



Social Mobility
Commission

Masterclass: Data

Insights to drive your decisions and interventions

2:00pm – 3:30pm 3 December 2020



@SMCommission



Social Mobility Commission



@socialmobilitystories

#Socialmobility www.socialmobilityworks.org



Your data review and refine checklist (1/3)

This document has been designed using the ideas that were generated in our masterclass. 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)

This document has been designed using the ideas that were generated in our masterclass. 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 Influence their 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)

This document has been designed using the ideas that were generated in our masterclass. 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			Action	Due Date
		Nothing/Not something you currently do	Do something in this space but limited	Actively do this		
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!

What is social mobility?

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.**

Why we are changing our guidance..... and what did we do?



Endorsed by our partners:



The key question

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



Already using the original
four-part question?

Keep it.

The single question is great
for those new to the
agenda or like things
simple. Also great for
supplementary surveys

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 more than a year).

exclude

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

Want to be among the best?



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To optimise your practices

Ask two further questions to get to the next level, alongside the key question



Question 2

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

What has changed?

Added a new category for those who received a full bursary to attend independent schools*.

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?

What has changed? – Nothing!

Why ask?

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



Question 4 is optional and is 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?

How do you drive up response rates?



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**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



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You have your data... now what?



Next steps to assess your workforce diversity

The Key Question

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



Analyse as groups:

- Professional backgrounds
- Intermediate backgrounds
- Lower socio-economic backgrounds



- Is it equal, or unequal?
- Which is the dominant socio-economic group?
- Compare the proportion of applicants and staff members from each socio-economic background.



If your business is not fairly represented:



- Share data internally
- Develop a strategy
- Use interventions
- Visit www.socialmobilityworks.org for best practice and case studies.



Compare against national benchmarks



Want to lead best practice?

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

National benchmarks*

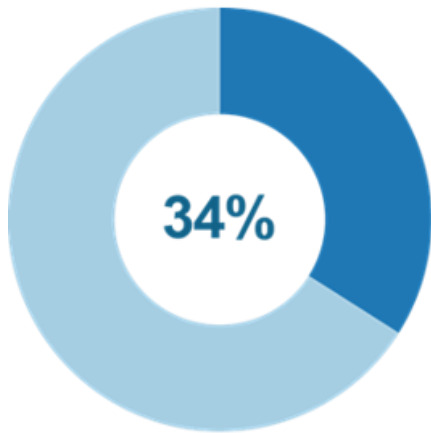


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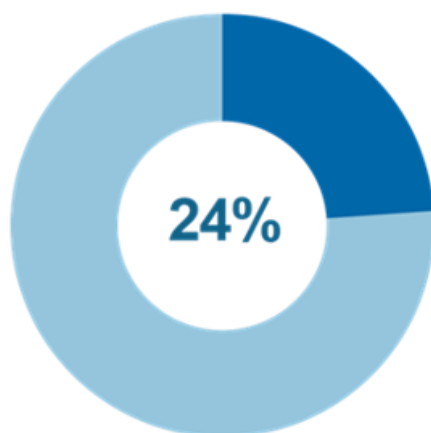


The key question – parental occupation at age 14

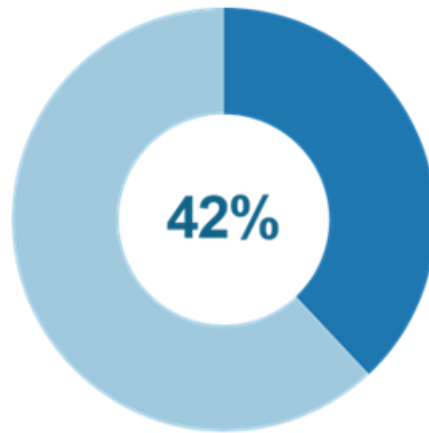
Professional



Intermediate



Working class



Type of school attended at
age 11–16



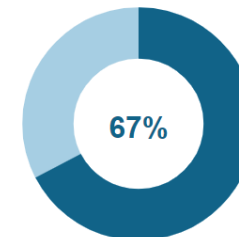
7.5% Independent schools



Free school meal eligibility



15% Pupils at state-funded schools



of graduates are first in
family to attend uni

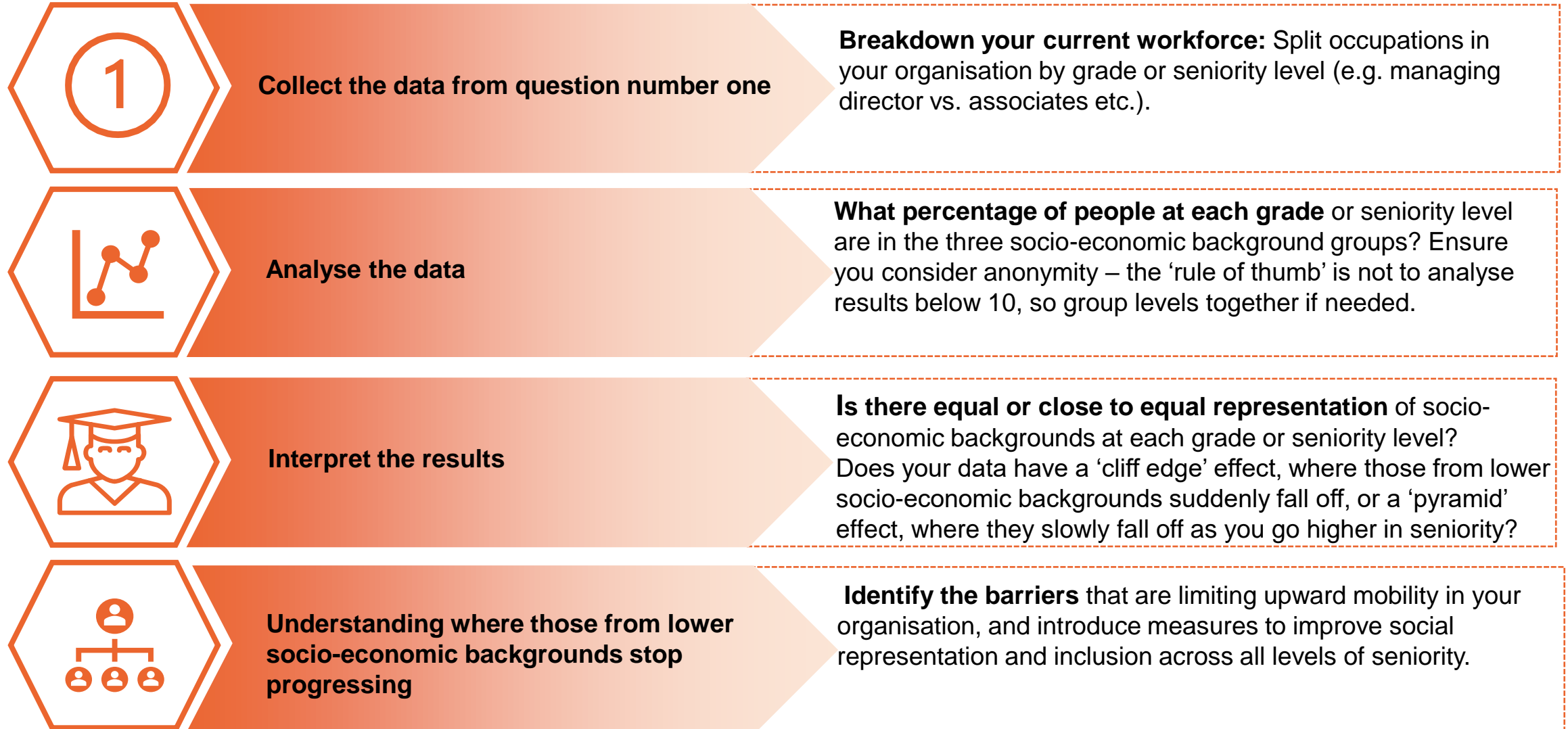
*Some industry benchmarks will also become available on our site as we release industry-specific toolkits

