops that seems to have potential was to focus team managers on hiring ‘one different’ new recruit year on year (for example, an additional ethnic minority or LGBT+ employee) and, while holding them to account for this, allowing them to decide which groups to target.

We would advise caution in replicating this practice. Although it was viewed as successful in the organisation in question, such initiatives need proper evaluation before being recommended more widely. An important consideration is that managers should not be setting diversity targets that reflect their personal biases. Decisions on which groups to target should be informed by reliable workforce data. This in itself does not preclude involving managers in setting targets, but it is also worth noting that in some situations, perhaps counterintuitively, self-set targets are less effective at improving performance than supervisor-set targets.<sup>33</sup> Whether this is the case for D&I, which may require a high degree of buy-in, is unclear.

In short, we need more research, but the idea of involving managers in decisions to get them on board shows some promise.

### **Support for people managers**

People managers play a vital role in developing inclusive teams. They have a great deal of influence on day-to-day behaviour – for example, whether or not colleagues exhibit ‘micro aggressions’ (regular comments or behaviours that are intentionally or unintentionally hostile or demeaning about disadvantaged or stigmatised groups). Employers should thus provide training that raises managers’ awareness of issues for disadvantaged and minority groups and provides them with the skills to promote inclusive environments and address unhelpful or unacceptable behaviour.

Managers should also be encouraged to be confident in openly approaching issues that may relate to personal characteristics of these groups and to accept that they may inadvertently ‘get it wrong’, but to aim to learn and ‘getting it right’ in the future instead of hedging around issues.

## 5 People data and diversity

### The problem

In order to set strategies, identify effective practices and make a powerful case for workforce diversity, employers need good-quality data on their people. They need to know the nature and extent of challenges in their organisation – for example, in the gender pay gap, inequality in career progression, or barriers to participation in work for those with disabilities or caring responsibilities.

### Our research questions

- 1 What quality and coverage of D&I-related data do organisations have? What data do they have available and what do they make use of?
- 2 Which type of data might best be prioritised to inform and evaluate D&I strategies? It is important for employers to know what aspects of D&I they should ideally be collecting data on and what they might focus on when resources are limited.
- 3 What encourages employees to disclose their personal characteristics, to improve the quality of workforce data?

### What's the evidence on diversity data?

#### What types of data can employers collect?

There is potentially a wide range of data to collect and analyse relating to D&I. Case study research finds examples in UK practice of:<sup>34</sup>

- descriptive measures, such as workforce characteristics – for example the distribution of age, gender, tenure, disability and sexual orientation or gender identity
- how other key points of people data, such as pay, promotions, employee turnover, and grievance data, vary by diversity criteria
- how performance varies according to age and tenure
- measures of efficiency and effectiveness, such as levels of participation in diversity and ethics training, and other assessments of diversity policies.

Similarly, a qualitative study of eight MNEs headquartered in the USA found that diversity data was collected on promotions, turnover and retention and absentee rates; measuring financial returns and behaviour change were seen as more challenging.<sup>35</sup> The most common tools for data collection were employee surveys and HR monitoring data, closely followed by performance management reviews and 360 feedback. Some employers used customer feedback and focus groups.

#### Quality and coverage of diversity data

Despite the wealth of opportunities, current evidence suggests UK employers are poor at collecting data on workforce diversity.

This can be seen in the McGregor-Smith Review of race in the workplace commissioned by the UK Government, which pointed to a lack of transparency on workforce data.<sup>36</sup> To illustrate this, the report pointed to the fact that only 74 FTSE 100 companies responded to the call for evidence. CIPD survey research with UK employers also found a lack of workforce data on race and ethnicity, both in coverage and quality.<sup>37</sup> It found that *'many employers still don't collect even basic workforce data about who they employ, or do collect it but don't know how to access it or how to use it'*. For example:

*'Although 71% [of employers] said their company reports on gender, just 21% report on BAME diversity. A weighty 83% said they need to have better data to drive progress on race and ethnicity, but interview data suggests collecting the data is a challenge for many companies.'*<sup>38</sup>

We can see the paucity of data in other areas too. For example, Khan et al's (2019) analysis of 274 UK sustainability reports found a clear lack of corporate disclosures on the employment of people with disabilities.<sup>39</sup>

### **UK legislation on diversity data**

The poor state of workforce diversity data in the UK is partly explained by the legislative context. The only legal requirements UK employers have to report on diversity demographics regard gender and, in Northern Ireland, religion.<sup>40, 41</sup> This is notably less than the USA, where employers must monitor the racial or ethnic and gender composition of their workforce by specific job categories.<sup>42</sup>

*'Employers should be clear and transparent about why they need to collect employees' personal data and how they will use and protect it.'*

Regarding workforce data that employers are permitted to collect, the UK legal position is that employers do not need employees' permission to keep data on their sex and age, but do usually need their permission to keep other forms of personal data – that is, data which identify or can help identify an individual.<sup>43</sup> Sensitive personal data requires a higher level of consent and protection. This includes:

*'race or ethnic origin, political opinions, religious or other beliefs, membership of a trade union, physical or mental health, sexual life, and offences. Employers may only collect this data when they have consent from the employee, it is necessary to carry out a legal obligation, or one of another of "a narrowly defined set of conditions".'*<sup>44</sup>

Despite these limitations, guidance from the UK Government's Information Commissioner's Office<sup>45</sup> should give employers confidence in collecting relevant data relating to workforce diversity. In general terms, *'the purpose of identifying or keeping under review the existence or absence of equality of opportunity or treatment'* is a valid reason to collect and store sensitive personal data.<sup>46</sup> Conditions that need to be met include:

- data collected is relevant and not excessive
- questions used allow potential or actual workers to identify themselves accurately
- data is used only to monitor equal opportunities
- data is anonymised unless there is a genuine need for it not to be
- safeguards are in place to protect the data storage
- informed consent is given – people are told how the data will be used and can opt out of providing it without facing a penalty.

Employers may need to be more careful in collecting equal opportunities data after they have appointed an employee. During the recruitment process, employers are not generally *'prevented from requiring the employee to provide information of a personal kind at the hiring stage'*, but *'once the employment has begun, an employer's request for private information could amount to a breach of the duty of mutual trust and confidence'*.<sup>47</sup> On the other hand, however, candidates at recruitment are not obliged to disclose data.

As a general rule, there is a strong argument that employers should be clear and transparent about why they need to collect employees' personal data and how they will use and protect it. This also relates to questions of disclosure (see below).

### Methods of data analysis

Scholars have developed various diversity metrics that allow organisations to benchmark the representativeness of their workforce using state-level equal opportunities data. One example from the USA entitled the D-Metric allows organisations to compare different groups in their workforce with relevant labour market data to understand how representative their workforce is.<sup>48</sup> In considering how transferrable this is to other (for example, European) countries, it is again worth noting that US corporations face more stringent demands for reporting and will likely have better access to benchmarking data. Outside this context, where such granular data do not exist, tools like this may have less leverage and impact.

Another tool is the Lieberman index, which calculates the degree of difference in a given group, giving a measure of diversity across any demographic variable.<sup>49, 50</sup> The score ranges from 0 (everyone in the group has the same characteristics of interest) to 1 (everyone has different characteristics); thus, a score of 0.5 for gender would represent a 50/50 split of men and women in a team. This can be used to track progress or trends over time, although scores must be analysed in context: for example, changes in diversity in one area could be due to cohorts of workers leaving the business at retirement age, or certain job types being outsourced.

### How can employers increase disclosure?

Many employees prefer not to disclose personal data, especially that which relates to potentially sensitive information such as disability, sexual orientation or gender identity. So while increasing disclosure to get better quality data is vital for effective diversity strategies, it can be notoriously challenging.

*'Non-discrimination policies will encourage disclosure, but are unlikely to be effective on their own: one survey of LGBT+ employees suggests that broader trust in the organisation is also a necessary condition.'*

One survey of people with disabilities examines the barriers and enablers of disclosure.<sup>51</sup> In particular, it points to a fear that disclosure will stall one's career progression or concern about not being hired. Accommodation, reasonable adjustments and a supportive relationship with managers were rated as most important to promote disclosure, along with employers focusing on capability (what one can do) rather than disability (what one can't do).

Several studies examine factors related to disclosure of sexual orientation and gender identity.<sup>52, 53</sup> These suggest that non-discrimination policies will encourage disclosure, but are unlikely to be effective on their own: one survey of LGBT+ employees suggests that broader trust in the organisation is also a necessary condition.<sup>54</sup>

A meta-analysis of 24 studies on workplace sexual orientation disclosure supports this.<sup>55</sup> It identified several important factors for workplace disclosure of sexual orientation, including job satisfaction and supportive relationships with line managers. Overall, the largest influence on disclosure was organisational climate – that is to say, organisational norms that create a safe environment.

