



Social Mobility
Commission

Masterclass: Data

Insights to drive your decisions and interventions
Afterpack



HM Revenue
& Customs



2pm – 3:30pm 25th March 2021



@SMCommission



Social Mobility Commission



@socialmobilitystories

#socialmobility www.socialmobilityworks.org

Introduction



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Thank you for joining us for the second in our masterclass series of 2021.

The purpose of this 'after-pack' is to share the good practice, insights and presentations delivered during the event. It includes:

- Your review and refine check list and next steps
- Presentations from the Social Mobility Commission, BBC, Work Advance/PEC and the HMRC.
- Overview of the SME Index from the Social Mobility Foundation

The recording of the event can be found [here](#).



Your data review and refine checklist (1/3)

It will enable you to review and refine your data strategy and focus on next steps. We would recommend that it be used alongside any internal documents you may have already in place.

Area	Recommendation	Current Status			Next Steps	Due Date
		Nothing/Not something you currently do	Do something in this space but limited	Actively do this		
DATA STRATEGY	Data foundations Do you have D&I targets as a business? Do you use national benchmarks? Do you have socio-economic diversity targets? Are you using the latest scorecard from the SMC to track your KPIs? (link) Do you publish this data? Do you connect with others in the sector to gain sector commitment to targets?					
	Data collection Do you collect any form of D&I data? Is this done through an annual survey? Do you collect data at any other times of the year, or at employee points? Do you collect socio-economic data at both the recruitment and existing employee stages? Do you use socio-economic questions recommended by SMC? Are you aware of our latest guidance? (link)					
	Data communication Do you make your employees aware of your socio-economic intentions? Do you publicise this alongside your data collection survey? Are people aware as to why you are asking the socio-economic questions that you are asking? Do you clearly communicate how the data will be used and stored?					
	Maximising response rate Is management fully engaged with the data agenda? Do you share with staff how questions are strategically connected and relevant? Are diversity surveys mandatory? (always with the option 'prefer not to say')					



Your data review and refine checklist (2/3)

It will enable you to review and refine your data strategy and focus on next steps. We would recommend that it be used alongside any internal documents you may have already in place.

Area	Recommendation	Current Status			Next Steps	Due Date
		Nothing/Not something you currently do	Do something in this space but limited	Actively do this		
PRACTICAL ELEMENTS	Analysis of results Do you analyse socio-economic data at each grade level/job role (i.e. to assess progression)? Do you analyse socio-economic data against pay rewards and bonuses? Do you analyse your training take up by socio-economic background? Do you benchmark and contextualise against industry and national data? Do you use data to inform change and evaluate progress?					
	Informing your inventions Outreach Do you collect and analyse outreach data to examine how participation converts to desired outcomes, and how this varies between groups? Do you use your outreach strategic plan to identify key impact metrics and measure against these?					
	Recruitment Do you compare applicant data with external benchmarks to assess how well they reflect the eligible talent pool? Do you monitor data during the application process to identify where diversity is low? Do you evaluate the impact of various entry routes on SEB diversity?					
	Progression Do you benchmark socio-economic background progression against time to progress and job performance? Do you consider intersectionality when measuring progression? Do you assess outcomes on progression after apprenticeships are completed by socio-economic background?					



Your data review and refine checklist (3/3)

It will enable you to review and refine your data strategy and focus on next steps. We would recommend that it be used alongside any internal documents you may have already in place.

Area	Recommendation	Nothing/Not something you currently do Do something in this space but limited Actively do this	Current Status			Action	Due Date
LEADERSHIP AND CULTURE	Leadership and culture Do leaders and managers support the analysis of data, to understand the current situation, indicate opportunities for action and enable you to measure change? Is consistent collection and analysis of data in the context of your organisation and against relevant external benchmarks a central element of your strategy, underpinning all other aspects? Do you use data to help inform your decisions about the rate of progression? Do you use data to help inform you about performance outcomes? Do you use this data to help inform your pay grades? Do you use data to help inform your decisions about pay and reward? Do you share data with managers to educate them about the disproportionate rate of progression/pay/reward etc for people from lower socio-economic backgrounds?						
	Advocacy Do you share the data findings internally within the business? Do you share the data findings externally? Do you make a public commitment to publishing data annually and reporting on trends? Do you publish aggregate diversity data, together with the rationale for collecting these and statements about your strategy in response?						

Your data review and refine checklist – next steps



Now that you have had time to reflect on your current data strategy, what are your next steps?

Follow up questions	Answers	Due Date
How many did you get in each area; red/amber/green?		
What are your quick wins?		
Who do you need to speak with in your organisation about each area?		
Who are the decision makers to help you make this change?		
What will your project plan look like?		

Welcome to the community and enjoy driving a change in this space!

A [scorecard for success](#): This scorecard outlines targets for six pillars of D&I and represents 'best practice' of leading organisations and can help guide your goals.



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2pm – 3:30pm 25th March 2021



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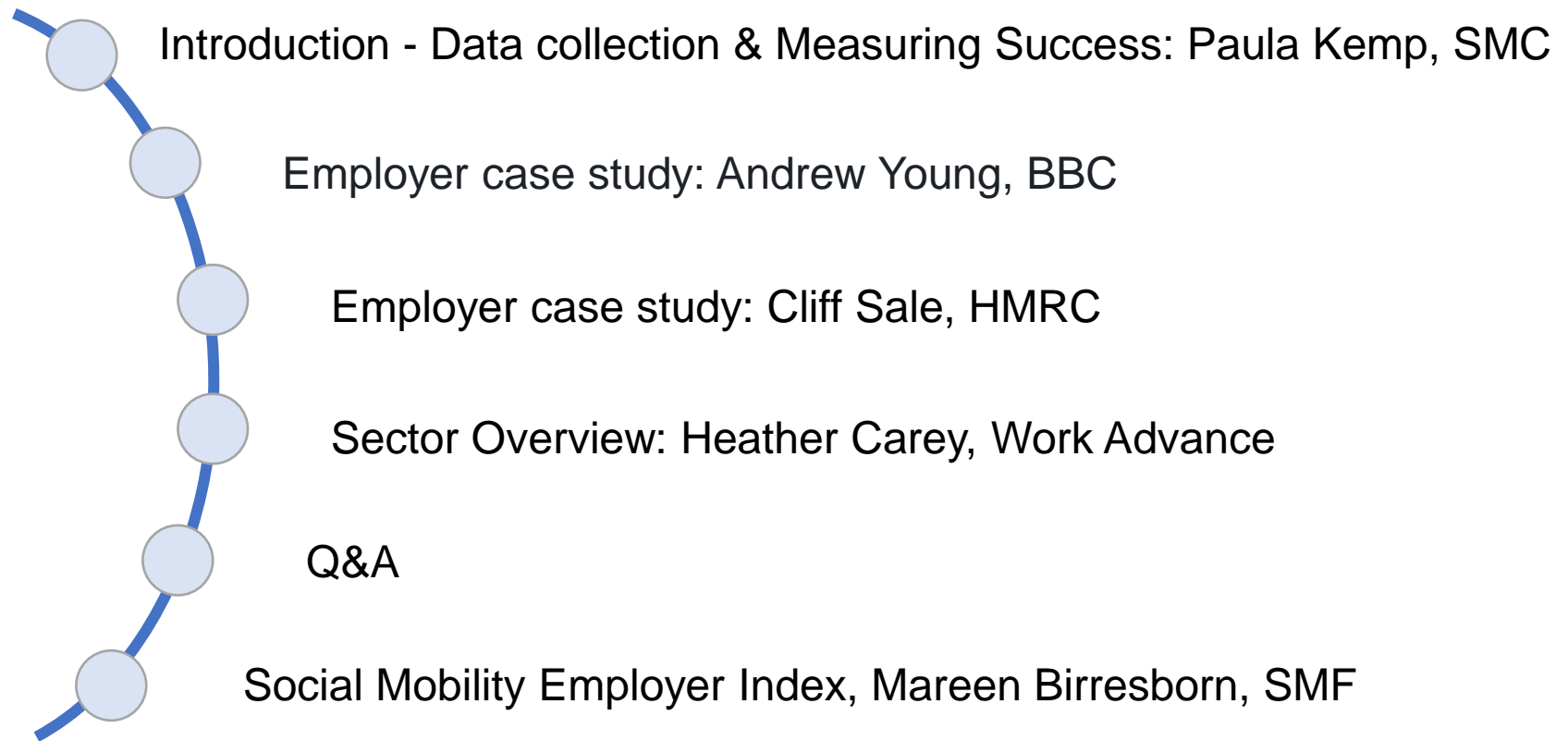
@socialmobilitystories