Using data to assess progression



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Talented individuals from lower socio-economic backgrounds are often overlooked when it comes to moving up.



Then use it to assess apprenticeships



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Talented individuals from lower socio-economic backgrounds are often overlooked when it comes to moving up.



Get the overall picture

Analyse your overall apprenticeship and training makeup 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?



Access by level

Look at the percentage of learners who have **completed apprenticeships** by socio-economic background.



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 new tool for mature organisations to track progress

The scorecard

- To help you measure your progress, we have developed a **scorecard** with set targets for key D&I interventions – outreach, hiring, progression, culture & leadership, advocacy and data.
- The targets have been set using data collected by the Social Mobility Foundation through their Social Mobility Employer Index (SMEI).
- The scorecard will help you measure progress against set targets, drive constant improvements and give structure to your efforts.

[Download the score card here](#)

Data

Understand the current situation; inform activities; evaluate change

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%



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**Now let's hear from the
guest speakers**

Presenters



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James King
Head of Reward &
Projects
Compass Group UK &
Ireland



Laura Yeates
Head of Graduate
Talent
Clifford Chance LLP



Andrew Young
Diversity Lead,
Workforce
BBC



Philip Wilson
Head of Assessment
and Diversity
Fast stream, Cabinet
Office

Compass Group's story



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The social mobility basics

The need to understand more

Next steps



Known as providing opportunities for all -
No qualification barriers
Development at all levels



Career pathways

Apprenticeships

Real Living Wage



External partnerships
Springboard

Listening to our D&I inclusion groups



Social Mobility Pledge –
Case studies & anecdotal evidence
How widespread is the impact?



Progression paths not clear for small units

Equal progression does not seem to appear at all levels in all groups



Employer survey to ask D&I questions including social mobility (Feb 2021)



Analysis of the data – drive further interventions

BBC D&I Data journey

Initially

Next

Now

Going Forward

Early career

Started collecting
socioeconomic data

Analysing data

Continue data
collection

New ways of recruiting

Integrated qualitative
and quantitative data

Informing interventions

Review questions

Improving inclusion

Culture and behaviours

Next census January
2021

Partnered with Bridge
Group

Data informs strategy
on D&I and social
mobility

Culture and career
progression feature on
website

Clifford Chance's data usage



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Collected Data
since 2014



Two data sets;
Entry and
Progression



Data has informed
interventions and helped
to test **hypotheses**

External Data
Support



Identified
barriers in
recruitment
process and
progression



Data collection
supports the
business case for
interventions

C L I F F O R D
C H A N C E

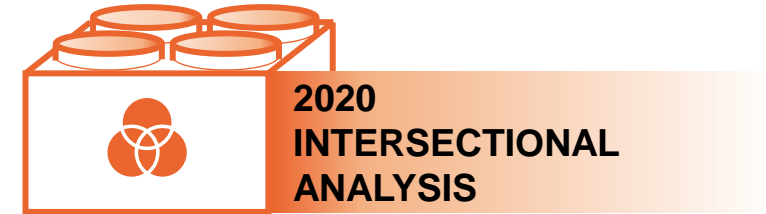
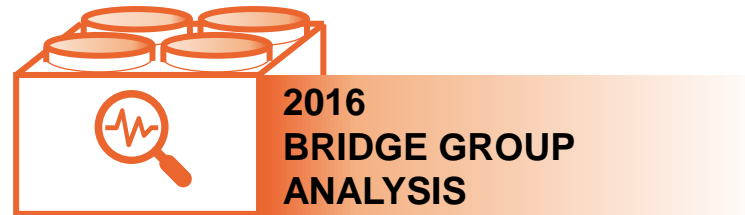
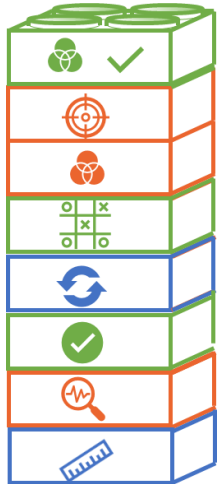
Fast Stream's construction of evidence




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Civil Service
Fast Stream &
Early Talent



 Data/measurement

 Analysis

 Activity

Data collection and manipulation



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Nicholas Miller
Chief Executive
Bridge Group



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research
action
equality

Social Mobility Employers Masterclass Series: Data

3 December 2020

What's the point?

- > To understand what is happening
- > To inform action
- > To benchmark progress
- > To understand what is effective
- > Bust some myths