There is clearly a circular relationship here: good-quality data is needed to support D&I strategies, yet an inclusive culture will lead to greater disclosure and better data.

### **Investing in analytics capability**

Finally, employers may need to invest in analytic capability to make the most of D&I data. An international CIPD survey found that 53% of HR professionals considered that their HR functions had demonstrable numerical and statistical skills; this figure fell even lower to 36% when finance professionals were asked about their HR colleagues.<sup>56</sup>

### **Note on the body of research**

Overall, we find some scientific research on the quality and coverage of D&I data in UK organisations. In addition, there is limited evidence on the type of data that is most useful and should be prioritised. The body of empirical research on the factors that increase disclosure is more developed. This research mainly focuses on the LGBT+ and disability strands of diversity and uses cross-sectional survey data; as such it shows factors associated with increased disclosure but does not show cause and effect.

### **Practical insights into diversity data**

Our discussions with D&I professionals broadly aligned with the research evidence and provided additional insights on how employers can collect and use data.

### **Use existing organisational data**

Practitioners in our workshops commented that a good starting point is to mine existing organisation data to identify issues and monitor progress on diversity. For example, using employee progression data, broken down by demographic characteristics, can highlight bias in promotion and progression.

*‘Standalone D&I professionals, or those working in small HR teams, are often stretched for time and lack the resource to carry out extensive data analysis on diversity.’*

Nonetheless, a major challenge is that standalone D&I professionals, or those working in small HR teams, are often stretched for time and lack the resource to carry out extensive data analysis on diversity. Indeed, some practitioners found that data in HR systems were not up to date, compromising their ability to conduct analysis. Updating data regularly and ensuring that management information systems are compatible and do not clash should be priorities for employers. Technological improvements may help do this more efficiently, but there may still be resource implications.

### **Confidence in collecting and using data**

It seems that employers often lack confidence to collect data on many areas relating to diversity: they may think they can't ask certain questions, even though they can. Legislative and legal issues are often cited as a barrier to data collection, but conversations with D&I professionals suggested that constraints are often misperceptions rather than legal reality. While there are some limitations in the people data employers can collect, and this varies in different national contexts – for example, being more limited in France than in the UK – we found general agreement that employers should be aware of what is possible and make use of this opportunity.

Another reason employers can lack confidence in collecting and using D&I data is that they are unsure which classifications to use when collecting data, or the classification used may not be adequate. For example, when asking people to disclose disability, one suggestion was to expand the legal definition of disability and locate the question in non-work life. Employers can ask more openly whether there is anything employees need support with that has a 'long-term impact' on their 'day-to-day life', rather than on work activities.

This approach was viewed as emphasising that with the right supports in place, people with recognised disabilities are perfectly capable of carrying out their role well. In contrast, if employees feel that a long-term condition they have is managed well enough that it does not impact on their job role, they may not ‘tick a box’ in a cruder question on whether they have a disability.

### **Increasing disclosure**

D&I professionals in our workshops recognised that the quality of diversity data was crucial and low levels of disclosure a major problem. Various explanations and suggestions were given, each of which related to the trust that employees have in their employers.

A suggested starting point was explaining why the business needs certain data and how it will support diversity, so that employees can see how it will benefit themselves and colleagues. Where there is a clear business case, this should also be used. For example, age is a relevant characteristic in the Fire and Rescue Service because it relates closely to injuries, so better data on this can help the employer better support staff. It was also argued that, once diversity data has been analysed to inform people management decisions, employers should share what positive impacts have resulted.

Underlying this is the point that while it is tempting to gather ever more data in case one can find a later need for it, employers should not collect data for data’s sake. As a participant in our online forum put it:

*‘We should use what we collect and share the findings widely.’*

It is also important to explain how data won’t be used and how it will be protected. Employees need to be able to trust their employers that disclosing personal data will not harm their prospects in any way. If employees feel disclosing demographic information is risky, this should prompt organisations to reflect on their workplace practices.

### **Selecting data points and analysis**

Our online forum included discussion on what data points are most impactful for D&I strategies. A key one to emerge was comparing the workforce with the demographics of the local community to understand representation. As one participant put it:

*‘If you’re not matching your local community, you have some work to do.’*

A challenge highlighted in our workshops was getting intersectional data of strands of diversity. Most commonly, in both research and practice, we discuss individual aspects of diversity, but in reality we all have multiple, overlapping identities. For example, the experience of a black woman at work will differ from that of a black man, or a black disabled woman. Data analysis of race alone will not capture experience which relates to one individual’s disability status. Intersectional analysis is an important step to avoid oversimplifying barriers to workplace D&I.

Although participants shared some good examples of intersectional analysis of workforce diversity (especially from some large finance and professional services firms), practitioners noted that this was rarely if ever done. Groups such as BAME and LGBT+ are often considered only as single categories. This may be due to lack of data, as the numbers for representative or statistically significant analysis are simply too small. It can also be due to simplistic classification. Either way, analysing differences at such broad levels is likely to hide important differences for particular sub-groups. Where data allows, organisations can and should carry out more detailed analysis.

There is also often a need for typical diversity characteristics to be considered alongside other characteristics of employees. For example, a simple analysis of how employees of different ages fare in performance evaluations may tell us little in itself, as age is likely related to both tenure and seniority, which may also relate to performance. Thus, analysis of these outcomes by age should control at the same time for tenure and seniority. Similarly, when analysing pay gaps, employers should look at professional groups alongside gender, as some lines of work are likely to be gendered.

### **Data collection can't be a one-off exercise**

Considering how often to collect data is important, as employees' circumstances change over time. This is especially the case with workplace disabilities, which can start during employment, so is not picked up at recruitment, and may worsen or improve over time. Thus, data collection can't be a one-off exercise.

Data collection might also need to be done retrospectively. For example, the proportion of employees with dependent children is a highly relevant statistic, but employers may have limited data on this. Records of parental leave are insufficient, as they don't cover parents who had children before joining the company and this information may not be part of equal opportunities monitoring during recruitment.

### **Recommendations**

To make informed people management decisions, employers need robust workforce data: in particular, it should be representative and nuanced enough to give an accurate picture. High-quality people data helps employers design and target activity and monitor changes in diversity. Poor or non-existent data can be a serious barrier to progress.

*'High-quality people data helps employers design and target activity and monitor changes in diversity. Poor or non-existent data can be a serious barrier to progress.'*

### **Data collection process**

Employers can be confident in collecting data on workforce diversity but do need to take care in several key respects. In particular, employees' consent is generally needed to collect sensitive personal data (for example, on their sexual orientation, religious beliefs or health) and collected data must be protected in line with legal requirements.

To help improve the quality and usage of data, we also recommend that employers:

- Communicate to employees how and when the data will and will not be used.
- Select data points carefully and be clear with employees why it is being collected; what is the value of this data to them and the organisation as a whole?
- Consider what data categories are most appropriate, especially when asking employees to self-report in surveys (for example, what categories to describe sexual orientation or ethnicity – see data collection points below).
- Work with relevant networks – for example, groups representing or supporting BAME or LGBT+ employees – to communicate the importance of people data, encourage people to disclose their data and overcome barriers to disclosure.
- Make it simple for employees to share their data self-service systems, making use of HR systems and technology. For example, could they be prompted to share information when next logging into the HR system?



### Data collection points

Employers should aim to analyse reliable data by diversity characteristics from recruitment onwards. The following data points cover the employee lifecycle, although are not an exhaustive list:

- recruitment data at each stage of the recruitment process, including pools of applicants, shortlists and appointments
- pay and progression data, including data on performance feedback and appraisal, promotions, secondments and internal mobility
- data on leave and working patterns, including parental and adoptive leave data, returner data, uptake of flexible working, sickness absence
- conflict, including complaints, grievances and disciplinary data
- employee feedback data: survey data (such as staff engagement surveys), broken down by demographic characteristics
- exit data: retention/turnover and exit interview data.

It is worth reflecting critically on what data and analysis is needed to progress D&I in a given situation and how that can be collected. For example, management information systems and employee survey data can be analysed according to different strands of diversity; and surveys can also be used to directly measure people's perceptions of how inclusive the organisation is. This is discussed further in our report, *Building Inclusive Workplaces*.<sup>57</sup>

To support this, employers can draw on external support, tools and benchmarking (with a focus on upcoming ethnicity pay gap reporting in the UK). The UK Government has published an excellent benchmarking tool on gender pay gap data, which allows employers to easily search by industry and type of organisation.<sup>58</sup>

Survey questions should also be carefully designed. There may be a case for investing in research or subject expertise if guidance cannot be freely obtained from specialist bodies – for example, Stonewall advises on collecting data on sexual orientation and gender identity.<sup>59</sup>

### Analysis

We recommend the following general principles on analysing D&I data below:

- Consider your in-house people analytics capability and whether you need to develop this or bring in external resource.
- Make the best use of the data you have.
- Where data allows, take a granular approach to data analysis. For example, break down BAME employee data and LGBT+ employee data to understand barriers for specific groups, rather than aggregating data.
- Identify variables that could impact on the results of analysis and control for these – for example, does the seniority of older members of staff explain differences in staff satisfaction between age groups?