#socialmobility #askthequestion www.socialmobilityworks.org

Today's session



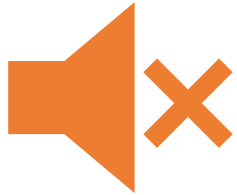
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Workshop etiquette



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Remain on mute



**Use the Q&A function
to ask questions**



**Webinar will be
recorded**

What is social mobility?

A collage of faces, including a woman's face on the left and a man's face on the right, with a large, semi-transparent downward-pointing arrow overlaid across the center. The background is a light blue-grey gradient.

Social mobility is the link between a person's occupation or income and the occupation or income of their parents.

In other words, it's about **ensuring your background doesn't determine your future.**



Your voice: what you are doing

Last week we asked: what data activity/interventions does your organisation currently do to support your social mobility agenda?

Question asked	Percentage of respondents
Has a diversity and inclusion strategy	90%
Has set D&I targets	45%
Has set economic diversity targets	14%
Collects D&I data through an annual survey	50%
Records D&I data on its HR systems	68%
Collects specific social mobility data	47%
Collects specific social mobility data through an annual survey	24%
Records specific social mobility data on its HR system	37%
Uses the questions recommended by the SMC to collect social mobility data	27%
Shares the data findings internally within the business	40%
Publicly shares social mobility data	14%
Use data to help inform your success of attracting individuals from a lower socio-economic background	20%
Use data to help inform how people progress in your organisation	21%



Your voice: Your challenges

13%



feel your organisation understands the importance of measuring socio-economic data across the organisation

3/4



feel there is a lack of understanding of what to ask to obtain socio-economic diversity data of current employers

80%



tell us that your response rate for data collection is low

83%



feel there is little or no link between the data you collect and your social mobility interventions

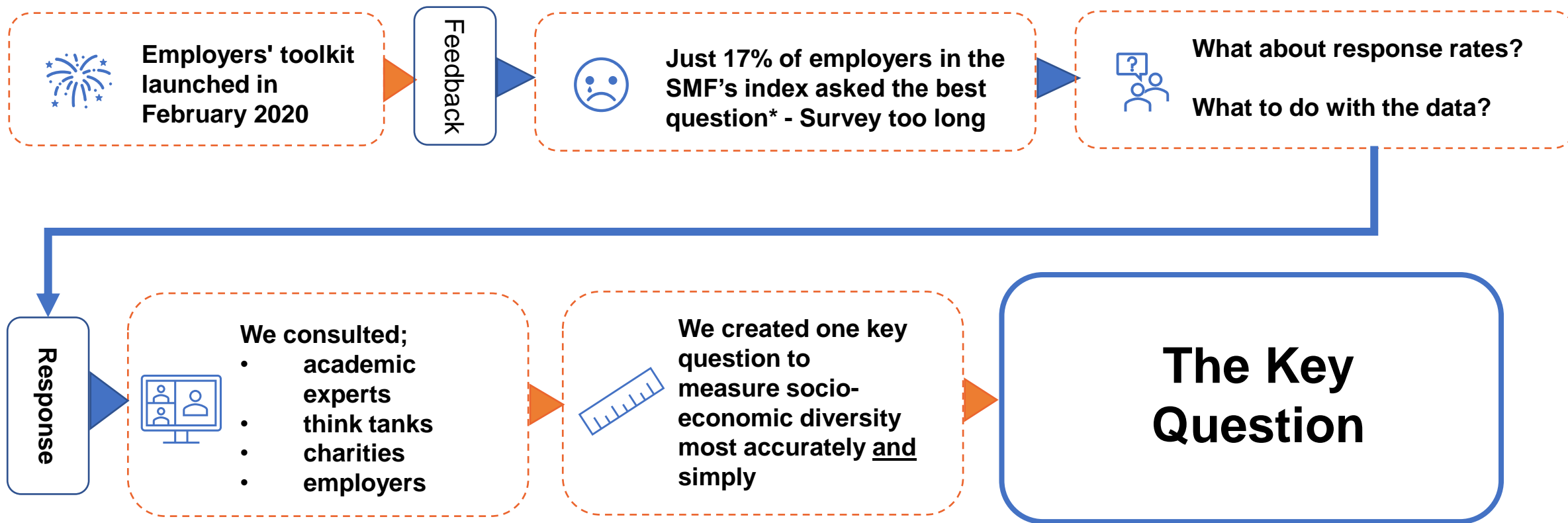
Nearly 1/2



find it challenging knowing how to interpret data gained



Our data question journey so far...



Endorsed by our partners:



The Prince's Responsible Business Network



*Data from the Social Mobility Employer Index, produced by our partners at the Social Mobility Foundation

Step 1: Ask the question



What was the occupation of your main household earner when you were aged about 14?

Endorsed by our partners:



The Prince's
Responsible
Business Network



Championing better
work and working lives



CITY
OF
LONDON



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PLEDGE



What was the occupation of your main household earner when you were aged about 14?

How to group responses from the key question.



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PROFESSIONAL

Modern professional & traditional professional occupations such as: teacher, nurse, physiotherapist, social worker, musician, police officer (sergeant or above), software designer, accountant, solicitor, medical practitioner, scientist, civil / mechanical engineer.

Senior, middle or junior managers or administrators such as: finance manager, chief executive, large business owner, office manager, retail manager, bank manager, restaurant manager, warehouse manager.

INTERMEDIATE

Small business owners who employed less than 25 people such as: corner shop owners, small plumbing companies, retail shop owner, single restaurant or cafe owner, taxi owner, garage owner.

Clerical and intermediate occupations such as: secretary, personal assistant, call centre agent, clerical worker, nursery nurse

WORKING CLASS

Routine, semi-routine manual and service occupations such as: postal worker, machine operative, security guard, caretaker, farm worker, catering assistant, sales assistant, HGV driver, cleaner, porter, packer, labourer, waiter/waitress, bar staff.

Technical and craft occupations such as: motor mechanic, plumber, printer, electrician, gardener, train driver.

Long-term unemployed (claimed Jobseeker's Allowance or earlier unemployment benefit for 1yr plus).

EXCLUDE

Other: such as: retired, this question does not apply to me, I don't know, I prefer not to say.

Want to up your game?

Ask these supplementary questions.



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Question 2

- Which type of school did you attend for the most time between the ages of 11 and 16?



Why ask?

This measure shows extreme economic and cultural advantage. Just 7% of people attend independent schools and yet our research with our partners at the Sutton Trust show how over-represented these groups are in top jobs.