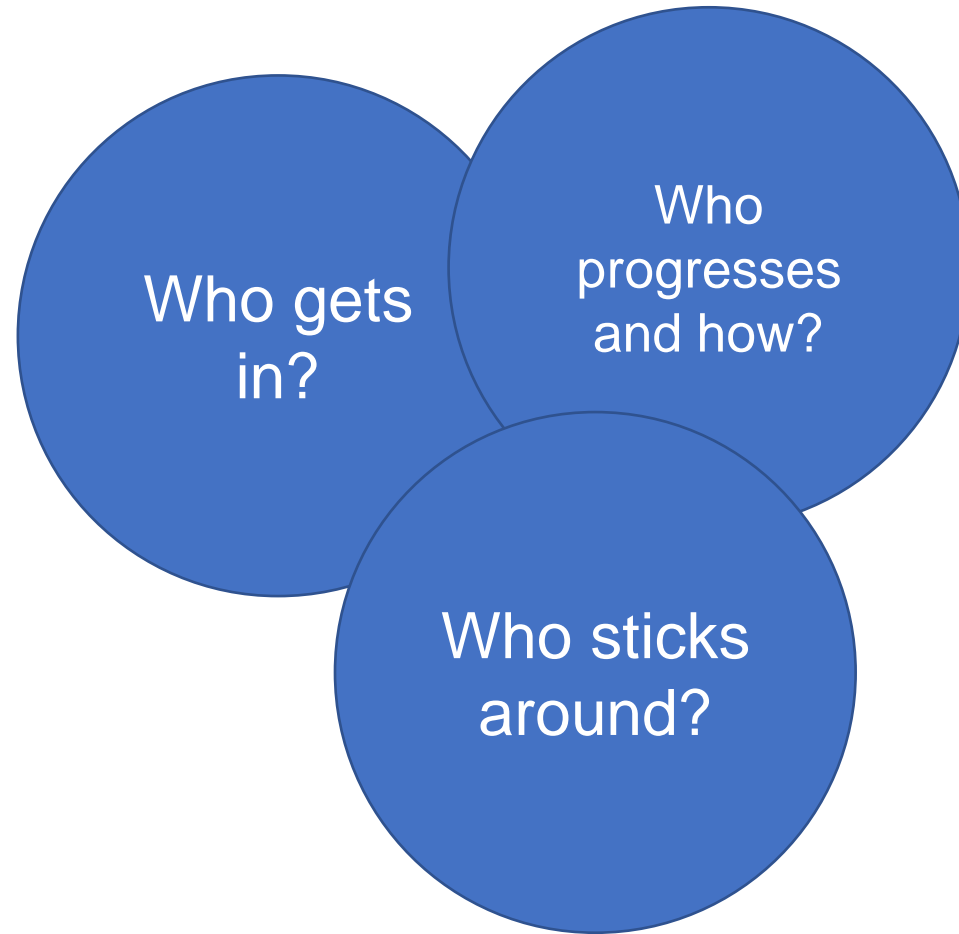


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Questions

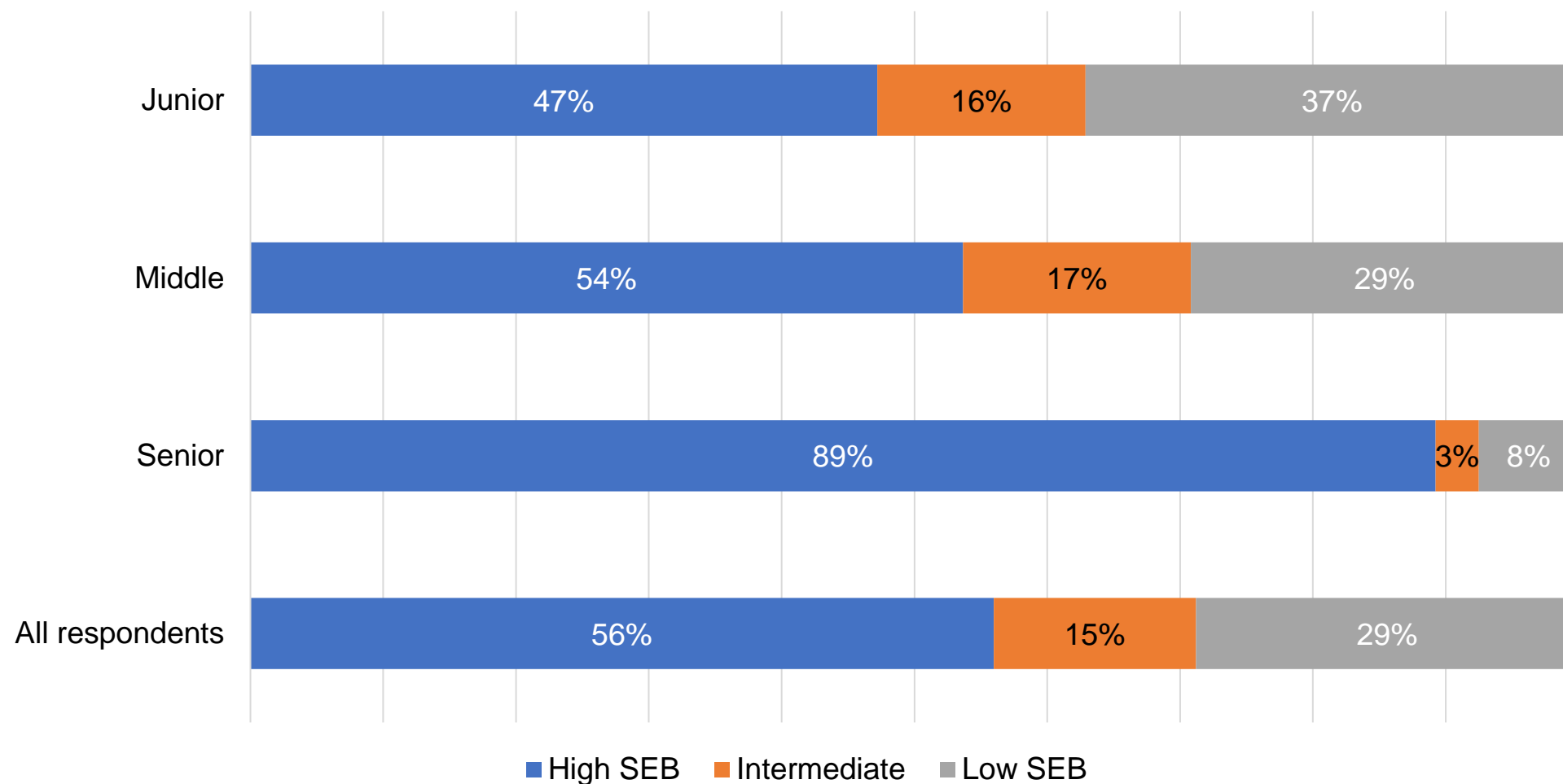
- > How diverse is our organisation by socio-economic background (SEB)?
 - > Horizontally (by area)
 - > Vertically (by seniority)
-
- > Benchmarked against time and other relevant datapoints
 - > All considered in the context of other diversity characteristics