There are a number of aspects involved in people analytics. The CIPD has described nine steps, which can be applied to D&I metrics, outlined below:<sup>60, 61</sup>

- 1 **Plan:** Develop the goals and purpose for the analytics activity. Map the requirements of the customer and plan questions/queries that will be answered by the analytics process.
- 2 **Define critical success factors:** Define the measures that will show if the project has been a success. Examples of what these can be based on include: delivery on time, impact of project, feedback from users.
- 3 **Data audit:** Map the data that is currently available and grade its quality. This will illustrate where any gaps in data may be, which should be filled before progressing.

- 4 **Design the process:** Define roles and set objectives for team members. Define resource requirements and map stakeholders for the project.
- 5 **Design the data collection strategy:** Design the collection and processing stages of the analytics activity.
- 6 **Data collection:** Collect data from data sources. This can be from drawing on established data sets (for example, absence records) or running new data collection processes (for example, engagement survey).
- 7 **Analyse data:** Depending on the customer requirements, analyse the data and develop insights in the form of recommendations and guidance for the users of the data.
- 8 **Report data:** Report in a clear and simple way, illustrating a solution to their issue, or further areas of investigation if further data is required.
- 9 **Evaluate:** Review the data-analytics-insights process and evaluate impact. Review and update process as required.

Such analysis will enable more effective decisions within the organisation. Moreover, if published in collaboration with academics or other researchers, it will contribute to the wider body of knowledge for HR and D&I professionals.

## 6 Diversity training

### The issue

Our focus here is the effectiveness of diversity training programmes in signposting management commitment to creating a diverse and inclusive workplace, changing attitudes and, in turn, effecting behavioural change. We focused on two types of diversity training: unconscious bias training, which has become increasingly common over recent years; and learning interventions based on perspective-taking and sharing personal stories.

### Our research question

What is the research evidence on the outcomes of the following in driving D&I:

- 1 Diversity training, including unconscious bias training?
- 2 Perspective-taking and sharing personal stories?

### What's the evidence on diversity training?

#### Training interventions to reduce bias

**Unconscious bias training** (or UBT) involves teaching people about the psychological processes behind prejudice and why we are all biased, and techniques that can be used to reduce it. Assessments of people's prejudice, for example the implicit association test (IAT), are also sometimes used as a way of highlighting bias. UBT has become very common over recent years, not least because the McGregor-Smith Review recommended that the UK Government create a free, online unconscious bias training (UBT) resource to tackle the unconscious bias that she described as '*much more pervasive and more insidious than the overt racism that we associate with the 1970s*'.<sup>62</sup> However, its effectiveness has been questioned.<sup>63</sup>

**Perspective-taking** is an approach used in learning interventions or campaigns that involves getting people to reflect hard on what it might be like for other people facing prejudice or disadvantage.<sup>64</sup> This can be done by exercises in which people are asked to imagine being in certain scenarios, as other people, focusing on their emotions and interests. Similar approaches are used in awareness-raising and learning events through sharing stories and hearing first-hand the experiences of people who have faced

disadvantage and prejudice. Drama or documentary television programmes can also be used in this way. The perspective-taking approach is based on the idea that through ‘walking in someone else’s shoes’ to understand their viewpoint, one can lessen bias through contact between groups.<sup>65</sup>

It is worth noting that although often labelled as ‘unconscious’ in the context of diversity, bias is not always unconscious; people can recognise their bias and accept it as a reality. It is also worth noting that bias works in different directions, and reducing bias can thus require supporting different groups in different contexts. For example, men working in stereotypically ‘female’ roles can be disadvantaged in selection and promotion, similarly to women working in male-dominated roles. Similarly, fathers may face greater barriers than mothers in taking shared leave or taking up other ‘family-friendly’ policies.<sup>66</sup>

### **Impact on knowledge, attitudes and behaviour**

Research suggests that unconscious bias training can be effective in increasing people’s awareness and knowledge of diversity issues and of their own implicit bias.<sup>67, 68, 69</sup> This evidence is mostly based on self-report methods, which means the results may be subject to social desirability bias.<sup>70</sup> Nonetheless, it points to some impact on what is often considered the first step: developing knowledge.

However, evidence of attitude change as a result of diversity training is less conclusive, as found by a comprehensive review undertaken for the Equality and Human Rights Commission.<sup>71</sup> We can see these mixed findings looking across various studies. For example, while one study found that employees were more appreciative of the positive outcomes of gender equity following training,<sup>72</sup> another found that endorsement of explicit gender stereotypes was not reduced after UBT for men who previously held these attitudes.<sup>73</sup>

Following on from the unclear findings on attitudinal change, it is no surprise that impacts on behavioural change are hard to come by. There is extremely limited evidence to indicate that UBT is effective for behaviour change.

Moreover, while diversity training is often well received by participants and can have short-term results, it doesn’t usually show a sustained impact on behaviour and emotional prejudice, and alone is not sufficient to create a diverse and inclusive organisation. This is confirmed in a comprehensive meta-analysis of diversity training outcomes by Bezroková et al.<sup>74, 75</sup> It finds that diversity training such as UBT builds people’s knowledge about other groups and can affect people’s beliefs and behaviour, but these effects fade over time. Indeed, it suggests that learning at a later point tends to be minimal.

*‘One explanation for why bias training can backfire is moral licensing ... people feel virtuous having done the training and stop making the effort that is needed to keep their prejudices in check.’*

### **Why UBT might not work but perspective-taking might**

In her review of the research evidence on gender diversity, Iris Bohnet argues that one explanation for why bias training can backfire is *moral licensing*.<sup>76</sup> This is where people feel virtuous having done the training and stop making the effort that is needed to keep their prejudices in check. It is the same reason why putting people on a course of vitamins can paradoxically be bad for their health: they feel virtuous and stop exercising and eating healthily, factors that are far more important.

Based on a wide body of US research, Dobbin et al also argue that training backfires because it is didactic.<sup>77, 78</sup> As we discuss in section 4, their research shows that D&I practice works successfully by getting people on board, and prescriptive diversity training can easily get managers' backs up by making them feel less able to make their own decisions. They suggest that a better approach is to increase contact between groups so that people can experience working with them and gain a better understanding of their perspective.

Bohnet references various studies that show perspective-taking initiatives to reduce bias. These include writing an essay 'walking in the shoes' of an elderly person, focusing on the emotions of those facing racial discrimination and, in India, a reality TV programme that discussed caste inequalities.

### **What makes a difference**

The CIPD's previous review on D&I found that, as with other learning interventions in general, diversity training can be effective in promoting knowledge and skills when certain conditions are met.<sup>79</sup> These include:

- Training takes place over multiple sessions.
- Both awareness and skills are part of the training content; for example, when it increases knowledge of different cultures as well as diversity awareness, and includes a blend of social interaction, active instructions and distributed learning.
- It is tailored, not one-size-fits-all. A study on disability diversity training<sup>80</sup> found limited evidence for its effectiveness overall, yet provided evidence that training must take into account participant needs and information.
- It is integrated with wider organisation initiatives to be effective.

The Bezroková et al<sup>81</sup> systematic review finds that diversity training is more effective if it not only builds awareness about biases, but also develops people's interpersonal skills in a way that reduces bias. It also suggests that training interventions must not be isolated activities, but instead integrated with other diversity-related initiatives into broad cohesive programmes.

*'Training interventions must not be isolated activities, but instead integrated with other diversity-related initiatives into broad cohesive programmes.'*

### **Note on the body of research**

There is a sizable body of research on the impacts of diversity training. Much of this focuses on self-reported and short-term impacts – the methods for evaluating such change have low validity, in that they fail to measure actual observed change.<sup>82</sup> Nonetheless, this is still one of the better-evidenced areas of D&I practices.

### **Recommendations**

#### **Training as an obligation**

D&I professionals in our workshops quickly pointed out that, even if training is ineffective, it needs to be done from a liability standpoint, so that the organisation can protect itself by demonstrating its efforts in the case of legal action.

Further, in contrast to the view of diversity training backfiring because it is prescriptive, some argued that training is a language that staff understand, especially in highly regulated industries where people are more likely to want clear instructions on what to do. It was also noted that D&I themes could be built in to other training – for example on technical issues – to make it feel more integrated to employee development.