Question 3

- If you finished school after 1980, were you eligible for free school meals at any point during your school years?



Why ask?

This is a measure of extreme economic disadvantage. It can help you target outreach programmes.



OPTIONAL - Question 4

(only for new graduate hires).
Did either of your parents attend university and gain a degree (e.g. BA/BSc or equivalent) by the time you were 18?



Why ask?

Being the 'first in family' to attend signals a potential lack of support to navigate university and entry into the graduate workforce.





Improve your response rates

The quality and value of the data you collect depends on high response rates



Set a clear and transparent goal to create a more socially diverse and inclusive workplace



Applicants and employees are more likely to engage with these questions if they see them as part of an integrated D&I strategy



Explain why this information is important and how it will drive positive change



Offer support and encouragement to managers, especially where response rates are low



Eventually, make responses to survey's compulsory but always with 'Prefer not to say' as an option on the survey



Issues around data storage, use and confidentiality are critically important. Be clear about this: who will see data, how you will ensure anonymity, and how it will be stored and used



Use senior leaders to act as role models

Collect, analyse, publish



Report three groups:

- Professional backgrounds
- Intermediate backgrounds
- Working class backgrounds

Ask yourself: is our workforce equal?

Which is the dominant socio-economic group?

Compare the % of applicants and staff members from each background.

Compare your data against the national (and industry) benchmarks

If your business isn't representative of the nation:

- Develop a strategy
- Use our toolkit



Want to lead best practice?

Publish your data and invite your supply chain to ask the question of their workforce, too!

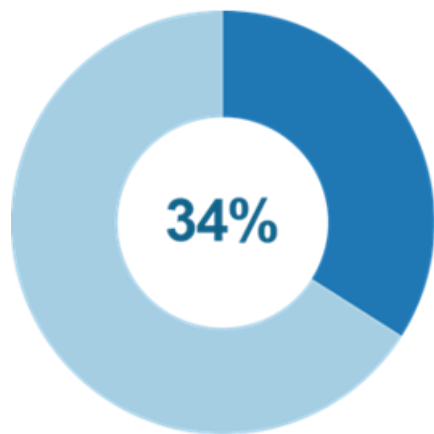


🎯 National benchmarks*

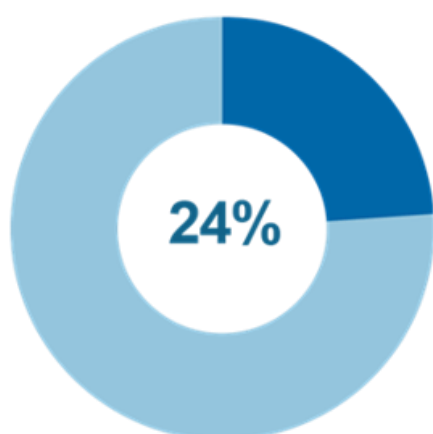


The key question – parental occupation at age 14

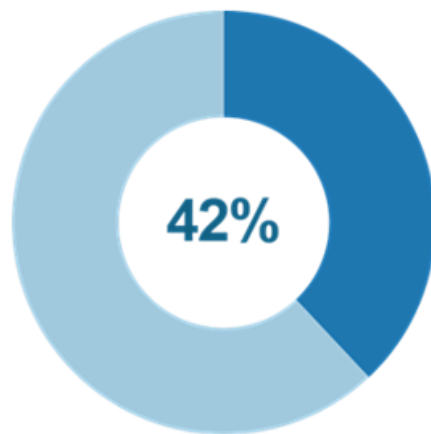
Professional



Intermediate



Working class



Type of school attended at age 11–16



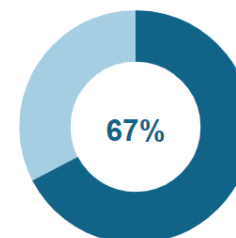
7.5% Independent schools



Free school meal eligibility



15% Pupils at state-funded schools



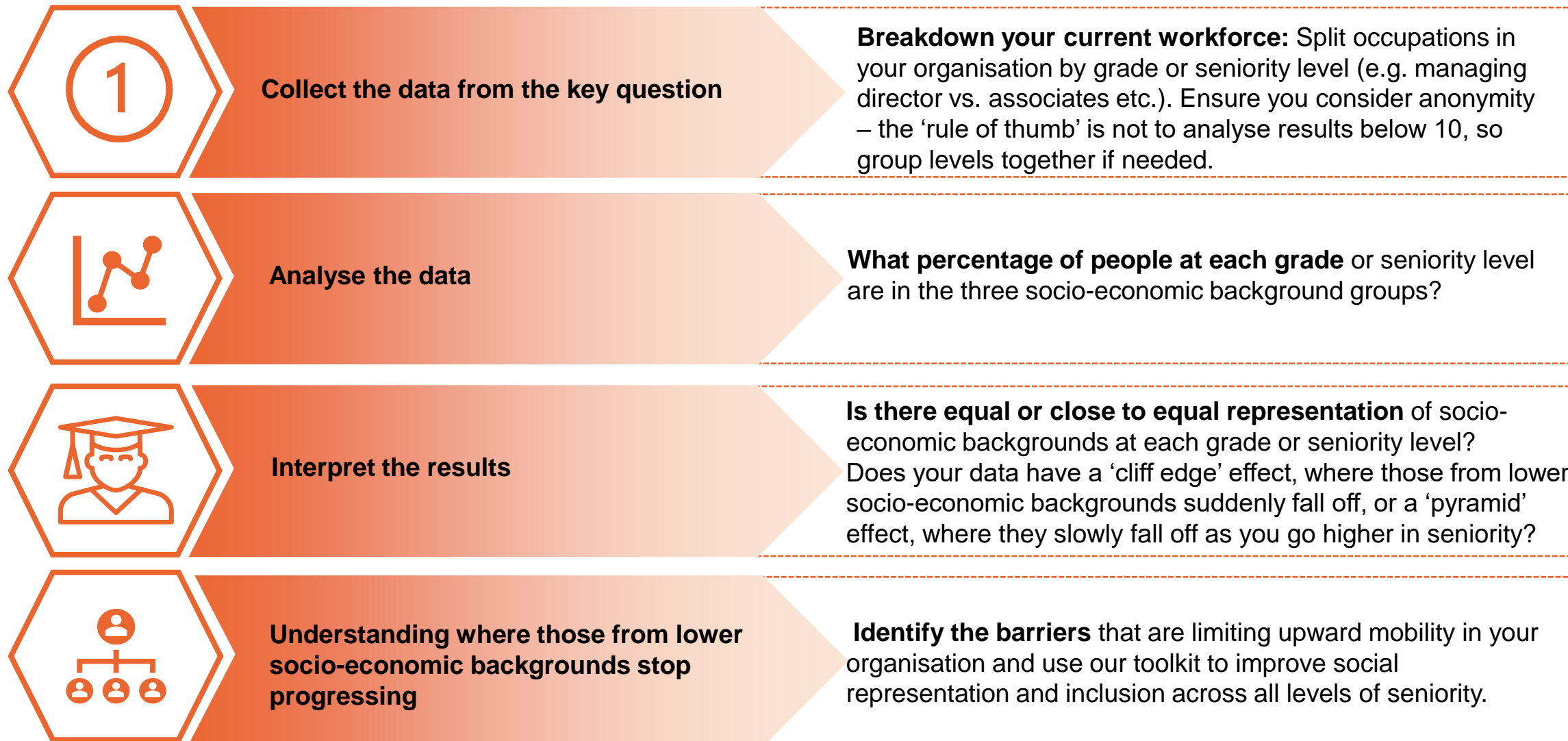
67% of graduates are first in family to attend uni

*Some industry benchmarks will also become available on our site as we release industry-specific toolkits



Step 2: Assess progression

Don't just focus on getting in. Talented individuals from lower socio-economic backgrounds are often overlooked when it comes to moving up.