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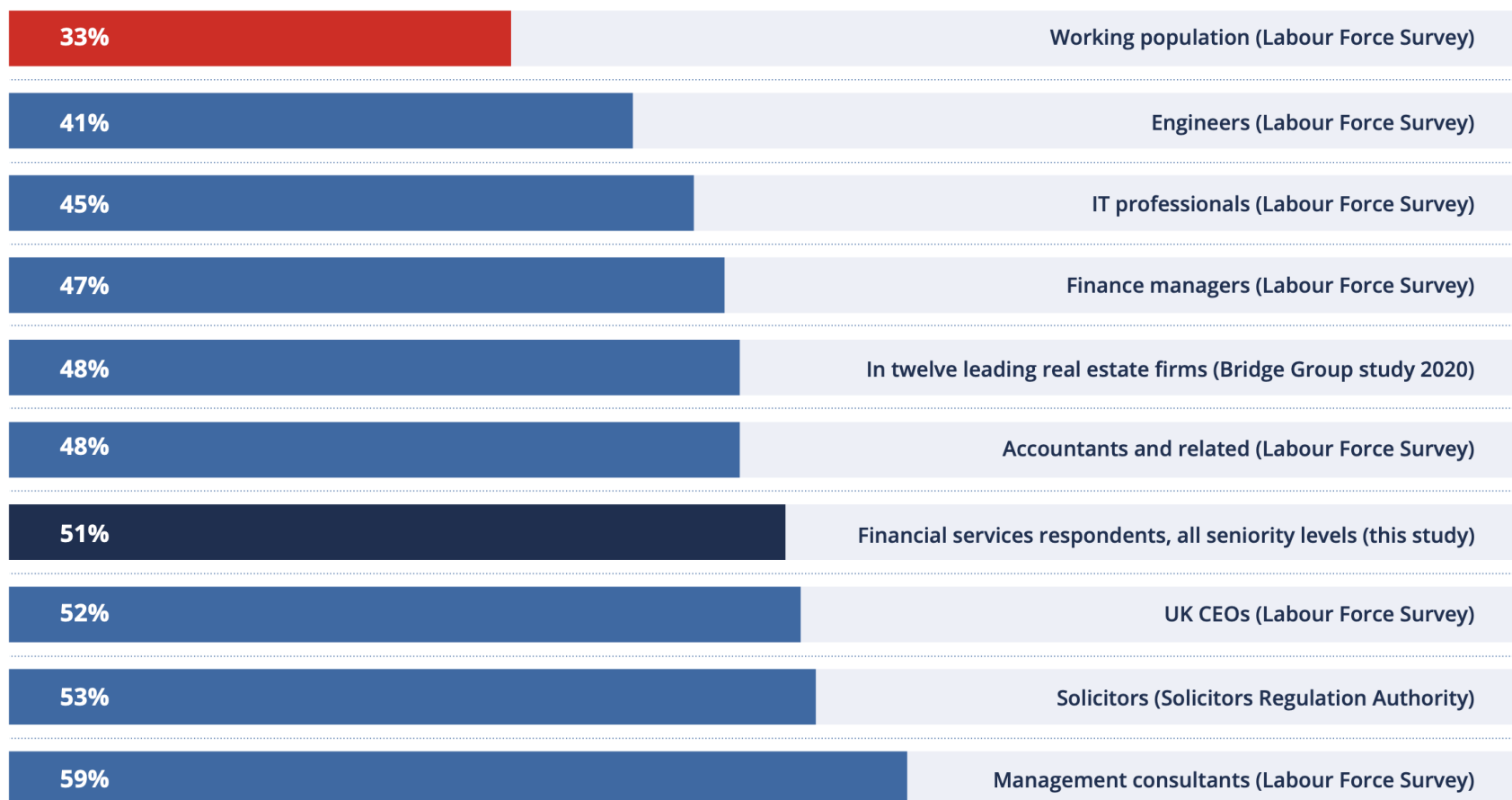
> How diverse is our organisation by socio-economic background (SEB)?



> How diverse is our organisation by socio-economic background (SEB)?

29

In aggregate, respondents across finance firms are unrepresentative by socio-economic background (% from a higher socio-economic background by parental occupation)



Bridge Group Financial Services [Report](#) (2020)



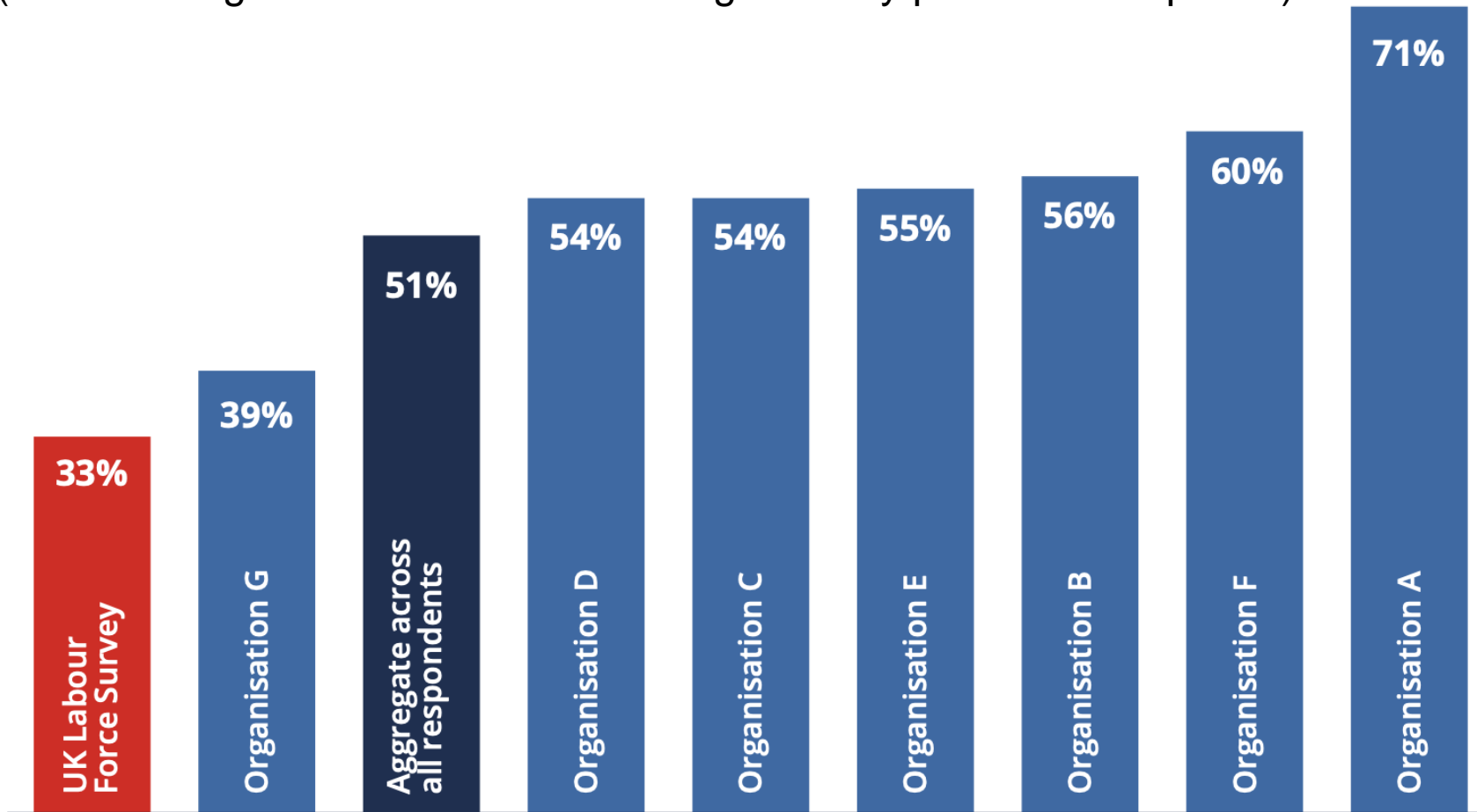
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> How diverse is our organisation by socio-economic background (SEB)?