### **Dangers of 'sheep dip' training**

However, problems were recognised with an approach of meeting fixed requirements, such that training is demonstrated to have been conducted with all employees and to have covered all of the relevant messages or learning points. This was seen to motivate a 'sheep dip' approach to training – quick and cursory, done once for reasons of compliance and not genuinely expecting a 'return' in behaviour outcomes. Such an approach may be seen as window dressing and may not stand up in court.

The short-term effects of training were recognised both in our workshops and our online forum. Participants argued that training can be effective to keep the subject of bias fresh in people's mind, but that this requires repetition.

It was also argued to be vital that senior managers set the tone by showing to the rest of the organisation that they take the training interventions seriously. This was seen to work well by targeting training at senior managers first as well as getting them to openly promote them.

### **Unconscious bias training**

Workshop attendees had varying views on unconscious bias training: some very positive, some sceptical and some clearly negative. Many of these views were drawn from their own experiences, and it is important to note that the views to unconscious bias training of those attending our workshops were not representative of managers in general. It seems likely that D&I specialists will be more interested in understanding the mechanics of psychological bias and more influenced by training on this as a result.

### **Perspective-taking**

One example given was of using augmented reality technology so staff could 'walk in the shoes' of someone with a visual impairment. This was seen as a very powerful learning exercise, but it was acknowledged that in-depth learning activity like this may be complex for other strands of diversity and too resource-intensive to do for all employees.

### **Evaluation**

The importance of continually assessing training was highlighted, not only to understand what works and how it can be improved, but also to increase buy-in, so that the purpose and benefits of training are understood by the wider organisation.

### **How can we improve diversity training?**

Even if D&I training is conducted as an obligation for reasons of liability, employers should take the opportunity to make them as effective as possible.

### **Linking training with other activity**

Yet in recognising its limitations, employers should view training as part of a wider programme, not as a magic bullet that will change behaviour by itself. This seems especially the case when considering the impact of raising awareness of unconscious bias, which will not lead to long-term positive change on its own.

Learning and development sessions also need effective communications support if they are to be taken seriously. Senior managers should position D&I as an important strategic issue and communicate the importance of the training interventions.

### **D&I training should align with the principles of good L&D practice**

Diversity training interventions should make use of wider insights into effective learning and development (L&D). Key points include:

- Learning and development on diversity needs to be ongoing, not a cursory one-off exercise (the ‘sheep dip’ approach to training).
- Rely on different delivery methods appropriate to the learning outcomes; these may include a mixture of online learning, face-to-face training workshops and in-depth experiential learning.
- Consider how the training can be made relevant to each individual and their job role.
- Continually evaluate the effectiveness of diversity and awareness training. This begins with outlining clear aims and before-and-after measures to assess changes – for example, in raising awareness. Creating an intervention and control group will help measure the effectiveness of the training intervention. And each intervention should be evaluated to establish whether it has been effective in meeting its intended aims.

### **Embedding perspective-taking and awareness-raising into training**

We recommend that learning and development on D&I prioritises a focus on perspective-taking, rather than those that explain psychological processes of unconscious bias. This seems likely to generate more buy-in for (and less resistance to) D&I and have greater effects on behaviour change.

If training does inform employees about unconscious biases, an important point of detail is that learning materials must in no way suggest that stereotypes and psychological biases are unchangeable. This has been shown to lead to training backfiring, by making people feel comfortable with prejudice, leading to an increase in bias.

## **7 Person ‘fit’ versus diversity**

### **The issue**

Decisions on selection and promotion are a major issue in promoting workforce diversity. A central aspect of this is the assessment criteria that set parameters and guide decisions. We focus in particular on the notion of how well candidates fit the job, team or organisation. While the criteria of ‘fit’ is well embedded in the recruitment literature, we explore the potential contradiction between recruiting and promoting people for person–team or person–organisation fit, while also ensuring talent management practices are inclusive and promoting diversity.

### **Our research question**

What does the research evidence tell us about:

- 1 The extent of a tension between recruiting and promoting people for person–team or person–organisation fit and ensuring talent management practices are inclusive?
- 2 How can employers best balance or manage this tension?

### **What’s the evidence on person ‘fit’?**

The recruitment literature generally accepts fit as an effective way to assess job applicants’ suitability for a role. Thus, when fit is mentioned in relation to diversity, it is often in the vein of helping diverse groups of people fit in better, or experience feelings of fit.<sup>83</sup> However, one can challenge this narrative on the basis that fit may essentially mean conforming, rather than being genuinely inclusive. If we follow core principles of D&I, employers should aim to make their organisations less exclusive rather than pressuring minority groups to fit.

**Box 1: What is 'fit'?**

**Person-organisation (P-O) fit** is described in terms of how well a person's perceptions of the values held by a company map on to the values that the person holds themselves.<sup>84</sup> This focus on the congruence of norms and values is distinct from aspects more typically considered under diversity (gender, ethnicity, and so on) but may be closely related. As such, an explicit focus on P-O fit may have an indirect negative impact on diversity, via unconscious bias.

**Person-job (P-J) fit** typically refers to the match between a person's abilities and personality, and a job's demands and what it offers. This too can get in the way of diversity if a profession is associated with certain characteristics – for example, stereotypes of surgeons or pilots being men, or professional service employees being middle/upper class. P-O fit is emphasised more for permanent positions and P-J fit more for temporary ones.<sup>85</sup>

**Complementary fit** is where a person brings new viewpoints and skills to an organisation – that is to say, when *'the weaknesses or needs of the environment are offset by the strength of the individual, and vice-versa'*.<sup>86</sup> In other words, complementary fit can *'mean that an employee has a skill set that an organization requires, or it can mean that an organization offers the rewards that an individual wants.'*<sup>87</sup>

**Supplementary fit** is where a person has similar attributes to an existing group.<sup>88, 89</sup> It can occur when employers hire people with skills that replicate those already in the workforce. However, the focus of supplementary fit is often on value congruence between employees and organisations rather than capability – for example, whether an employee and an organisation similarly place more importance on autonomy or teamwork, or on frank feedback or group harmony.

**Benefits and risks of emphasising fit**

Person-organisation fit and person-job fit are established predictors of performance,<sup>90</sup> turnover<sup>91</sup> and other employee outcomes such as commitment.<sup>92</sup> Thus, many explicitly argue for P-O fit in recruitment.

The danger is that an employer's focus on person-organisation fit can undermine diversity, especially if 'fit' is understood as being similar to the rest of the team. Employers selecting only people who seem like themselves or their colleagues will put people of a different race, gender, ethnicity or socioeconomic status at a disadvantage. This has implications not only for fairness but also for long-term business needs such as innovation and organisational responsiveness to market changes.<sup>93</sup>

A study of employment tribunal transcripts found that disabled job applicants may not fit job specifications due to the way work is organised.<sup>94</sup> Barriers can also exist at a more cultural level – for example, universities are argued to be gendered environments that can be difficult for women.<sup>95</sup> To get a full picture, we need to consider intersectionality – for example, age, gender and industry can interact to complicate notions of who fits.<sup>96</sup> The work of Ashley is a good example of this.<sup>97</sup> She explores diversity management in UK law firms, with a focus on socioeconomic diversity in law firms – who 'fits' the role of being a lawyer and the firm culture. Her research sheds light on the negative impact of judgements for 'cultural fit', and the potential this has to legitimise discrimination.

### **How ‘fit’ occurs, and how it can compromise diversity**

Recruiting for person fit can obviously be a deliberate strategy. Literature from the 1980s on the role that ‘suitability’ plays in discrimination argues that employers may use this principle to maintain compliance and organisational control. Essentially this amounts to a search for *‘the settled, habituated worker who will be at his or her machine or desk as and when he or she is required to be’* leading to a *‘stable habituated workforce which will present no supervisory problems’*.<sup>98</sup>

Selecting for fit can occur unconsciously. ‘Affinity bias’ leads people to like those who are similar to them or someone they know; related to this, the ‘exposure effect’ means individuals like things they have been exposed to; and ‘status quo bias’ may cause employers to feel more comfortable looking for candidates who are similar to candidates they have hired before. Finally, the ‘endowment effect’ may lead managers to value skills and characteristics of current staff disproportionately, potentially blinding them to the benefits of candidates whose capabilities fill a current gap.

Additionally, an organisation is defined by the people in it and thus, over time, by which people leave and join it. This is labelled the attraction–selection–attrition (ASA) cycle: as well as being selected or made redundant by management, people select themselves into and out of organisations.<sup>99</sup> There is indirect and direct evidence to support ASA theory, showing organisations become more homogenous.

