

September 2023



# Embedding EDI in your organisation – a toolkit

# Introduction

At ICAS, we are placing Equality, Diversity and Inclusion (EDI) at the heart of what we do. We're committed to further increasing the diversity of our membership and organisation. ICAS recognises the benefits of having a diverse membership and sees widening diversity as an essential facet of a modern and global profession. Our multiple geographic roots and an increasingly international approach will continue to inform this perspective. A greater diversity of ideas, skills, regional and industry experience, knowledge, ethnicity and gender throughout ICAS' membership is also very important for the continuing long-term success of the CA profession.

In 2020, ICAS set out its EDI statement of intent, which is outlined below:

*'ICAS is committed to placing equality, diversity and inclusion at the heart of all that we do. With our partner organisations, we are committed to building a diverse membership and workforce that reflects and advances the communities we serve. We aspire to lead our profession in addressing these challenges, so that we can learn, grow and advance together.'*

The purpose of this toolkit is to help you promote an inclusive culture within your organisation and to provide some practical guidance and assistance in advancing your organisation's EDI journey. The use of this toolkit is not mandatory but is for guidance only.

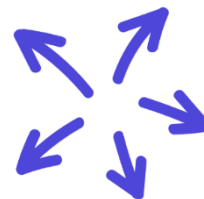
## Why is EDI important for your organisation?

Promoting and embedding EDI in the workplace is an important aspect of good people management. Placing EDI at the heart of your organisation will help create a working environment and culture where individuals feel safe, have a sense of belonging and are empowered to achieve their full potential.

It is also important to consider EDI as part of the wider success factors for your organisation. For example, clients are likely to include those with EDI characteristics (see below) and will benefit from the provision of a welcoming, safe and, where necessary, adapted service provision. Increasingly suppliers to other businesses or governmental departments are being asked to demonstrate their EDI credentials as part of procurement processes.

While legal frameworks vary across different countries, in the UK the Equality Act 2010 provides legal protection for nine protected characteristics:

- Age
- Disability
- Gender reassignment
- Marriage and civil partnership
- Pregnancy and maternity
- Race
- Religion or belief
- Sex
- Sexual orientation



An effective EDI strategy goes beyond legal compliance and seeks to take an intersectional approach by adding value to an organisation, contributing to the wellbeing and equality of outcomes and impact on all employees. This includes accent, age, caring responsibilities, colour, culture, visible and invisible disability, gender identity and expression, mental health, neurodiversity, physical appearance, political opinion, pregnancy and maternity/paternity and family status and socio-economic circumstances amongst other personal characteristics and experience.

## ICAS' Code of Ethics

The ICAS Code of Ethics incorporates the responsibilities of CAs in relation to values of equality, diversity and inclusion.



[Read the Guidance to the ICAS Code of Ethics in relation to EDI.](#)

## An approach to implementing EDI

The approach to implementing EDI within an organisation will look different for each organisation. This will reflect its size, complexity, stage of maturity, resource availability as well as existing status of policies and procedures.

In general, the following steps are likely to be important in developing your approach to EDI:

- **Assess the current situation.** The first step is to assess the current situation within the organisation. This includes understanding any diversity and inclusion data which the organisation might have, as well as the attitudes and beliefs of employees and other stakeholders. (See page 12 for [EDI questions and prompts for your organisation](#))
- **Set goals.** Once the current position has been assessed, the organisation can set goals for improving EDI. These goals should be specific, measurable, achievable, relevant, and time bound.
- **Develop a plan.** The plan should include specific actions that will be taken, as well as a timeline for implementation.
- **Implement the plan.** Take the actions that have been identified while monitoring progress towards the goals.
- **Evaluate the plan.** It is important to evaluate the plan on a regular basis to ensure that it is effective. This includes assessing whether the goals are being met and adjusting the plan as needed.