These proportions vary significantly by organisation

(% from a higher socio-economic background by parental occupation)



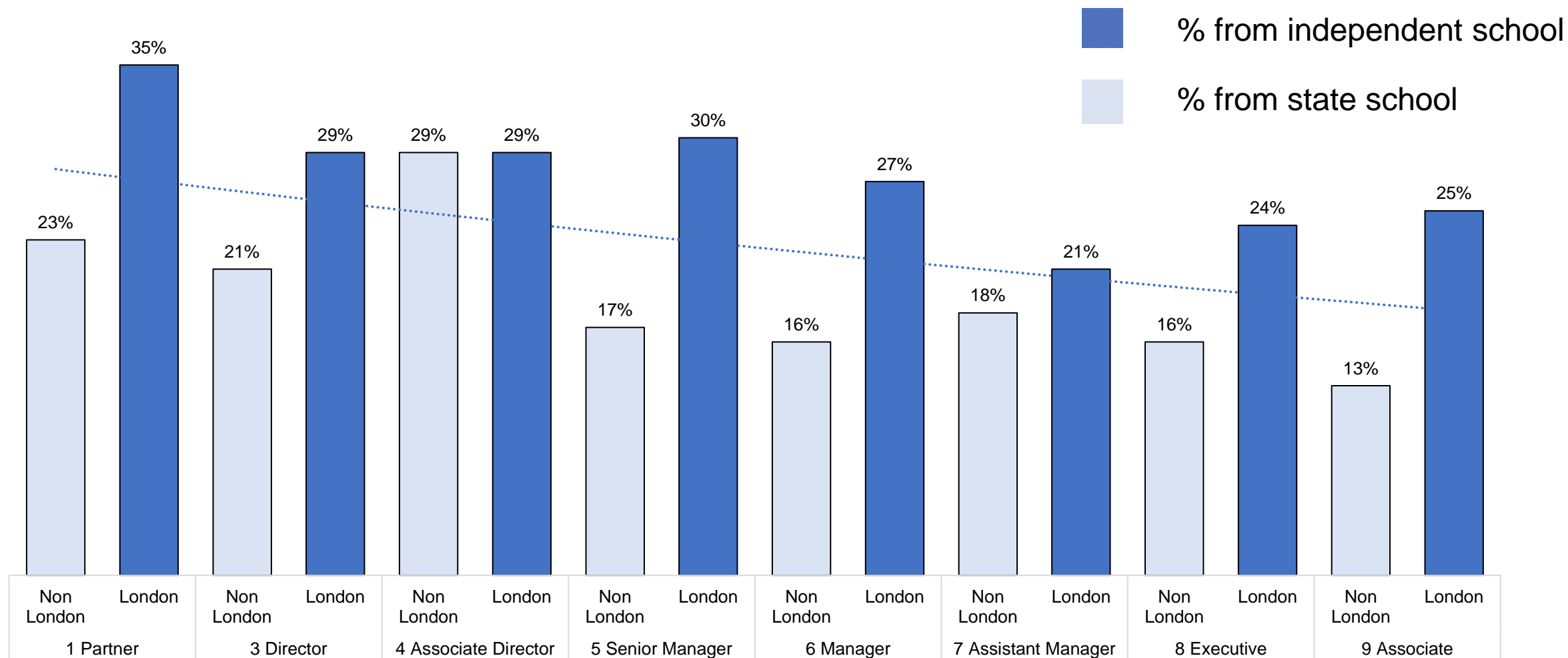
Bridge Group Financial Services [Report](#) (2020)



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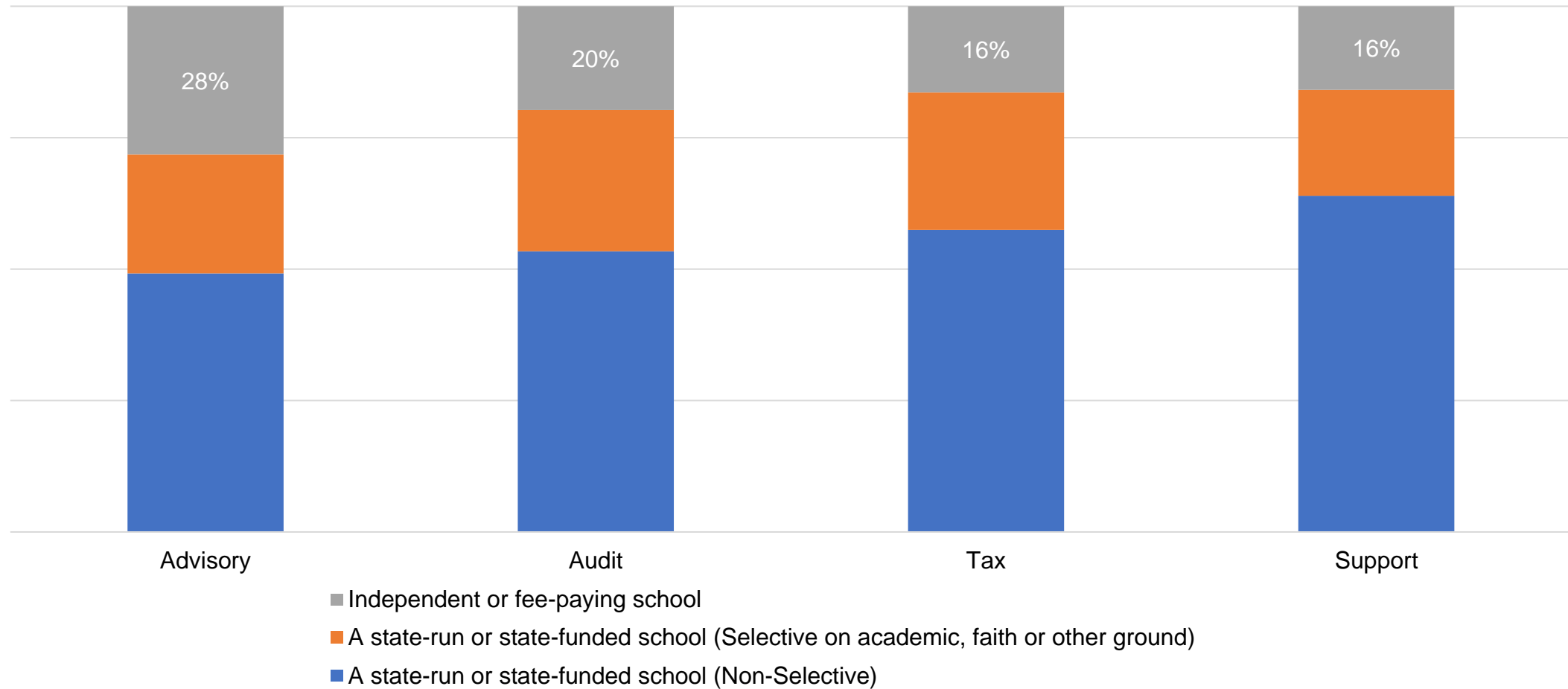
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> How diverse is our organisation by socio-economic background (SEB)?