Notions of ‘fit’ also develop at industry levels. Further research by Louise Ashley shows that some elite professional service firms *‘privilege candidates with the same narrow forms of cultural capital’* even though the employers recognise *‘that this contradicts their professed commitment to social inclusion and recruiting the best “talent”’*.<sup>100</sup> An explanation for this is that in situations when the quality of services one receives is ambiguous or hard to assess (for example, professional services), people view social class as an indicator of credibility, reliability and thus service quality.

### **How is ‘fit’ assessed?**

Fit can be assessed subjectively. There is a particular problem in this as assessing fit can become a subconscious process fraught with bias.

There are a number of commercially available psychometric measures of fit that are more objective. These vary in their focus: fit might be measured as fit with organisational values, others in the organisation, what skills and ability the organisation is looking for, and so on. One study argues that because these different factors have never been measured in a single study, *‘the accuracy of this framework is debatable’*.<sup>101</sup>

### **Managing or challenging ‘fit’**

We find less scientific literature on how employers can manage the tension between fit and diversity in recruitment, but there are nonetheless some pointers from the wider literature.

*‘One potential approach is to recruit for “anti-fit”, that is, to target people who might meet all the requirements needed to perform the job well but may not fit with some aspects of the existing culture.’*

One potential approach is to recruit for ‘anti-fit’, that is, to target people who might meet all the requirements needed to perform the job well but may not fit with some aspects of the existing culture. An account of Google from Head of People Operations



Laszlo Bock explains that it challenged its own selection criteria by occasionally hiring someone who doesn't fit (that is, someone who didn't meet some of the recruitment criteria) and measuring the impact.<sup>102</sup>

Certainly employers can challenge assumptions about fit. In a previous CIPD research review, *A Head for Hiring*,<sup>103</sup> we argued that employers would do well to take a fresh look at person-organisation fit, considering not only the current organisational culture but also that to which it aspired. Our advice was to explicitly list employee characteristics that the organisation needs and commit to focusing on these characteristics in selecting candidates. Within this, employers can consider some degree of 'anti-fit'. Analysis of current organisational culture may be used to identify certain departments or job roles that are particularly homogenous and would benefit from this.

Google also introduced a rule that managers could not interview for their own team in order to reduce managerial bias in recruitment.<sup>104</sup> This loss of control was not popular with many managers but intended to signify a commitment to reducing bias and hiring the best possible talent across the firm. While a bold move, it is in line with research that points to the huge amount of bias that is likely in recruitment decisions, especially when they are made through unstructured face-to-face interviews.<sup>105</sup>

Taking such approaches will need dedication and a willingness to challenge the status quo. The case for doing so may be bolstered by focusing on *complementary fit*, that is, looking for people with unique skills or traits who bring something different to the organisation.

#### **Note on the body of research**

There is a large body of literature on how people fit with their role, team or organisation and what impact this seems to have. This is usually in relation to team or business performance, with some reference to well-being and other individual outcomes, but little in relation to diversity and inclusion outcomes.

#### **Practical insights into person 'fit'**

The D&I professionals in our workshops agreed that recruiting for fit could be very damaging to diversity. This not only happens in the short term through the direct results of recruitment, but also in the longer term. In line with the ASA cycle (above), an inclusive culture was seen as necessary for diverse recruitment to have a long-term impact: one can bring in a more diverse cohort of employees, but many of those people will leave the organisation if they feel they don't fit.

A focus on fit with organisational values was seen as acceptable, or even necessary, in the recruitment process, and compatible with diversity. One participant from our online forum wrote:

*'If an organisation has the right culture, it should attract a diverse workforce. It should be suitable for a wide range of people from different backgrounds, walks of life, ethnicity, religions, etc.'*

However, we also heard broad agreement in our workshops that values could be closely related to demographic groups and care thus needed to be taken in recruiting for values. Overall, the practitioner insight was that 'fit' should be narrowly focused on a limited set of values, and that employers should challenge a focus on values that effectively covers up for non-inclusive recruitment decisions.

Following from this, another important consideration is how to select values that do not discriminate unfairly and reflect what the organisation actually needs. Values thus need

to be stress-tested for bias. For example, certain values such as assertiveness (male) or compassion (female) can be highly gendered in their associations; certain professions can in themselves be associated with a certain gender or demographic group; and in social class, assumptions are made about people's intelligence or articulateness based on the strength of regional accents.

There was also appreciation for the notions of complementary fit and, to a lesser extent, anti-fit. Overall, there was some sense that the value of fit was often misunderstood. Practitioners felt that being a good fit does not have to mean recruiting someone who is like those already in the organisation and bringing in someone who will challenge, innovate and help the team grow may be more important.

### **Recommendations**

In accordance with legislation, only in exceptional circumstances should protected characteristics be listed as requirements of a job and this must be fully justified – for example, some services to female victims of domestic abuse may specify women-only candidates.

The notion of 'fit' is valid in principle, but it is very easy for it to allow unconscious bias to creep in, or even to become a blatant cover for overt prejudice. Unwritten assumptions about suitability can include appearance, demeanour or social background, and can be hugely limiting, as these characteristics can be strongly related to minority or disadvantaged groups (that is, they are gendered, racialised or class-based, and so on). They can also be hard to identify and unlikely to surface in a normal job description – pernicious stereotypes and unconscious bias can work in very subtle ways.

### **De-biasing job specifications**

HR professionals should make a concerted effort to weed out bias from notions of who suits a role, team or organisation. One way to do this is to stress-test job descriptions for D&I. The language used in job specifications is crucial, and even if it is not drawn up hastily, can easily reflect bias. Equally, hiring managers should be aware of any limiting assumptions they have about who will suit a role and should be coached to put these firmly to one side.

We outline a potential approach in Box 2. For many jobs, this may be too resource-intensive to be practicable, especially where there is pressure to fill posts quickly. In addition, HR professionals may need to take care in recording information that potentially implies managerial prejudice, to protect against litigation.

Notwithstanding such considerations, we would argue that a major barrier to diversity is unwritten assumptions about who will suit job roles. Making these assumptions explicit and challenging them where they are biased and not relevant to the job is thus an important step in D&I and should not automatically be trumped by short-term concerns. The managerial need to fill posts quickly is very real but shouldn't deter a more progressive approach to selection.

### **Hiring for complementary fit**

Employers would also do well to focus on *complementary* fit – that is, the unique and complementary capabilities and attributes that a candidate should bring to a role – rather than *supplementary* fit (the candidate offers more of what a team already has). An even more ambitious approach would be to explicitly target different characteristics in candidates, deliberately recruiting for 'anti-fit'.

### Box 2: A potential approach to balancing ‘fit’ and diversity in job specifications

HR professionals should be prepared to dig deep to de-bias job specifications and the murkier area of unwritten assumptions about job roles. A potential approach to doing this is outlined below:

- 1 Hiring managers write down the person specification in detail: what is the role that is needed, including duties to fulfil and skills and knowledge needed?
- 2 Building on this, the manager writes a description of how they envisage an ideal candidate, including examples of previous outstanding performers in the role and noting what made them so good. They might also note these individuals’ personal characteristics, such as their ethnicity, gender or socioeconomic background (class).
- 3 The manager and an HR professional with D&I expertise review the profile together to:
  - Consider whether the person specification and ideal candidate description have implicit associations that may discourage candidates with certain characteristics, and/or disadvantage them in the selection process (that is, the description is gendered, racialised or class-related, or has implications for other strands of diversity). Language ‘decoders’ may be helpful in this.<sup>106</sup>
  - Decide which characteristics should be baked in to the person specification and which should be jettisoned as irrelevant or inappropriate on the grounds of D&I. Because of the pervasiveness of unconscious bias, we suggest there is no middle ground here – characteristics that threaten to compromise workforce diversity should not be downgraded from ‘essential’ to ‘desirable’, but changed or removed.
- 4 The person specification is then drawn up based on the relevant and acceptable characteristics. In some cases, it may be useful to add statements for internal use that counter the jettisoned characteristics – for example, ‘We welcome applicants of all ages for this role’ – to make any implicit assumptions about them explicit and make it easier to put them aside as invalid.

## 8 Positive action on diversity

### The issue

In the last section we considered the tension between person ‘fit’ and diversity in selection decisions. Following this, we consider the effectiveness of positive and affirmative action approaches in selection and progression. We distinguish between positive action, affirmative action and positive discrimination (illegal in the UK) as follows:

- **Positive action:** A wide range of activity taken by employers to actively promote diversity and minimise disadvantage for particular groups, permitted under the Equality Act 2010. Positive action includes forms of support for underrepresented or disadvantaged groups (for example, BAME or women’s networks), but it also includes approaches to making decisions on recruitment and promotion. For example, employers may use targeted job adverts or apply the ‘tie breaker’ principle in selection decisions, by which they select from ‘equal’ candidates (or candidates who equally meet the essential job criteria) based on which is from an underrepresented group. Positive action is a term used largely in the UK, but also applies to other contexts.