In addition, some additional factors which may wish to be considered for establishing an approach to EDI include:

- **Get buy-in from senior leadership.** It is important to have the support of senior leadership to be successful in implementing an approach to EDI.
- **Communicate with employees and other stakeholders.** It is important to communicate with employees and seek their input into the organisations commitment to EDI. This can be done through regular communication as well as through training and development programs. Consider also how you communicate the organisation's commitment to EDI with external stakeholders such as clients and suppliers.
- **Create a culture of inclusion.** A culture of inclusion is one where employees, clients and suppliers feel valued and respected, regardless of their background or identity. This can be created by providing opportunities for employees to learn about different cultures and perspectives, and by creating a workplace where everyone feels comfortable being themselves. For clients, it may be about ensuring they feel comfortable about asking for adaptations for service provision or the way in which communication is done or that an understanding is demonstrated of their personal culture.

- **Celebrate diversity.** It is important to celebrate diversity. This can be done through events and activities that showcase the different cultures and perspectives that make up the organisation. Where possible the plans for celebration should be guided by the voices of those who are part of the community.
- **Be patient.** It takes time to create a truly inclusive organisation. It is important to be patient and persistent in your efforts.



# Resources from ICAS

ICAS has a range of EDI resources include guides, templates, podcasts, webinars and thought leadership to help promote and embed EDI in your organisation.



## Inclusive Language Guide

Inclusive language is communication that proactively uses words, phrases and expressions that are welcoming and, where possible, avoids assumptions that may stereotype or exclude people. The exclusion may be inadvertent, but it can still have a negative impact. An example of non-inclusive language might be using a gender-specific term to describe a position within your organisation, such as 'Chairman', when the inclusive alternative could simply be 'Chair'. The benefits of inclusive language are the same as those for all forms of inclusivity. By not being inclusive you risk alienating certain groups, creating a culture that fails to encourage, is unrepresentative of wider society and prevents everyone from being able to fully contribute to the best of their abilities.

- Allows individuals to be seen as they want to be seen – especially important in relation to gender identity.
- Helps you to move with the times – language changes quickly, so being aware and open to shifting language means your whole organisation can evolve in an agile fashion.
- Challenges both conscious and unconscious biases – language is powerful, so adjusting words and phrases can shift mindsets too.
- Supports disclosure and declaration – by creating a safe space and making people feel valued.

You can consider the use of inclusive language in all ways in which you communicate, whether that's when speaking to colleagues, emailing clients, writing job descriptions, or preparing text for use on company websites and publications. Remember that language is fluid and evolves over time – meanings and intentions of words can change rapidly. As a result, it's important to consider this information as a guide and to use inclusive language principles rather than always relying on specific terms that have been used historically.

[Read the ICAS inclusive language guide.](#)



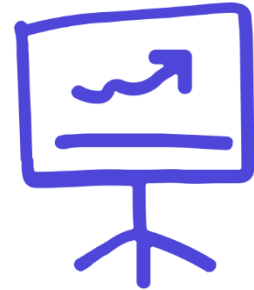
## Webinars

Over the last few years, ICAS has created a library of EDI webinars which are available to all members on demand.

### Webinar 1: Diversity in the accounting profession

Achieving diversity in the accountancy profession remains a challenge. At senior level in particular, the profession continues to be predominantly white and male. While the advantages of having a diverse workforce have become well known, there are barriers to cultural shift.

[Watch this webinar: 26 January 2021 - Diversity in the accounting profession: What do ideas of inclusion lead to understanding success | ICAS](#)



### Webinar 2: Hidden disabilities in the workplace

Dyslexia is a condition that is estimated to occur in at least one in 10 people. We were joined by ICAS Council Member Emily Cheyne CA who shared her personal experiences with dyslexia, and by Dyslexia Routes founder Sharon Hall who explained the nuances and intricacies of neurodiversity.

[Watch this webinar: 23 March 2021 - ICAS Insights: Hidden disabilities in the workplace | ICAS](#)

### Webinar 3: Ending workplace stigma linked to mental health

It's well known that healthy and energised employees enhance business performance. Yet within many workplaces there still exists a great deal of stigma linked to mental health issues such as anxiety and depression.