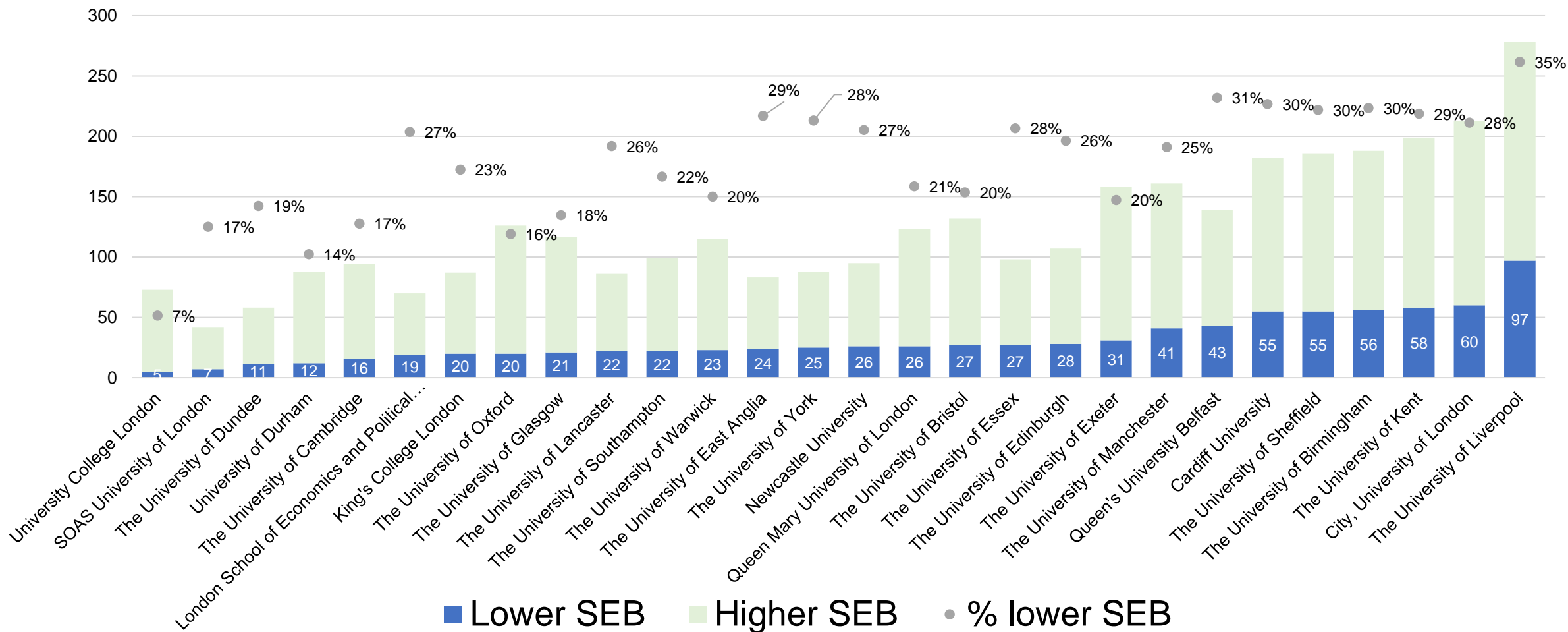
Large accountancy firm (anonymous – 2019)

> How diverse is our organisation by socio-economic background (SEB)?



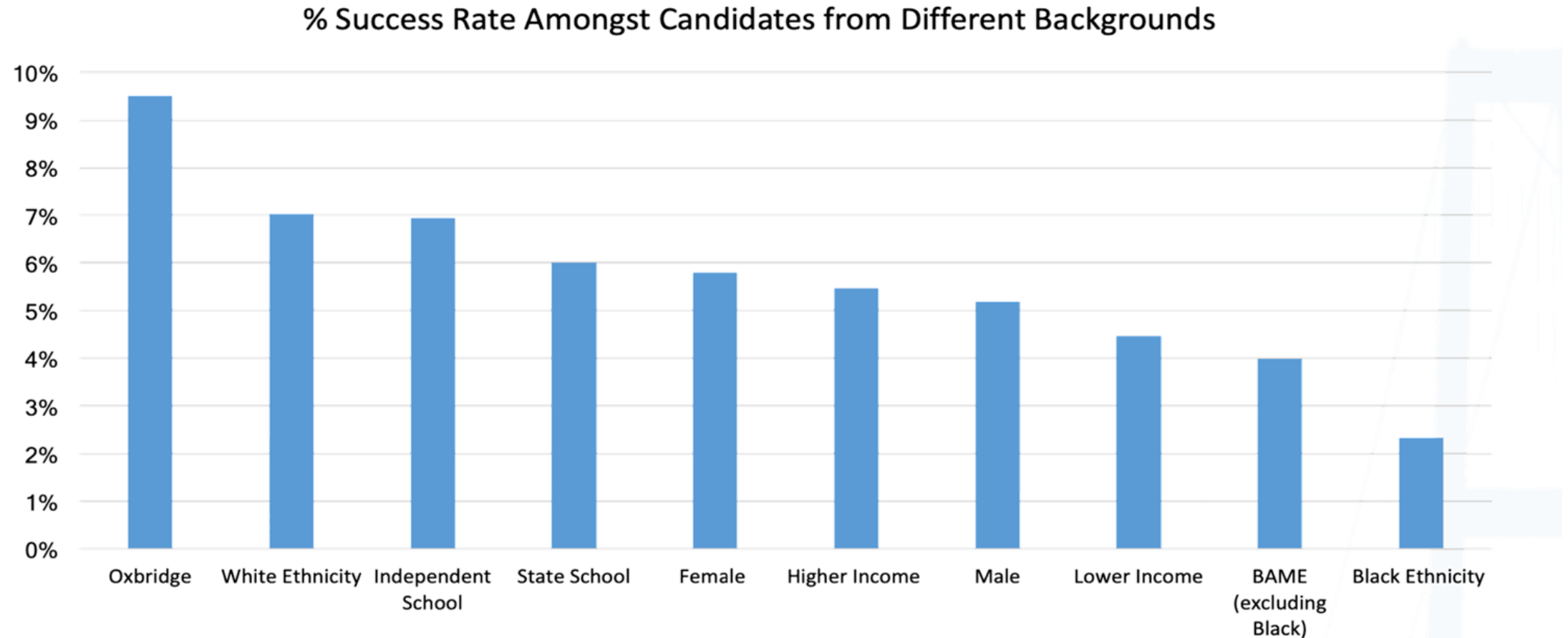
Large accountancy firm (anonymous – 2019)