- **Affirmative action:** Policies that support groups previously subject to disadvantage and discrimination, largely a term used in the USA.
- **Positive discrimination:** Preferential treatment to a group based on a demographic characteristic.

We consider evidence on the effectiveness of various positive action practices and strategies, including targeted recruitment campaigns and diverse shortlists, as well as mentoring, coaching and sponsorship for underrepresented groups.

### **Our research questions**

What does the research evidence tell us about the effectiveness of, and attitudes towards, positive action approaches, in particular:

- Targeted recruitment campaigns or other recruitment activities such as ‘diverse’ shortlists?
- Targeted support, such as mentoring, coaching and/or sponsorship?

The research evidence indicates that positive and affirmative action receive mixed support from managers and other employees, so we also consider the potential for resistance and how to mitigate this. This is especially important when we consider the role of line managers, who frequently make selection and promotion decisions.

### **What’s the evidence on positive action?**

#### **Attitudes and approaches to positive and affirmative action**

A typical approach by UK employers is to embrace positive action in order to present candidates with a ‘level playing field’ by identifying and removing barriers and issues to the recruitment, retention and progression of people from ‘underrepresented’ groups, yet still employing people on merit or experience.<sup>107</sup> We discuss the evidence on attitudes towards positive and affirmative action approaches below.

One study on the UK National Health Service presents historical data showing that 73% of respondents supported a positive action approach and 93% supported an ‘equal opportunities’ approach.<sup>108</sup> However, the research identified sceptics about whether equal opportunities commitment leads to change in practice. The author comments that *‘positive action has barely made any impact at all’*,<sup>109</sup> because it’s not embedded in strategy and can’t fully address the complexity of inequality.

Another study compared perceptions of positive action in the UK and affirmative action in the USA.<sup>110</sup> In the UK, participants largely understood positive action as a tool to create equality in the workplace, and felt it was an effective tool if carefully planned. In addition, respondents suggested that, ultimately, organisational cultures also need to change, and positive action should be a temporary way to address imbalances that would no longer be needed when *‘a level playing field had been achieved’*.<sup>111</sup> However, UK respondents struggled to articulate whether positive action approaches have been successful, in part due to lack of workforce data to evaluate the outcomes.

In the USA, the study found that affirmative action was largely understood as redressing inequality, but negative media coverage leads to the perception that affirmative action is akin to preferential treatment. Practices such as the use of quotas (which in the UK would be labelled as positive discrimination, rather than positive action) are more widely criticised.

A particular criticism of affirmative action schemes is that it can lead to negative perceptions of those hired and even impact the individuals’ own view of their competence or status. One US study confirms the stigmatising effects of affirmative action, showing that minority candidates received worse performance evaluations than average if they were hired under affirmative action.<sup>112</sup>

However, other studies identify that affirmative action receives support from employees in some circumstances, at least in principle. One study found that senior public sector managers supported the proposal of gender-based affirmative action, although they were less supportive of the way it was implemented in practice.<sup>113</sup> Further, a study of US students showed more favourable assessment of university affirmative action programmes than less assertive diversity management programmes, on the grounds that affirmative action was more likely to have an impact and actually draw a diverse set of candidates.<sup>114</sup>

Finally, one recent study examines the so-called tension between affirmative action approaches and merit.<sup>115</sup> It finds that although managers largely accept that unconscious bias impacts on the objectivity of 'merit', they feel affirmative action violates the principles of merit. The authors thus argue that educating managers about implicit bias *'should be coupled with a critical reassessment of merit'*, as well as reconfiguring key HR practices.

### **Managing backlash from positive and affirmative action**

Attitudes towards affirmative action are likely to vary based on the 'strength' of the approach – the strongest being quotas and preference-based actions that are akin to positive discrimination, illegal in most national contexts.<sup>116</sup> They are also affected by employees' personal beliefs on why affirmative action programmes are implemented – in essence, whether they believe discrimination is an issue, and whether affirmative action is a legitimate way to tackle this.<sup>117</sup>

One survey-based study suggests that negative reactions to affirmative action often occur because they appear to be giving 'preferential treatment', which appears inconsistent with equality ideals.<sup>118</sup> However, the study provides evidence that people who tend to see 'the bigger picture' are less likely to react negatively to the apparent inconsistency in affirmative action policies. The authors therefore suggest preparing managers to think differently about the apparent inconsistency between fairness and targeted approaches.

*'People who tend to see 'the bigger picture' are less likely to react negatively to the apparent inconsistency in affirmative action policies.'*

Other research suggests that different justification of affirmative action affects its perceived acceptability.<sup>119</sup> When explained as a way to hire and promote people from minority groups to better serve the customer base, it is seen more favourably than when it is described as a way to meet equal opportunity guidelines. This difference was amplified when the 'majority' group felt they were being disadvantaged as a result of affirmative action. Similarly, a study of white US undergraduates found that tiebreaker policies received little support when presented without justification but received more support when the policies were justified in terms of increasing organisational diversity.<sup>120</sup>

Clearly, employers need to clearly communicate why any affirmative action approach is being implemented and, in particular, avoid giving the impression that affirmative action gives unfair advantage to certain groups.<sup>121</sup> The same can be said of positive action or general diversity management approaches.

However, framing D&I initiatives positively can be complex and should not necessarily be done uniformly. A study shows that different groups vary in how accepting they are of diversity and D&I initiatives.<sup>122</sup> For example, individuals' gender and personality traits can affect how sensitive to and supportive of diversity they are.

### **Involve managers, give them space and hold them accountable**

One study argues that managers may support diversity initiatives more than employees without line management responsibility, because they have greater opportunity to support diversity.<sup>123</sup> In other words, if managers feel like they have control over diversity outcomes, they are more likely to act. This aligns with research discussed in sections 4 and 6 on gaining buy-in and diversity training.

Indeed, the research previously cited by Dobbin and colleagues gives us insights into the organisational conditions that make a difference to positive action programmes.<sup>124, 125</sup> Drawing on cognitive dissonance and self-perception theory, they argue that, by engaging managers in leading change, organisations can increase managers' support of that change:

- Reforms that engage managers in recruiting and training women and minorities for management posts are more successful in promoting diversity.
- Initiatives designed to control managers – reducing managerial discretion in hiring and promotion job tests, performance evaluations, and grievance procedures – can lead to resistance and tend to backfire.
- Discretion-control and transparency reforms are more effective when managers are monitored and held accountable to diversity managers or federal regulators, as they become more attentive to the effects of reforms.

They also argue that reforms that increase hiring and promotion transparency – for example in job postings and job ladders – advance diversity by expanding the applicant pool.

### **Limitations of affirmative action**

Underrepresented groups may benefit from affirmative action programmes in initially gaining access to jobs in the first place, but they can remain excluded from information networks in organisations. On this basis, some have argued that they should be complemented by other initiatives aimed at fostering inclusive work environments – for example, strong mentoring processes, feedback loops through focus groups and awareness-raising workshops.<sup>126</sup>

### **Coach, mentor ... or sponsor?**

We find little research in the scientific literature on the diversity impacts of initiatives based on supporting and developing individuals to progress, such as coaching, mentoring and sponsoring.

#### **Box 3: What's the difference between coaching, mentoring and sponsorship?**

- **Coaching** is a form of non-directive learning that can be led by any suitably skilled consultant or colleague who need not be speaking from a position of seniority. There are various models that can frame coaching conversations, such as CIGAR (focusing people on their Current versus Ideal situations, the Gaps, Action they will take, and how they will Review progress) or GROW (Goal, Reality, Opportunities and Way forward). These are designed to pose powerful questions that get coachees to reflect on their situations to learn and find sustainable solutions to real-life challenges.
- **Mentoring** is typically done by a senior manager. It is also in essence a form of non-directive learning, but a mentor will typically give more advice alongside this. In practice, coaches may sometimes shift into mentoring within a meeting and mentors will often use coaching techniques.

- **‘Reverse’ mentoring** involves more junior colleagues sharing their experiences with more senior colleagues to enhance knowledge and skill-sharing throughout an organisation.
- **Sponsorship**, also conducted by more senior-level managers, involves mentoring but also actively advocating selected employees and channelling opportunities their way. Thus as well as a tool for learning, it involves senior managers giving their ‘protégés’ preferential treatment and influencing decisions to advance their careers.

In her book on gender equality interventions, Iris Bohnet advocates not just mentoring but more active sponsorship to help women progress their careers.<sup>127</sup> Her main argument is that sponsorship is a fact of organisational life anyway, whether as a formal or (more normally) informal arrangement, and benefits dominant groups (especially white men). As such, she sees allocating women sponsors and helping them to become better at seeking out and approaching potential sponsors as a necessary way to address this inequality and level the playing field.