[Watch this webinar: 6 May 2021 - ICAS Insights: Ending workplace stigma linked to mental health | ICAS](#)

### Webinar 4: How inclusive leadership will boost your business

Watch this webinar for an informal panel discussion that explored the day-to-day gender equality issues faced by women in the profession and revealed ways in which men can overcome the blockers that stop them from acting.

[Watch this webinar: 9 November 2021 - ICAS Insights: How inclusive leadership will boost your business | ICAS](#)

### Webinar 5: Psychological safety, the secret to good leadership

Our speakers share their personal leadership experiences and the practical steps they took to improve psychological safety in their workplaces.

[Watch this webinar: 31 March 2022 - Finance + EDI: Psychological safety, the secret to good leadership | ICAS](#)

### Webinar 6: How to develop a mental-health plan for your organisation

Join Richard Rutnagur of the Scottish Association for Mental Health (SAMH) and representatives from two SMEs explain the personal and professional importance of mental health and share principles that can help all organisations to develop their own mental health.

[Watch this webinar: 12 May 2022 - Ask ICAS: How to develop a mental-health plan for your organisation | ICAS](#)

### **Webinar 7: Black History Month: Action through allyship**

Watch this webinar for an insightful panel discussion with Black professionals from varied business backgrounds. They reveal insights that all CAs can action as allies and share the lessons they have learned as advocates for equality when building inclusive businesses and enterprises.

[Watch this webinar: 31 October 2022 – Black History Month: Action through allyship | ICAS](#)

### **Webinar 8: Lessons on leadership: Lord Woolley**

Lord Woolley is a pivotal figure in race equality within UK Government. Having dedicated his career to tackling racial inequalities within politics, health, education, and employment as well as addressing the social injustices affecting underrepresented communities, he empowers others through his leadership roles.

[Watch this webinar: 19 January 2023 - Lessons on leadership: Lord Simon Woolley | ICAS](#)

### **Webinar 9: CA Summit 2022**

Speakers from the worlds of finance, business and academia delivered thought-provoking topical debate, expert insight and thought leadership on topics such as diversity, sustainability, and the post-pandemic outlook.

[Watch this webinar: October 2022 - Catch up on the CA Summit 2022 | ICAS](#)

### **Webinar 10: Fostering female ambition**

To coincide with International Women's Day in 2023, Chartered Accountants Worldwide revealed the results of a global research study mapping the paths of mid-career women in the Chartered Accountancy profession. The study was commissioned by the Chartered Accountants Worldwide global ED&I task force and was carried out by the research agency, Magenta.

[Watch this webinar: 8 March 2023 - What's stopping YOU? Fostering female ambition - YouTube](#)

### **Webinar 11: Challenging conversations – Bullying in the profession**

In this webinar, hosted in partnership with the Law Society of Scotland and Adam Smith Business School, we provide examples of bullying experienced by members of the accountancy and legal professions and explore what needs to be done by organisations to eradicate such behaviour.

[Watch this webinar: 29 September 2020 - ICAS Insights | Challenging Conversations: Bullying in the Profession: - YouTube](#)

### **Webinar 12: Equality, diversity and inclusion in the accountancy profession**

In this webinar, Catherine Burnet CA and Jim Robertson CA discuss how to embed a culture of EDI in the workplace.

[Watch this webinar: ICAS Insights webinar | Equality, diversity and inclusion in the accountancy profession - YouTube](#)



## Podcasts

As part of the insight's series, ICAS has created a range of podcasts on various topics.

- Listen to [How CAs can help champion equality](#)
- Listen to [Diversity in the profession](#)
- Listen to [Social mobility and ethnic diversity](#)
- Listen to [Improving gender equality](#)
- Listen to [Mental health and mental wellbeing](#)
- Listen to [Anxiety, Mental health and Neurodiversity](#)

## Thought Leadership

Explore a variety of EDI content and thought leadership articles featured in CA magazine.