> Who gets in? Attraction



HESA (2019)

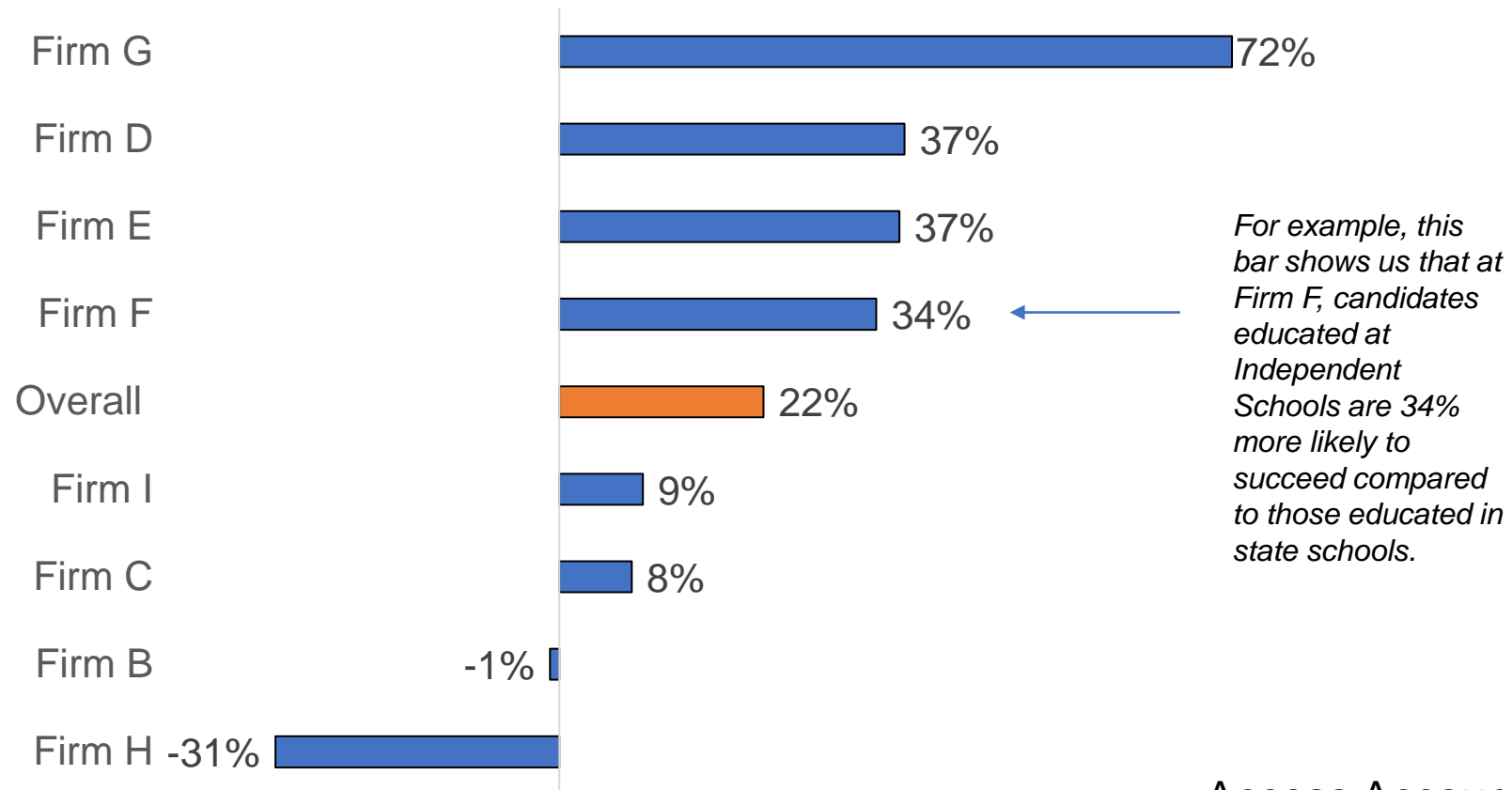
> Who gets in? Success rates



> Who gets in? Success rates

Success Ratio by Firm : Independent vs State

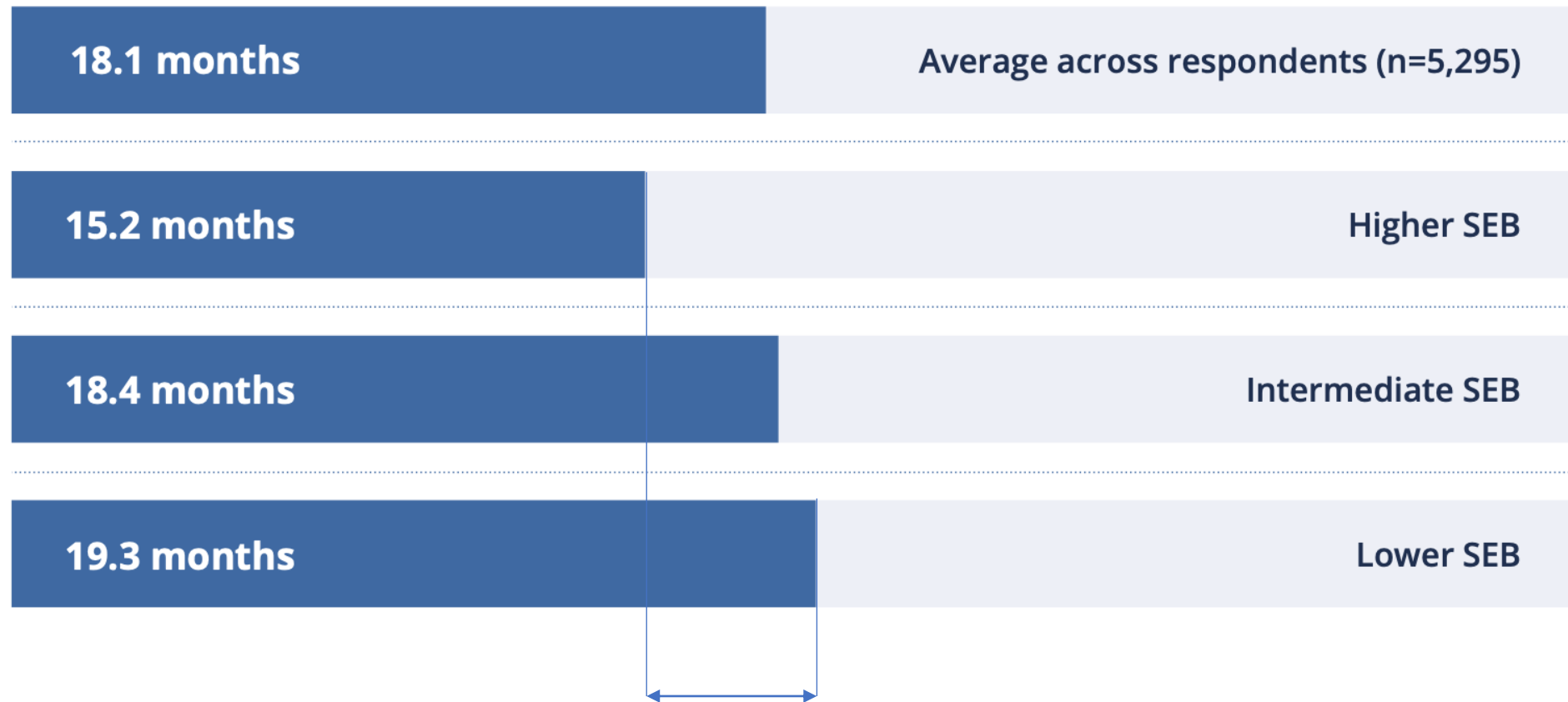
(Firm A removed because dataset too small or data not provided)



> Who progresses?

36

Employees from lower socio-economic backgrounds take longer to progress through grades, despite finding no evidence that links this with job performance.



Progression gap of 25%

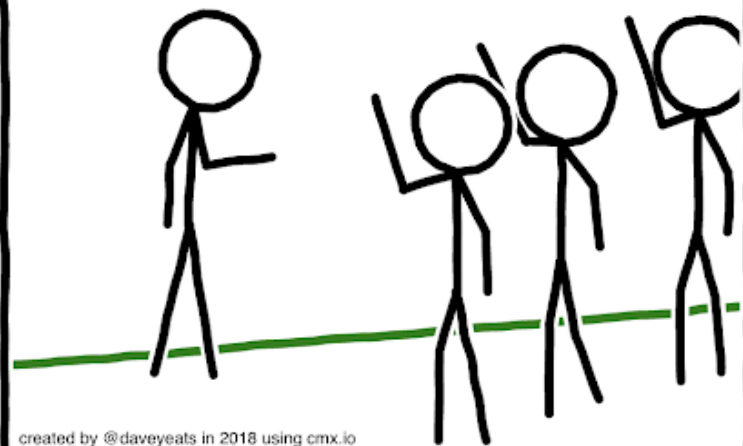
- > What does good look like?
 - > Consistency of data types
 - > Capability to map datasets - often an infrastructural / IT matter
 - > Benchmark and contextualising – understand external data
 - > Ask the right questions of the data – focus and apply the right analysis
 - > Use the answers to inform change and evaluate progress – analysis to intelligence to action