However, there would appear to be serious risks using sponsorship as a D&I solution. First, compared with coaching, mentoring or more open talent development programmes, it may hamper inclusion by justifying and perpetuating a climate based on exclusive relationships. As discussed in section 7, there is good research to show that inequality develops and is reinforced through subtle means, for example with decisions about who is suitable for selection or promotion based on highly subjective judgements.<sup>128, 129</sup> Sponsoring relationships are typically shaped by who senior managers have an instinctive affinity with; this introduces huge potential for bias and should arguably be strongly discouraged.

Second, legitimising sponsorship relationships may reinforce a fixed mindset of talent, in that once a protégé is selected, the sponsor advocates them, to some extent irrespective of their ongoing performance and partially blinded to other people’s growing talent. This may undermine an organisation’s commitment to fairness and thus diversity.

A counterargument in support of sponsorship is that it is such a strongly embedded feature of organisational life that it is here to stay; in effect, *if you can’t beat them, join them*. But using the same methods that create inequality in the first place is arguably more a case of *fighting fire with fire*. More research is needed on this practice, but by legitimising favouritism, sponsorship appears inherently out of sync with inclusive organisational climates. Encouraging sponsor–protégé relationships reinforces the influence of biased forms of social capital and exclusive professional networks and runs a risk of perpetuating a major source of bias, rather than redressing it.

*‘Encouraging sponsor–protégé relationships runs a risk of perpetuating a major source of bias, rather than redressing it.’*

Finally, we find some research on reverse mentoring. This is not conclusive but points to potential benefits in diversity, in particular across age groups.<sup>130</sup>

#### **Note on the body of research**

There is a variety of cross-sectional research on subjective attitudes towards affirmative action in a US setting, and survey data on perceptions of positive action approaches more broadly. However, there’s less objective data on the effectiveness of positive action in the UK, and which factors support its success, which may in part be due to lack of evaluation of such strategies.

## Practical insights into positive action

### Role of people managers

The D&I professionals in our workshops clearly saw people managers as having a pivotal role in making positive action effective. Some focused on empowering middle managers to champion D&I, arguing that they have to be engaged so that D&I strategies can get off the ground and deliver. They saw that managers needed to understand the benefits for this to happen but acknowledged that this is difficult if D&I isn't seen by people managers as an intrinsic part of their job.

How to manage this issue was a key discussion in practitioner workshops. A number of practitioners highlighted that fostering D&I in the team should be pushed as a non-negotiable part of people management, from when they are recruited, through to their performance reviews. Some went even further, suggesting that if people aren't aligning to D&I values, they should not be managing people in your organisation.

However, others noted that in organisations with staffing pressures, such a hard-line approach isn't realistic, and that while challenging behaviour is sometimes necessary, HR professionals should be focused on supporting managers and making D&I relevant to them. One participant shared an example of this in practice: this used a diversity 'dashboard', populated with organisational data, to aid decision-making, highlight where issues lie, create accountability and a sense of comparison between other organisations' teams.

### Mixed views on targeted recruitment

Targeted recruitment strategies for workforce diversity generally received strong support in our workshops and online forum. In general, participants felt that by casting a wider net, these should increase diversity, provided this were part of a wider strategy based on organisational data regarding representation.

Practically, however, we heard some views that D&I is not always a priority in recruitment. One participant in our online forum explained that:

*'A successful recruitment campaign is judged on the time it takes to hire the right skills, experience and competencies. D&I considerations are, I'm afraid to say, much further down the list.'*

Some participants in our online forum also noted that using these approaches in recruitment can't solve wider societal issues, and that organisations risk creating resentment between groups, if employees feel a tokenistic approach has been taken. This tallies with some of the employee views uncovered in the research discussed above.

### Mixed views on targeted development

We also asked respondents for their views on specific coaching and mentoring initiatives as part of D&I strategies. There were again mixed views on these sorts of approaches, with some participants thinking that targeted activity was important to overcome barriers to development, so long as programmes were embedded in wider strategy.

On the other hand, some forum participants felt that targeted programmes can be inappropriate, as they create a sense of exclusion for those not involved. For example, one commented: *'Surely it is best to not discriminate but provide opportunities for everyone to participate in development opportunities.'*

Practitioners in our workshop acknowledged that there can be a misconception about what positive action entails and how it differs from positive discrimination. They argued that employers need to clearly communicate the rationale behind any approach.



### **Coach, mentor ... but not sponsor**

D&I professionals in our workshops showed strong support for coaching and mentoring but very mixed views on whether sponsorship was appropriate or ultimately effective for promoting diversity. Some had very positive views, which seemed in part to stem from personal experiences of it benefitting themselves or colleagues from minority groups. But more participants felt that sponsoring tends to involve supporting someone you see who is like you and, as such, maintains the status quo by supporting the advancement of those who 'fit' a mould. This confirms the concerns about sponsor-protégé relationships that we outline above.

Our conversations also confirmed that in many organisations, informal if not formal sponsorship is culturally embedded and a key to progression – we even heard an example of senior managers arguing that potential candidates should not be promoted as they lacked a 'senior-level sponsor'. Targeting sponsorship at minority or disadvantaged groups was not felt to adequately deal with the concerns about sponsor-protégé relationships, namely that it is fundamentally an exclusive arrangement. Thus, while there was some disagreement, the dominant view was that sponsorship was anathema to D&I and an approach that should be challenged.

However, coaching and mentoring were seen in a very different light. Dedicated mentoring programmes for minority or disadvantaged groups were also perceived negatively in some contexts. A particular example concerned women's support networks in the military, which were seen to be unappealing to the female employees they targeted, who often wanted the development support but not to attend events specifically for them. It could give rise to stigmatising banter from male colleagues about 'going off to your knitting group'.

A preferred alternative, both in the military context and others, was to ensure that coaching and mentoring arrangements are open to all, do not have a partisan influence on progression, and are emphasised in place of sponsor-protégé relationships. This view extended to development events, which were viewed much more positively if they were seen as being open to all.

Finally, for very different reasons, reverse mentoring was suggested as a positive way to get senior managers more involved in D&I. Pairing senior managers with junior staff from minority groups was seen as an approach that both develops the leadership skills of the junior colleague and raises senior managers' awareness of the challenges and experiences faced by minority groups. This in turn could build senior buy-in and advocacy for D&I, although participants acknowledged that support needs to be in place for mentors and mentees.

### **Recommendations**

Positive action programmes should form a central part of any D&I strategy. We consider both forms based on targets in recruitment and promotion decisions and the use of support networks and learning and development.

#### **Targeted recruitment and progression**

Employers can be assertive in their use of targets in recruitment without falling foul of legislation prohibiting positive discrimination. Based on current evidence, we recommend that they should:

- Have a clear rationale and targets for positive action, informed by robust organisational data (see section 6).

- Consider how any strategy links to other organisational practices. If a positive action approach is taken in recruitment for people with disabilities, for example, how does the organisational environment need to change to be inclusive?
- Examine organisational and departmental objectives and ensure that they at least complement and, if possible, incorporate diversity targets.
- Diversity targets should be set at a high level, allowing flexibility in how managers contribute towards them.

### **Communicating the rationale for positive action**

Positive action can be derailed by misconceptions and resistance from employees (especially managers). To tackle this, we recommend that employers put resource and effort into carefully positioning the aims and outcomes of any positive action. Communications should emphasise why the approach is being used, how it is of benefit to employees and the organisation, and, crucially, what positive action is and isn't.

### **Empower, support and hold to account**

As well as careful communications on positive action, we recommend that employers aim to empower managers where possible within positive action practices, giving them choice and decision-making power within a D&I framework. We believe this is important to emphasise that, in their role as people managers, they are influential actors in helping the organisation create an inclusive working environment and meet D&I objectives:

- Emphasise managers' influence and agency in driving diversity and communicate how this is relevant for their role.
- Set diversity targets jointly with people managers, or do so in a way that provides flexibility.
- Hold managers accountable for their progress towards organisational D&I objectives.

Further, we recommend that diversity targets are not cancelled out if and when they collide with operational targets. For example, as discussed in section 7, pressure on minimising time-to-hire in recruitment must not overrule processes put in place to increase diversity. We recommend that guidance on D&I for managers includes what to do if they perceive a tension between D&I and other targets.

### **Promote mentoring but challenge sponsoring**

We recommend that employers give strong backing to coaching and mentoring programmes, both as effective ways to promote diversity and, where possible, to displace inherently biased sponsor-protégé relationships. Non-directive learning delivered through one-to-one meetings can be a powerful way for people to develop, but these relationships should stop short of favouritism.