- Read [Diversity and the benefits of networking](#)
- Read [Embracing neurodiversity](#)
- Read [Fostering inclusive leadership](#)
- Read [Leadership through turbulent times](#)
- Read [Putting values and purpose before growth](#)
- Read [Tackling EDI fatigue](#)
- Read [Addressing unconscious biases](#)
- Read [De-stigmatising mental health](#)
- Read [Diversity in Web 3.0](#)
- Read [Disability inclusion in the workplace](#)
- Read [Resilient leadership](#)
- Read [Psychological safety](#)
- Read [Putting wellbeing first](#)
- Read [EDIs strategic importance](#)
- Read [Inclusive workplaces](#)
- Read [Women on Boards](#)
- Read [Boosting social mobility](#)
- Read [Back from the brink](#)
- Read [Charlotte Valeur on Autism](#)
- Read [Keeping pace with EDI](#)
- Read [How to break the glass ceiling](#)
- Read [Revolutionising workplace culture](#)
- Read [Neurodiversity as a superpower](#)
- Read [Improve your Emotional Intelligence](#)
- Read [Making the workplace more equal](#)





## Further help and advice

ICAS offers a range of advice and support for members and students through a variety of services, which include:

### **Whistleblowing helpline**

Taking a stand on EDI still takes courage, but sometimes one individual can make a big difference. If CAs lead by example, others will follow. If CAs speak up, others will listen. If CAs reach a point where they feel they need to whistle blow, then hopefully their actions can help ensure that previously tolerated behaviours become unacceptable. [That is the real message behind The Power of One which you can read more about here.](#)

It's important our members and students know where to turn for help. It is likely the relevant organisation will have speak-up policies which can provide support and outline the steps to take. CAs can also offer each other an excellent support network and ICAS staff are available to provide advice. However, sometimes independent counsel is called for, particularly when there are ethical and legal considerations.

ICAS has partnered with the independent whistleblowing charity Protect to provide members and students with access to its confidential helpline. We are proud to be able to work with Protect for the benefit of them all, so that when CAs and CA students feel they need to speak up, they will be supported and informed.

[Read more about Protect's Independent whistleblowing helpline.](#)



## Ethics buddy service

Read about the [Ethics Buddy Service](#) which enables a CA facing an ethical problem, where deemed appropriate, to have confidential and informal discussions with an experienced member in order to explore the matter and assist them in considering how they might approach it.

Often, people caught in a dilemma struggle to see the wood for the trees. If a CA has an issue which is troubling them, the Ethics Buddy Service will give them access to constructive input early in the process to help delineate the issues and prevent matters from escalating. The buddy's role is to listen, encourage a dialogue and contribute to the thinking process. They might ask CAs to consider various approaches but, as they will not be party to all the information, they cannot offer solutions. The service provides an opportunity to talk but does not offer advice. Ultimately, it is up to the CA to make their own decision on the best way forward.

It is ethical issues that they can take weeks or months to resolve – after which it may be several years before the person encounters another. The Ethics Buddy Service – which could be limited to a one-off call or a series of chats, though in a time-limited way – essentially sits between [ICAS' Ethics Helpline Service](#), which addresses more specific questions at a particular point in time, and its mentoring options, via which relationships are developed over a longer period of time. It supplements the existing provision of the aforementioned ethics helpline and access to the [Protect whistleblowing helpline](#). It does not provide legal advice, which CAs will need to seek independently.

## Evolve member wellbeing helpline

The wellbeing of our members is a priority for ICAS, so offering a support service to assist our members is fundamental to our EDI aspirations. The Evolve member wellbeing helpline is free for all Evolve practice firms and their employees. It is provided by Health Assured – the UK and Ireland's leading wellbeing provider. This is a free confidential helpline that gives Evolve members, including CAs and non-CAs working in your organisation, access to experienced counsellors and advisers who are there with support 24/7. As well as the free, confidential helpline, members can benefit from the online wellbeing portal and app to access advice and wellbeing support at their fingertips.