Step 3: Look at apprentices and training opportunities



Our research consistently shows those from working class backgrounds receive less training and apprenticeships



Get the overall picture

Analyse your overall apprenticeship and training makeup by socio-economic background as you would with your workforce, using the key question.



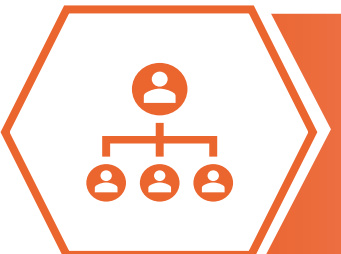
Completion rates

Are there certain apprenticeships or training offers that are **over or under-represented** by socio-economic status?



Assess by level and completion

Look at the percentage of learners by socio-economic background at **each Level** and who have **completed** apprenticeships/training. Are they proportionately represented?



Progression

Use your workforce data to look at who receives a promotion or goes onto a higher level of apprenticeship within a set period of time after they are done with their training.



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The scorecard

A tool for mature organisations to track progress

The scorecard*



Data

Understand the current situation; inform activities; evaluate change

- Measure your progress, we have developed a **scorecard** with Key Performance Indicators in: outreach, hiring, progression, culture & leadership, advocacy and data.
- The targets have been set using data collected by our partners at the **Social Mobility Foundation** through their **Social Mobility Employer Index**.
- The scorecard will help you measure progress against set targets, drive constant improvements and assess yourself against leading practice of other employers in the Index.

Description of metric	Target	Benchmarking data
Response rate for survey question on SEB	Aim for overall response rates of at least 70%.	87% completion rate by new hires 86% completion rate by current employees
Data on SEB is collected on applicants, new hires, apprentices and current workforce	Parental occupation (question one in our guidance) is collected for applicants, new hires, apprentices and the workforce. <i>Want to keep upping your game? Collect data on two additional questions: free school meal eligibility and type of school attended. And, if you have a graduate scheme, ask if a parent(s) went to university.</i>	New hires: <ul style="list-style-type: none"> • 31% collect data on parental occupation • 58% collect data on type of school attended • 49% collect data on FSM On current workforce: <ul style="list-style-type: none"> • 37% collect data on parental occupation • 56% collect data on type of school attended • 38% collect data on FSM
Spread of your workforce by SEB	Aim eventually to match the proportion of the UK population; set incremental targets to reach this goal.	The national spread of the working population by SEB is: <ul style="list-style-type: none"> • Professional SEB: 34% • Intermediate SEB: 24% • Lower SEB: 42%

*Download the scorecard [here](#).

Socio-economic diversity and inclusion at the BBC

Andrew Young

Workforce Diversity & Inclusion Lead



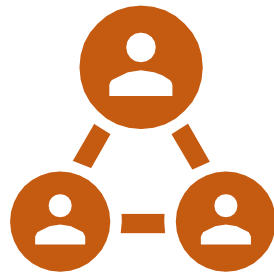
BBC

Diversity & Inclusion Plan
2021-2023





HM Revenue & Customs

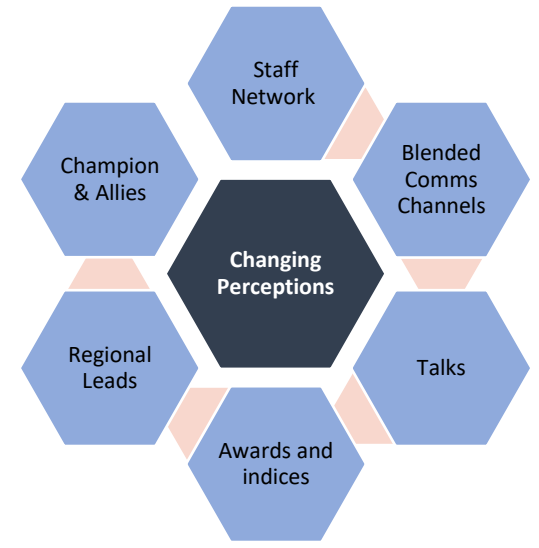
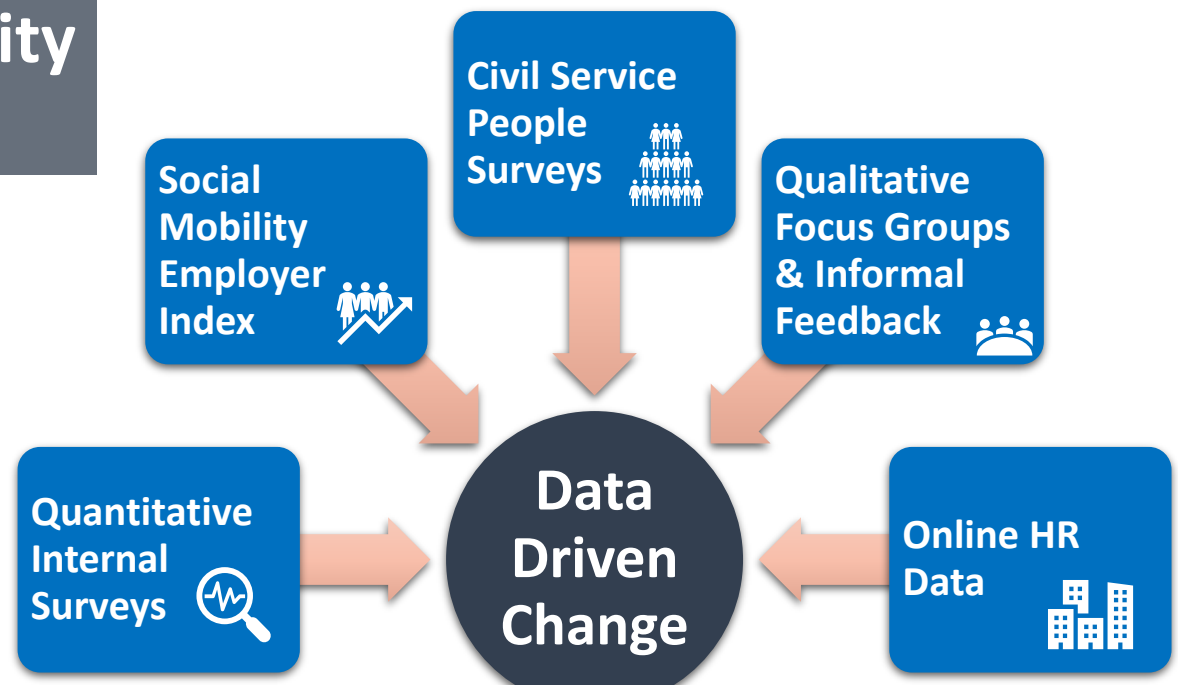