 - > Transparency and collaboration

- > Response rates
 - > What it will not be used for
 - > Strategically connected and relevant
 - > Continuous process, you can mandate it
 - > Engage middle / team managers
 - > Relevance of questions

COUNTING THINGS

LET'S GET A SHOW OF HANDS...

WHO HERE PREFERS
QUANTITATIVE DATA
OVER QUALITATIVE DATA?

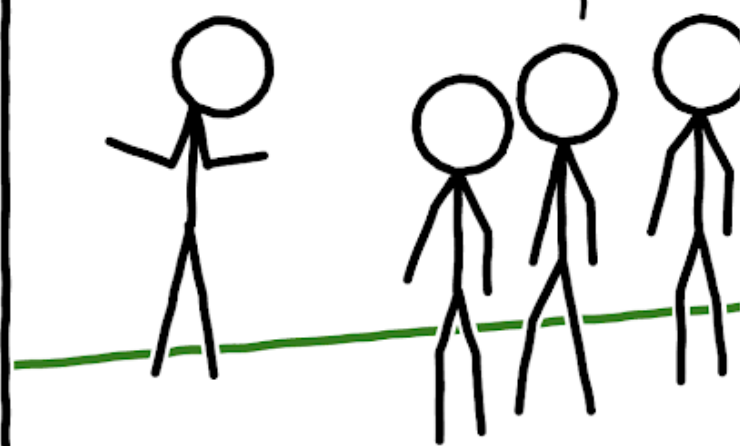


created by @daveyeats in 2018 using cmx.io

1...2...3...

OK! LOOKS LIKE EVERYBODY!
TELL ME, WHY DO
YOU PREFER QUANT?

WELL, QUANT DATA IS
THE ONLY WAY TO
REALLY KNOW...

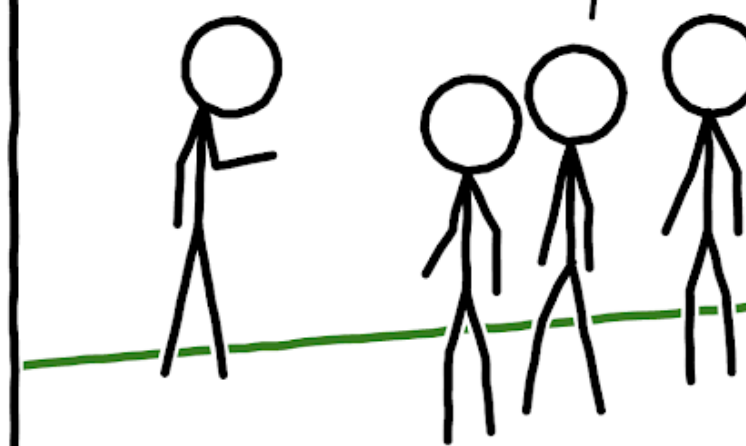


OH, SORRY...

I SHOULD HAVE MENTIONED.
PLEASE ONLY USE NUMBERS
IN YOUR RESPONSE.

PAUSE

SEVEN?





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Insights to drive your decisions and interventions

2:00pm – 3:30pm 3 December 2020



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