Plus, members can connect with an expert counsellor for a block of one-to-one sessions, free of charge.

The suite of wellbeing services is designed to help deal with problems whether arising from personal or work life that could be affecting your health and general wellbeing. Support is available on a wide range of matters such as mental wellbeing, money management and debt, legal issues and medical information.



[Find out more information about Evolve here](#)

## ICAS mentoring scheme

At ICAS, we strive to assist and inspire you through every stage of your professional life. This is why we established the ICAS mentoring programme, to better support our members' development, both professionally and personally. Working with a mentor can be beneficial at all stages of your career, from your training contract, through your early post-qualified years and even when you're an established manager or leader. This mentoring programme is a great way for CAs to turn ambitions into success and can support your career development. Building a strong mentoring relationship can open doors, and for mentors, is the perfect way to give back and help fellow members.

The ICAS mentoring platform is designed to meet all your career mentoring needs, which you have access to as part of the programme. It combines a sophisticated mentor/mentee matching system with a straightforward sign-up process, matching you to the right mentor or mentee that best fits your needs.

It easily connects prospective mentors and mentees, no matter where they are in the world, with the ability to message, set up and host either online or in-person meetings. The service has been designed to support our diverse membership by collecting data from CAs who sign up to the service as a mentor or mentee to ensure that the matches are compatible.

The ICAS mentoring platform is available to ICAS Students (above the age of 18) and all ICAS members at all stages of their careers.

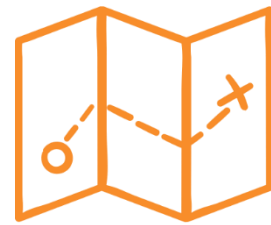
[You can find out more and register for the scheme here.](#)

## **Policies and Procedures**

ACAS (Advisory, Conciliation and Arbitration Service) sets out several useful policies and templates which may be helpful when thinking about what is right for your organisation.

These might include:

- EDI Monitoring Form
- EDI Policy Template
- Induction Template
- Job Description Template
- Flexible Working Requests
- Bereavement Policy
- Shared Parental Leave
- Redundancy
- Disciplinary Policy
- Grievance Procedure



[Find out more here about ACAS Templates for employers here.](#)

## **Recruitment, selection and interview**

To assist you with your recruitment, selection, and interviews, we have provided some draft invite to interview letters and some competency-based interview questions. These are guiding documents and should be adapted to suit your workplace.

[View our draft invite to interview letter here.](#)

[View our example competency-based interview questions here.](#)

CIPD has produced some useful guidance and best practice on EDI at work which you may find helpful.

[Read the CIPD Diversity and inclusion at work report here.](#)

[View the CIPD Diversity and inclusion at work infographic here.](#)

## EDI questions and prompts for your organisation

ICAS has developed some prompts and questions which can be used to help you map, plan and start your organisation's EDI journey.

It's not an exhaustive list but contains elements of the things you should think about.

Embedding EDI in your organisation	Yes / No / In progress
Do your employees understand what EDI means in the workplace environment?	
Are your employees aware of the nine protected characteristics as defined by the Equality Act 2010?	
Can your employees identify each type of discrimination (direct, indirect, bullying, harassment, and victimisation) ?	
Are your employees aware of the business risks of not embracing EDI in the workplace?	
Have you outlined your commitment to EDI – with some examples?	
Can you detail the employee benefits your organisation offers to support EDI?	
Are you using the right language to draft job adverts (e.g. avoid using gender coded words (unless legally required) qualifications etc)?	
Are your recruitment packs accessible to candidates with disabilities?	
Do you advertise your roles in places that will reach a diverse audience (i.e. LinkedIn, Indeed and Diversity.com)	

Embedding EDI in the workplace	Yes / No / In progress
Arrange Unconscious Bias training for your employees	
Anonymise personal applicant details in recruitment packs that may influence your decisions	
Use a rating standard or matrix for reviewing anonymised candidate packs	
Focus on the content of the applications, rather than writing skill	
Keep a written record on how decisions were made	
Ensure that all necessary steps have been taken to ensure equal opportunities are offered to candidates who may have accessibility requirements	
Integrate EDI training into induction	
Provide an opportunity for check-ins during the induction and onboarding	