Our progress and top tips to
overcoming barriers to data
collection

Cliff Sale
HMRC Social Mobility
Programme Lead



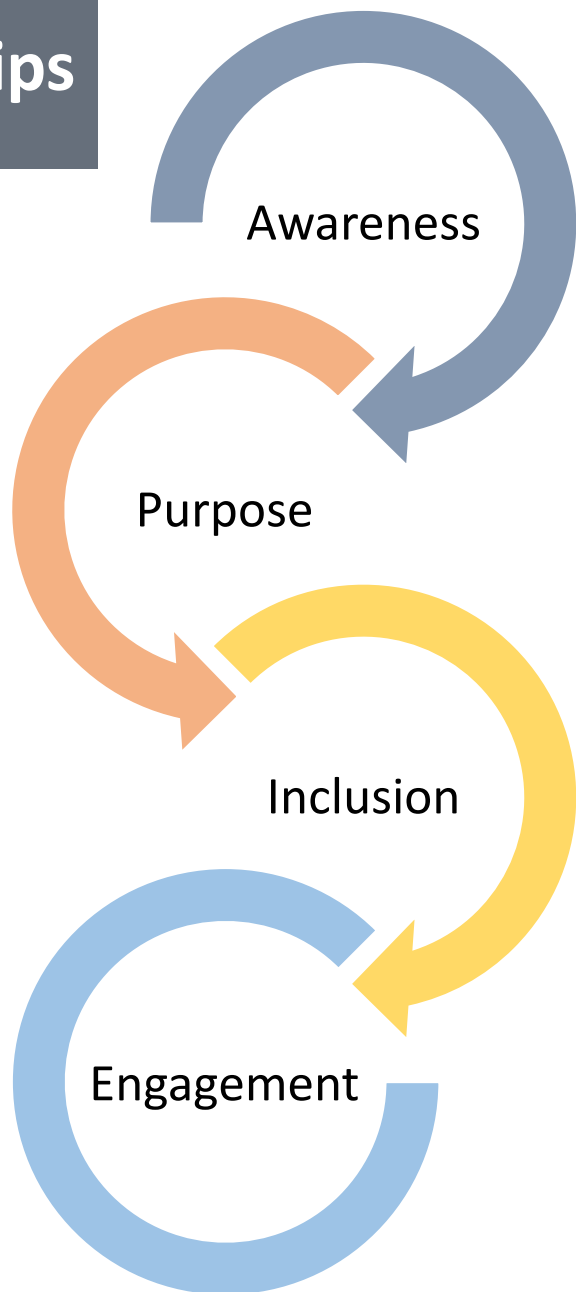
HMRC Social Mobility Data and Deliverables



OFFICIAL



Top Tips



Build momentum & create opportunities for conversations

- Recognise colleagues may not feel safe/comfortable
- Use a variety of different role models for relatability
- Get a slot on any agenda to 'spread the word'
- Get allies to help overcome misconceptions

Be clear about what you're trying to achieve and why

- Explain the What and the Why – start small and grow
- Provide context, transparency and strategic implications
- Highlight significant ways in which data has helped
- Be consistent to ensure data compatibility and gain trust

Demonstrate this involves everybody

- Emphasise *diversity* and *all* backgrounds
- Help understand - not demonise - privilege
- Good data collection needs to include *everyone*
- Don't just target the "obvious" groups

Get people to drive the change

- Use ambassadors and allies at every level
- Find ways to sneak the message into the everyday
- Set challenging, but realistic targets
- Measure, evaluate and celebrate achievements & change



Using data to catalyse industry leadership on social mobility: an example from the UK Creative Industries

www.pec.ac.uk
@CreativePEC

Creative Industries
Policy & Evidence Centre
Led by **nesta**

Heather Carey
Director, Work Advance

Social Mobility Employers Masterclass
Series: Data

25th March 2021

Why is data important at an industry level?

- To establish a baseline
- To better understand the problem
- To inform action
- To assess impact
- To track progress

.... so, for all the reasons why it is important for businesses, but with a focus on **common** understanding, **shared** ownership and **collective** action...

And this is important:

- Information & coordination failures?
- A problem shared is a problem halved?
- Limits to individual sphere of influence?

The PEC's Class in the Creative Industries programme

“catalyse **collaborative** action – led by industry, trade bodies, wider stakeholders and Government – to test and trial new policy, programmes and practices that promote socio-economic inclusion in the Creative Industries; to show **leadership as an industry** on the vital issue of social mobility in the UK”

Phase 1: Getting in & getting on

What: Establish a baseline picture of the participation and progression of those from working-class backgrounds in the CIs

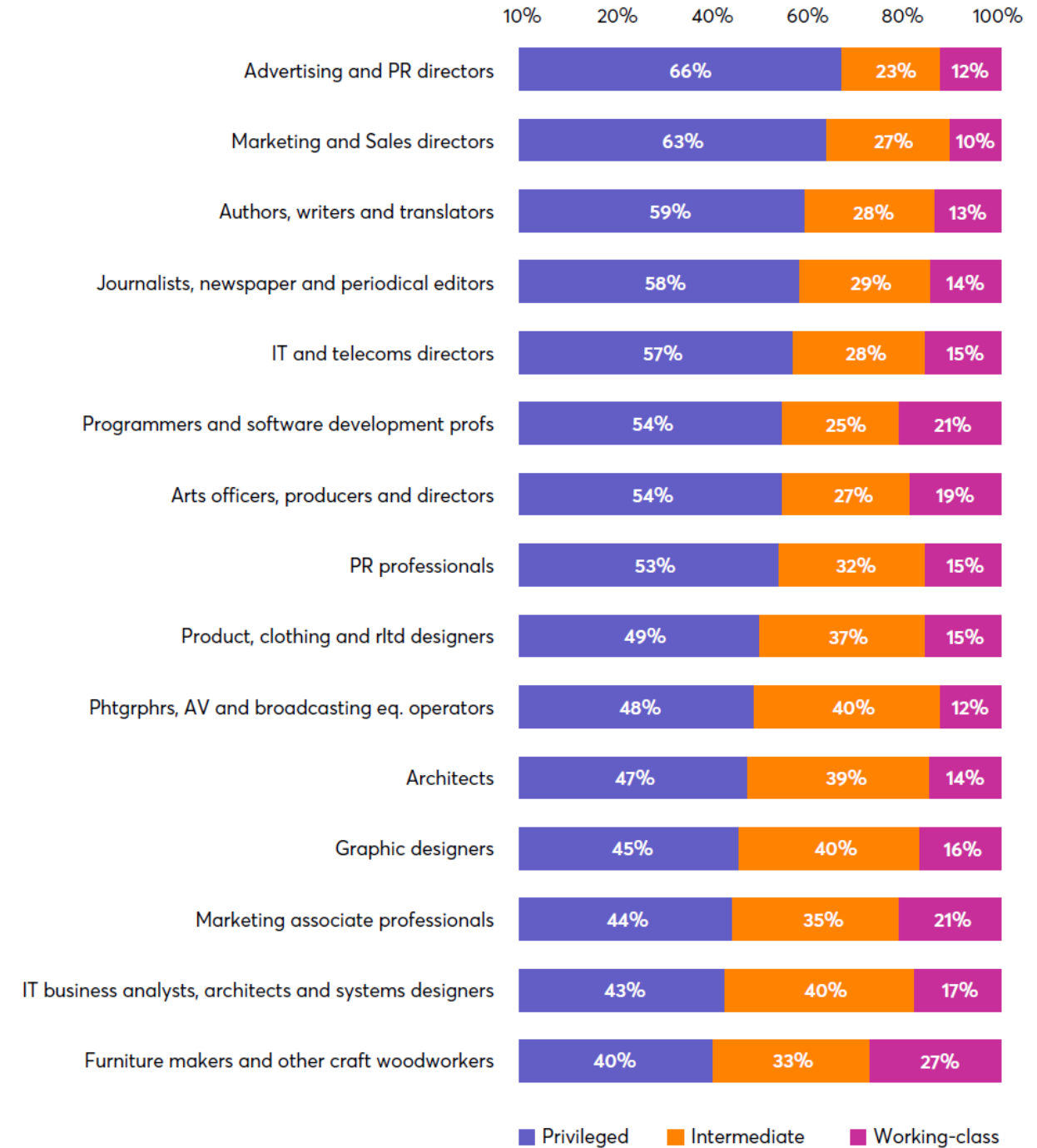
How:

- We explored class composition in the workforce and select measures of job quality, using the Labour Force Survey
- We explored additional measures of job quality, retention and progression, using the longitudinal survey Understanding Society waves from 2009-17
- We used parental occupation at 14 to derive NSSEC categories to differentiate three class backgrounds: privileged, intermediate and working class

Class in the CIs: 5 key facts

1. There are widespread & persistent class imbalances in the Creative Industries

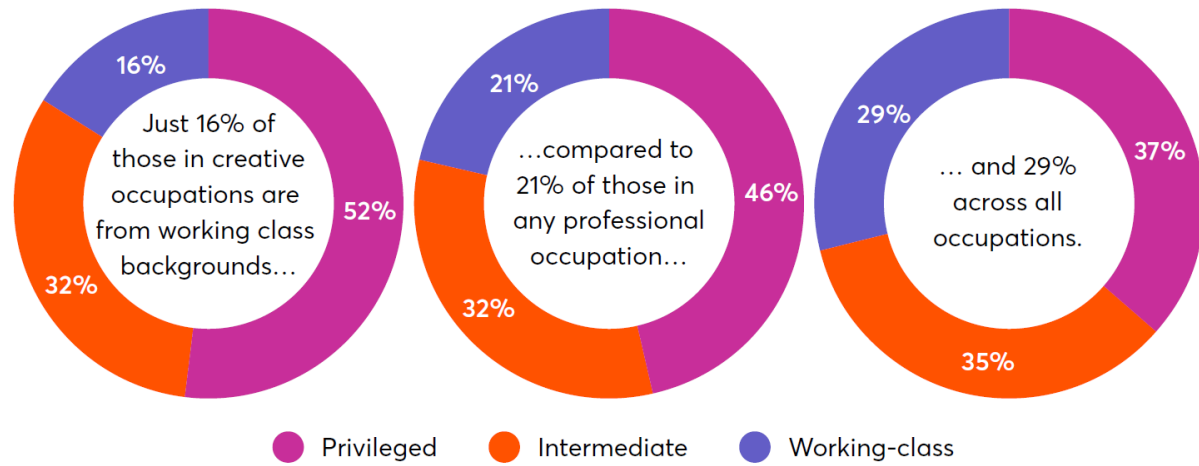
2. Those from privileged backgrounds dominate key creative roles



Creative occupations²

Professional occupations³

All occupations



Just 16% of those in creative occupations are from working class backgrounds...

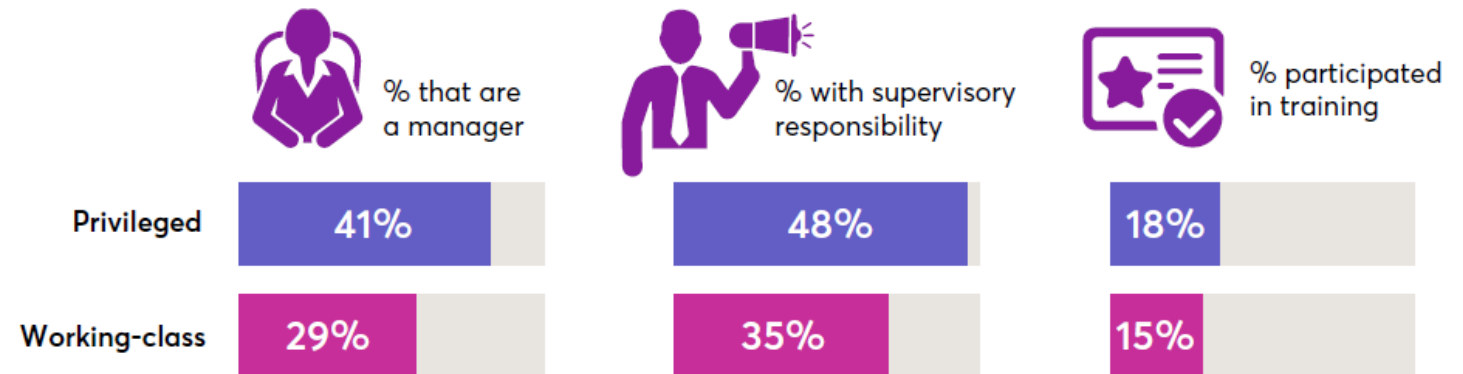
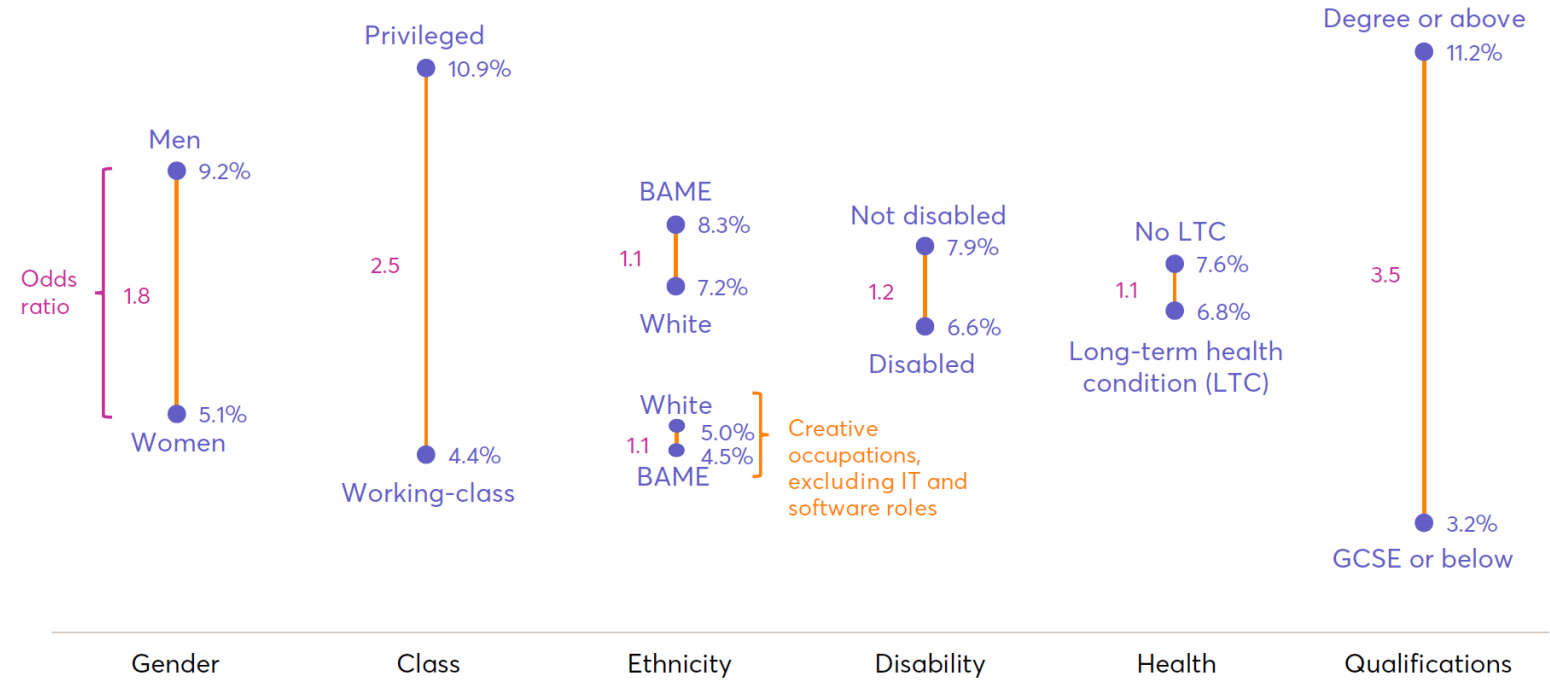
...compared to 21% of those in any professional occupation...