We propose that employers should be ambitious in getting rid of favouritism; this would include sponsor-protégé relationships. Where cultural norms exist that support favouritism, they can be called out and challenged on the grounds that people development should be open to all and follow a growth mindset, not a 'fixed' view of talent; and on the grounds that they are fraught with bias, hampering workforce diversity and keeping inequalities in place.

A logical extension of this is that development opportunities should be targeted especially at disadvantaged and minority groups who are normally less likely to take advantage of them – for example, because they lack social networks. As well as helping redress inequality in access to development opportunities, targeting L&D support at disadvantaged groups can also be a way to help them deal with prejudice and disadvantage; that is, to grapple with collective issues that other groups do not face (or face to a lesser extent).

An important proviso to this is that employees may be highly sensitive to colleagues' perceptions of support that is specifically designed for their minority group. Thus, before making L&D support officially available only to specific groups, employers should make sure the target group actually wants this. It may be better to make L&D provision open to all and then promote it more assiduously among minority and disadvantaged groups:

- Avoid and challenge partisan sponsorship relationships that perpetuate bias.
- Educate managers on the role and scope of a coaching or mentoring relationship: the focus should be L&D, not representation.
- Coaching or mentoring should be available to all (or all within the targeted group) and widely promoted, but arranged on an opt-in basis to avoid becoming a box-ticking exercise.
- If targeted support is used, it is done with a sensitive eye towards how it will be perceived and the demand from the intended groups.
- Employers should consider reverse mentoring as a separate mechanism to involve managers more in D&I.

## 9 Conclusions

### **D&I needs a holistic, co-ordinated strategy**

This report explored six areas of challenges and opportunities in D&I practice which should be considered collectively. Isolated initiatives won't make workplaces more diverse or inclusive: employers should develop a holistic strategy that considers a range of aspects of D&I and is multi-pronged in its activity. One strand that runs throughout is the importance of people data, which should play a central role in diagnosing workplace issues before any action is taken. For example, if targets are to be used to good effect, they need to be informed by good-quality workforce data on which groups are underrepresented.

When it comes to implementing strategy, employers should not jump to 'best practice' solutions in blind faith; rather, practices should be viewed as either more or less promising based on research evidence and their relevance assessed against the organisation's context. Employers should be discerning in gauging how suitable an approach may be, balancing healthy scepticism and willingness to evaluate and learn.

### **Key takeaways**

#### **Organisational context**

The workplace, and indeed the national context, will influence the way organisations approach D&I, taking into account local legislation and social cultural norms. A global approach is likely to benefit from a 'loose fit' strategy. A consistent, company-wide set of guiding values and principles on D&I should be in place, which can then be adapted for local contexts. This recognises that diversity looks different across regions, so some flexibility is required to make it relevant to local-level social issues and norms.

### Buy-in and commitment

Middle managers can be less likely to buy into D&I – creating a barrier to change. But to label their resistance ‘permafrost’ is excessive and unhelpful. Middle managers’ lack of buy-in can indicate that senior managers aren’t putting their money where their mouth is and holding them to account for progress on D&I. If middle managers do not see ‘good performance’ criteria change in line with new D&I objectives, they will be prone to perceive senior managers as paying lip service to D&I.

Managers at all levels need to be brought on board carefully. One way to improve buy-in to D&I is to highlight middle managers’ agency and autonomy within a framework set by senior managers, which should not be overly prescriptive. Targets specifying D&I practice should be developed in consultation with middle managers. Yet there is a balance to strike between empowerment and control in D&I – on the one hand, committing to people management processes and standards that tackle identifiable problems and, on the other, recruiting managers to the cause of D&I and giving them licence to be more inclusive.

### People data

People data is crucial for evidence-based decision-making, but the quality of data on workforce diversity is generally poor in UK organisations, especially when it comes to intersectionality. Reasons may include the lack of a legal reporting requirement on diversity, employers’ tentativeness in collecting data that is often sensitive, and employees’ own caution in disclosing personal information.

Tangible business benefits could be gained in this area from relatively limited investment in data development and analysis. For instance, identifying employee groups with the highest turnover can inform policies with clear bottom-line impacts. Employers must recognise that long-term benefits from improving people data quality often offset the short-term costs.

However, there is a potential catch-22, as companies wishing to improve D&I may not yet have the trust of their workforce to disclose openly on sensitive areas such as disability. Any investment in increasing analytical capability must be complemented with moves to improve data quality in partnership with employee groups. In this way, employees can see how enhanced disclosure will be used to guide action and how it would potentially benefit them.

### Diversity training

Diversity training is not only the most established way for employers to change behaviour and organisational climate, but is also an important aspect of compliance that reduces employer liability. While unconscious bias training is hugely popular, its effectiveness is questionable, especially when done as an isolated activity. A wealth of behavioural science shows that human decision-making is rife with unconscious bias,<sup>131</sup> but it does not necessarily follow that teaching people about unconscious bias will reduce it. Indeed, in some cases this has been seen to make people more comfortable with their biases and lead to greater observed bias. Instead, emerging evidence suggests that a perspective-taking approach, which promises to raise awareness and empathy, has the potential to create buy-in for D&I strategy. Employers may do well to focus L&D interventions on perspective-taking rather than on unconscious bias.

### **‘Fit’ versus diversity**

Recruiting people to ‘fit’ a team or organisation is a legitimate and well-established practice, but it must be applied carefully not to compromise D&I. Employers should focus on complementary fit – that is, how a candidate brings capabilities that are unique or in short supply – rather than supplementary fit (more of the same). In this way, person–organisation fit can be aligned to a set of inclusive organisational values, not based on subjective and very likely biased opinion on what sort of person suits a team or job role. It is also important to take a thorough approach to weeding out bias from job specifications and to prioritise this so it is not automatically trumped by the need to recruit quickly.

### **Positive action**

Employers have substantial scope to use positive action to increase diversity. They can run targeted recruitment campaigns and prioritise underrepresented groups in selection and promotion according to the tie-break principle. These can be used in conjunction with other positive action approaches, such as targeted employee support networks and mentoring schemes. Misconceptions about the nature of targeted positive action may lead to it being seen as positive discrimination, which may give rise to objections or resistance. As such, positive action needs to be clearly justified. As well as carefully positioning the rationale for the steps taken, another way is to draw on sectoral data to convince employees of the need to redress an inequality. Employees throughout the organisation should be able to see why target-driven positive action is necessary and how it will be applied in practice.

### **Questions for research**

This report brings together practitioner insight and research evidence on what works in D&I practice. But with diversity being such a complex area, it should come as no surprise that there’s not a simple answer to the question, what works in diversity? Throughout this report, we have made recommendations for what the current evidence suggests is most effective. In some areas – for example, the impact of diversity training – there is good-quality research that helps us understand the potential impact of training.

However, in many areas, conclusive recommendations are not yet possible: the body of research is out of sync with what appear to be critical issues facing D&I professionals. We often find some research that’s relevant to practical concerns, but important points of detail remain unanswered and, as a result, any evidence-based recommendations risk being vague or simplistic. Insights from practitioner expertise often help answer specific questions of how we might design and implement successful strategies on D&I, but we also need research evidence to test whether this thinking is borne out in practice.

It might seem odd, and even frustrating, that an evidence review on a topic as well established as workforce diversity concludes that we need more research. Unfortunately, this is the case. There is a paucity of rigorous and relevant research on how to meaningfully advance D&I in organisations, and we should not pretend otherwise. This is not a suggestion that businesses should wait for more evidence before they act on D&I, but that we need further robust evaluation of the effectiveness of strategies and practices.

Within the areas explored in our evidence-into-practice programme of work, particular areas that warrant more research are:

- the effectiveness of D&I strategies across contexts
- building buy-in for, and managing resistance towards, diversity at work
- further evidence on the effectiveness of perspective-taking approaches to training; for example, are they more effective for some aspects of diversity than others?
- approaches to recruiting for person-organisation fit that complement D&I
- evidence on the long-term impact of tie-breaker approaches to workforce diversity and inclusive organisational climate
- we also note that researchers can help employers gain better-quality data and conduct more powerful analysis on workforce diversity.

Of course, the six areas discussed in this report do not represent a comprehensive list of D&I issues. For example, we have not investigated the impacts of policy statements or pledges relating to D&I, or whether behavioural ‘nudge’ approaches can be used effectively for D&I. These questions and others are worth their own evidence reviews.

Diversity management is an exciting area of exploration that has huge implications for many people’s working lives. We look forward to seeing the body of knowledge develop.

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# CIPD

Chartered Institute of Personnel and Development  
151 The Broadway London SW19 1JQ United Kingdom  
**T** +44 (0)20 8612 6200 **F** +44 (0)20 8612 6201  
**E** [cipd@cipd.co.uk](mailto:cipd@cipd.co.uk) **W** [cipd.co.uk](http://cipd.co.uk)

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