Gather feedback from new starters to help improve your induction process	
Ensure there is support for new starters (Buddy / mentoring schemes)	
Be curious and listen to your new starters	

Creating an EDI culture	Yes / No / In progress
Identify your barriers to change?	
Can you create a risk assessment of those barriers and identify a mitigation plan?	
Ensure that communication to colleagues/employees is clear	
Involve employees in the decision-making process of the proposed change	
Create buy-in amongst your employees through passion for positive change	
Keep the dialogue open with your colleagues / employees	

## Socio-economic diversity

Attracting and retaining a wider talent pool of academically talented individuals for a poorer socio-economic background is becoming a focus for the profession and for firms. Things that you may wish to consider in this area are:

- Background of employees, using a self-identification survey. e.g. Parental employment when age 14, highest level of education completed by parents, measure household income, postcode to provide insights into community areas etc...
- Highlight permissions related to data protection, so employees know how their information will be used.
- Career progression – Track the career progress of employees from different socioeconomic backgrounds. Look at salary and associated increases, disparities in promotion, disparities in bonus structure, leadership positions.
- Employee Surveys – use these to gather feedback from employees about their perceptions of socioeconomic diversity and inclusion within the organisation. Look at lived experiences and identify areas of improvement.
- Overall, any metrics used to measure socioeconomic diversity should be sensitive and respect privacy. Where appropriate anonymise data when collecting and keep a regular programme of review and update to see how the organisation evolves over time.
- The UK Government published guidance for employers to attract and keep talent from poorer backgrounds. [Read this guidance here.](#)

# Good practice guides

Available to ICAS members only. No part of GoodPractice's help sheets or guides may be reproduced without their permission.

## **Mentoring racial or ethnic minorities**

This article offers advice to individuals looking to mentor an employee from a racial or ethnic minority. Based on the work of Professor David A Thomas of Harvard Business School, it identifies the challenges presented by interracial mentoring relationships and offers tips to overcome them.



## **Effective intercultural communication**

There are immense benefits to communicating with a varied range of cultures, as we can learn much from others. This article discusses human behaviour and offers tips for communicating effectively with people from very different backgrounds.

## **Definitions of diversity**

Language has been identified as one of the principal areas where prejudice can lurk. It is therefore vital that your organisation not only sets out its intentions for tackling diversity in a meaningful manner but does so in the appropriate language. This article helps to explain how.

## **The Equality Act – Leaders and managers**

Employment lawyer Elin Pinnell of Capital Law explains what is covered by the 2010 Equality Act, which brought together nine major pieces of equality and discrimination legislation and examines its implications for leaders and managers.

## **Leading diversity**

Globalisation, the increasing diversity of workforces and markets and the growth of international teams all add up to a compelling business case for the management of diversity. This outlines how senior management can increase the diversity of the workforce in a purposeful way and lead it with a new range of competencies.

## **Managing intergenerational talent**

Managing a team of different ages can be highly rewarding, as you enjoy a range of outlooks and expertise. We need to acknowledge differences between age groups, while ensuring fair and equal treatment for all. These top tips will help you manage an intergenerational team successfully.

## **Barriers to effective intercultural communication**

Language differences, whether verbal, written or non-verbal, can present significant barriers to successful intercultural communication. This article examines these differences and outlines the best methods to overcome them.

## Links to other external resources

- Visit [Build a workplace that works for LGBTQ+ people. | Stonewall](#)
- Visit [CIPD – Diversity and inclusion in the workplace](#)
- Visit [CMI – delivering diversity](#)
- Visit [CMI – disability in the work place](#)
- Visit [UK Gov – Disability rights](#)
- Visit [SAMH – mental health support](#)
- Visit [Mind](#)
- Visit [Access to Work: get support if you have a disability or health condition](#)





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