... and 29% across all occupations.

3. Class isn't the only factor at play & interacts with other characteristics – such as gender, ethnicity, disability and skill levels – to create 'double disadvantage'

4. Those from working-class backgrounds also experience differences in job quality & progression

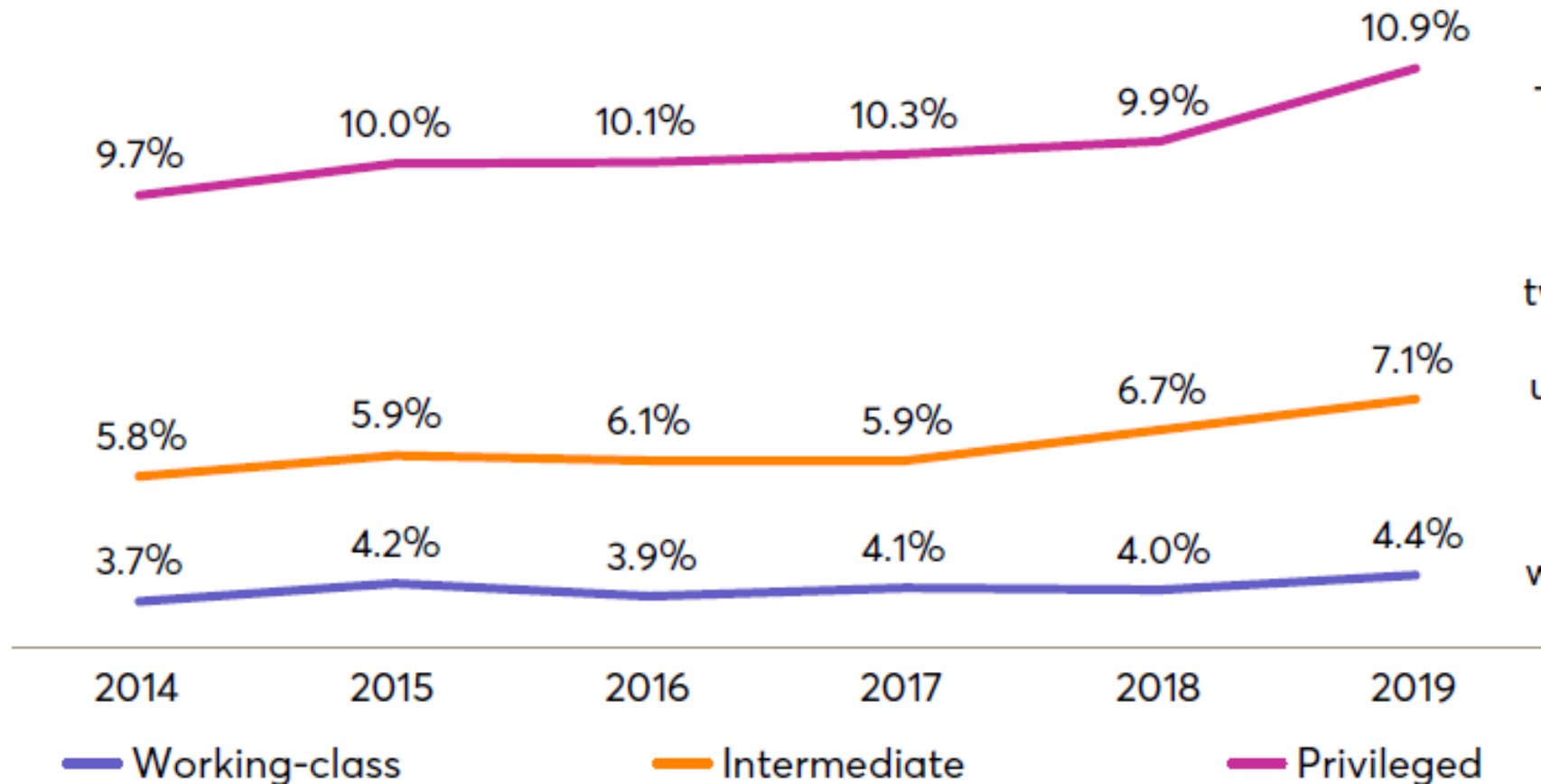
Odds and odds ratios of being employed in creative occupations, 2019



5. Despite growing awareness & action, the likelihood of someone from a working-class background finding work in a creative occupation has remained largely unchanged

2014

Those from a privileged background more than twice as likely (2.60) to end up working in creative occupations than the working-class



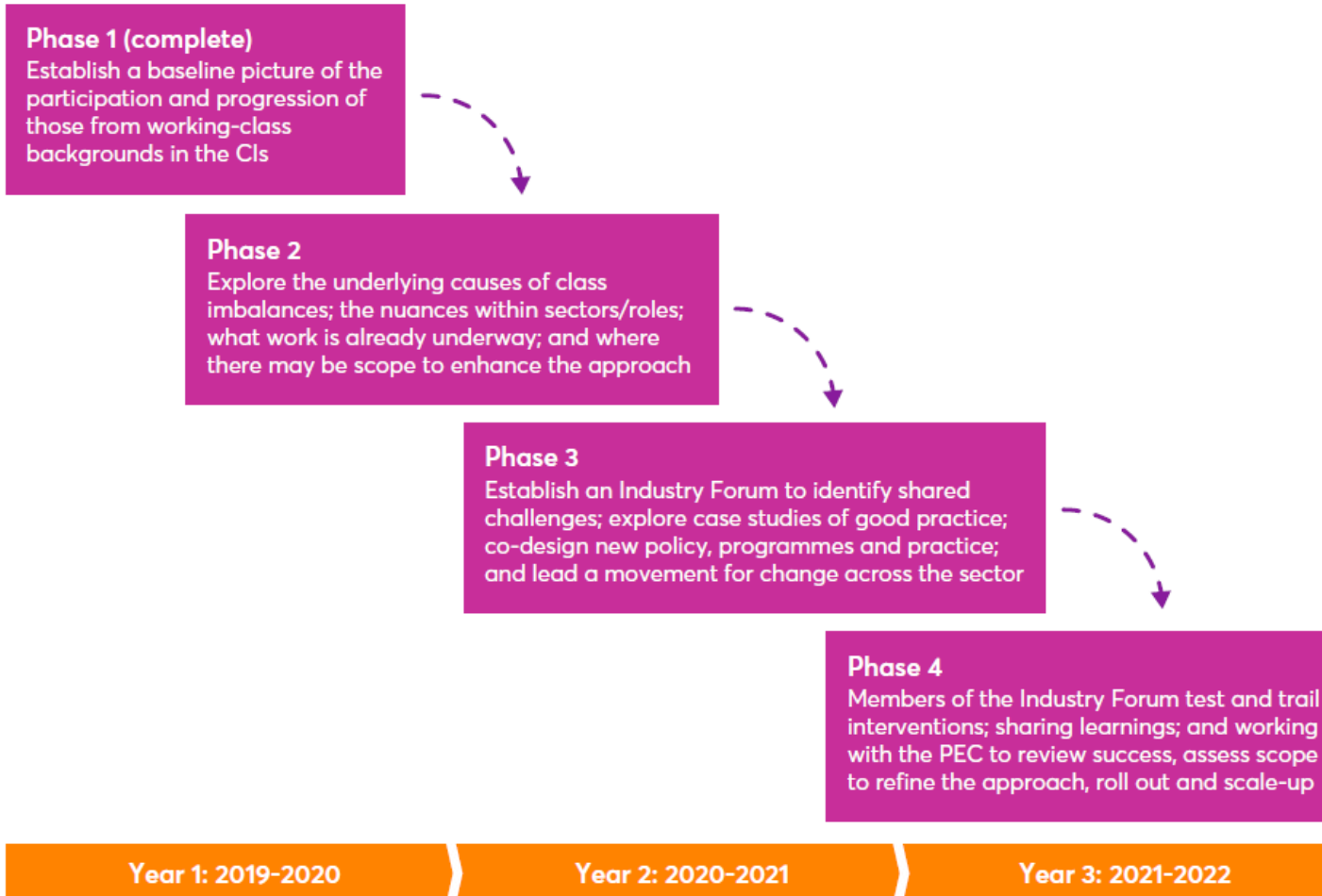
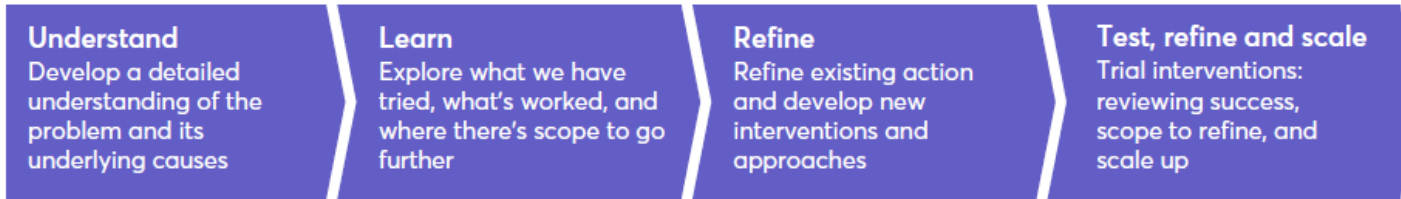
2019

Those from a privileged background more than twice as likely (2.49) to end up working in creative occupations than the working-class

Creative Industries

Policy & Evidence Centre Led by **nesta**

So what started with data is now... PEC Class and Social Mobility in the UK Creative industries programme



Phase 2 of the programme will:

1. Establish a clear & coherent narrative of the underlying causes of class imbalances
2. Consider the nuances, in 4 key parts of the CIs: screen, publishing, advertising and Fashion
3. Review current policy, programmes & practice, identify how we can more effectively shift the dial on diversity

Any questions for our speakers?



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Andrew Young
Diversity Lead,
Workforce
BBC



Heather Carey
Director
Work Advance



Cliff Sale
Social Mobility
Programme Lead,
HMRC



Abeda Malek
Statistician
HMRC

**EMPLOYER
INDEX
—2021**

**S_CIAL
M_OBILITY
F_UNDATION®**

Social Mobility Employers Masterclass 2021 Series: Data
Mareen Birresborn, Senior Employer Relations Officer and Index Lead

TOP 75 — Social Mobility Employer Index 2020

01	PwC
02	Grant Thornton
03	KPMG UK LLP
04	Bryan Cave Leighton Paisner
05	Browne Jacobson
06	Ministry of Justice
07	Herbert Smith Freehills LLP
08	Severn Trent
09	JLL
10	Baker McKenzie
11	Linklaters LLP
12	Ministry of Housing, Communities & Local Government
13	Aviva plc
14	Department for Work and Pensions
15	Department for Education

16	Enterprise Rent-A-Car
17	Civil Service Fast Stream and Early Talent
18	Department for Business, Energy & Industrial Strategy
19	Freshfields Bruckhaus Deringer LLP
20	Hogan Lovells International LLP
21	BBC
22	Accenture
23	Penguin Random House UK
24	Brodies LLP
25	Slaughter and May
26	Santander UK plc
27	Financial Conduct Authority
28	Allen & Overy
29	Ministry of Defence
30	Pinsent Masons

31	Teach First Training Programme
32	Bank of England
33	Capgemini UK
34	Government Legal Department
35	RPC LLP
36	Wellcome
37	Foreign and Commonwealth Office
38	Shoosmiths
39	Burges Salmon LLP
40	DWF
41	CMS
42	Legal & General
43	Fujitsu
44	HM Revenue & Customs
45	Mears Group Plc

46	Squire Patton Boggs
47	House of Lords
48	The British Land Company PLC
49	HM Treasury
50	City of London Corporation
51	Freeths LLP
52	Shepherd and Wedderburn
53	The Honourable Society of the Inner Temple
54	House of Commons and Parliamentary Digital Service
55	Crown Prosecution Service
56	FDM Group
57	Simmons & Simmons LLP
58	The Co-op
59	Lewis Silkin LLP
60	Macquarie Group

61	Radcliffe Chambers
62	Department for Digital, Culture, Media & Sport
63	The Home Office
64	Bank of America
65	Goldman Sachs
66	Mayer Brown International LLP
67	Macfarlanes LLP
68	TLT LLP
69	HarperCollins Publishers UK
70	Department for Transport
71	Schroders
72	Charles Russell Speechlys LLP
73	M&G plc
74	Superdrug & Savers
75	MUFG

Why take part in the Social Mobility Employer Index?

It's free of charge, you can enter anonymously and your organisation will receive a comprehensive audit

- Many organisations have found it useful in forming their social mobility strategy or monitoring the progress of their existing work

Clients care about social mobility

- 86% of last year's entrants said that their clients care about the socioeconomic background of their workforce

Be a trailblazer for diversity and social mobility

- If you join, others will follow and take action

To find the UK's best talent

- Taking part in the Index is a great way to find out if your recruitment approach is getting you the best available talent

How it works: the process

- Submissions are open now and close on **28th May**
- Over the **summer** we mark the responses and benchmark submissions
- In **September/October** you will receive a **tailored feedback report** detailing how your organisation performed in each section and the offer of a meeting to discuss the findings
- We announce the Top 75 and a key findings report in **October/November**

The SMF is on hand to help



Joining the 2021 Index

Register your interest in joining
the Social Mobility Employer Index 2021:

socialmobility.org.uk/index/

employerindex@socialmobility.org.uk

Timeline

- **March 2021**
 - Employer Index and Employee Survey open
 -
 -
 -
- **May 2021**
 - Submissions close
 -
 -
- **Autumn 2021**
 - Individual feedback reports sent to employers
 - Top 75 and key findings report published









Dates for your diary

The UK Social Mobility Awards are opening for entries soon.

UK Social Mobility Awards™

- Over 500 entries from across the UK, from a range of sectors 12 categories to enter
- Independent judging panel of leading figures from business and other sectors

 April 21st SOCIAL MOBILITY BUSINESS SEMINAR	 April 26th NOMINATIONS OPEN	 June 25th ENTRY DEADLINE
 July 12th SHORTLIST ANNOUNCED	 July/August JUDGING	 October 14th AWARDS NIGHT

[UK Social Mobility Awards](#)



Social Mobility
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Masterclass: Progression

Thursday April 22nd 2-3:30pm

Register Now



Cabinet Office



@SMCommission



Social Mobility Commission



@socialmobilitystories

#socialmobility #GettingInGettingOn www.socialmobilityworks.org