



invested  
in people

# Inclusion & Belonging Strategy 2025



onefamily

# Why focus on Inclusion & Belonging?

We launched our **Invested EVP in 2023**, with the promise to create a dynamic, collaborative & inclusive culture at OneFamily; supported by a corporate objective to create and enable a Courageous, Principled and Effective team.

To deliver these ambitions it is imperative that we have a clearly defined Inclusion & Belonging strategy, alongside an action-oriented Inclusion & Belonging plan and Charter that we are held accountable for.

**Inclusion and Belonging** need to be fostered and embedded throughout the whole employee lifecycle



Underpinned by an environment where all colleagues feel **psychologically safe**



# Inclusion & Belonging Strategy

Our organisation is made up of brilliant people. Each of us is unique, whether in terms of our background, personal characteristics, experience, skills, or motivations. And we value our people for the differences they bring to the table. **These differences - this diversity - is powerful.**

Fostering an inclusive culture helps each of us to benefit from a wider range of these different perspectives, experiences, and skills.

The steps that we are taking in 2025 and beyond will help us to understand more about the OneFamily community, with the aim to drive Inclusion for our colleagues, customers and local communities. We believe that this will create a happier, more productive working environment for us all and drive positive outcomes.

Our Strategy is simple, we aim to Celebrate, Educate and Increase Visibility:

- We will **celebrate** the diverse colleagues who work with us, their uniqueness and their achievements, and we will recognise celebration days and holidays that are important to our colleagues and customers.
- We will **educate** Colleagues, Managers and Leaders so that we build respect and trust, remove unconscious bias across the whole employee lifecycle and create an inclusive, psychologically safe culture, providing all colleagues with equitable opportunity to develop and progress here.
- We will **gain visibility** of the diversity in the OneFamily community by collecting voluntary data from colleagues to drive future actions, and through our employee networks and celebrations, we will **provide visibility**, so colleagues can see peers and role models who they have something in common with.

# Celebrate

## Our Goal:

We will **celebrate** the diverse colleagues who work with us, their uniqueness and their achievements, and we will recognise celebration days and holidays that are important to our colleagues and customers.

### To achieve this in 2025,

- Our employee networks will recognise and celebrate dates in the DEI calendar, such as Black History Month, LGBTQ+ history Month, Pride and Neurodiversity awareness week, hosting and organising events and activities to celebrate and raise awareness
- Our Employee networks will work together to promote and celebrate the diversity and intersectionality of our colleagues
- We will celebrate our colleagues' achievements at the Annual Values Awards, where nominations are open to all, and staff are nominated by their colleagues and managers for their Courageous, Effective and Principled behaviour

### What's next:

- We will nominate ourselves for external industry DEI awards – recognising our achievements and commitment to DEI
- We will be visible in our communities, promoting and participating in celebrations and events that recognise the diversity of local people, colleagues and members

### We'll know we've succeeded when

- We receive values award nominations for at least 25% of the OneFamily Population
- We are shortlisted, or win industry DEI awards

# Educate

## Our Goal:

We will **educate** colleagues, Managers and leaders so that we build respect and trust, remove unconscious bias across the whole employee lifecycle and create an inclusive, psychologically safe culture. Providing all colleagues with equitable opportunity to develop and progress here.

## To achieve this in 2025

- We will continue to provide, monitor and report on the completion of DEI & Unconscious bias eLearning by all new and existing colleagues
- We will review and update policies regularly to ensure all colleagues are clear on their responsibilities and accountabilities and how they are supported throughout various life milestones
- We will provide relevant and appropriate training and development opportunities for all colleagues with the introduction of the career mapping framework and manager development programmes.
- We will make significant progress towards achieving Disability Confident Leaders status – identifying improvement areas and addressing these, initially:
  - We will review and update recruitment and onboarding processes to enable a fully inclusive experience, ensuring recruiting managers have the tools to support an inclusive, accessible, and fair recruitment process

## What's next:

- We will continue to identify improvements; environmental, cultural and behavioural that will enable a successful Disability Confident Leader assessment
- We will look externally and partner with organisations and support charities to drive inclusion in our local communities – with a specific focus on social mobility
- Financial education is a priority for our customer, members and colleagues, we will look to provide products, tools and resources to inspire and enable better futures

## We'll know we've succeeded when

- We achieve Disability Confident Leader Status

# Visibility

## Our Goal:

We will **gain visibility** of the diversity in the OneFamily community by collecting voluntary data from colleagues to drive future actions, and through our employee networks and celebrations, we will **provide visibility**, so colleagues can see peers and role models who they have something in common with.

## To achieve this in 2025

- In April we will encourage colleagues to provide us with their EDI data on CIPHR, as part of Diversity Awareness month, providing clear explanation of how we will use this information to drive future actions and ensure an inclusive and equitable employee experience.
- We will publish our commitment to EDI and the targets we have set for ourself; Women in Finance charter, progress towards Disability Confident Leader status and the success of our involvement in the 10K Black Intern programme
- Our networks will host events, tell stories and publish educational and celebratory content
- We will publish our OneFamily EDI Strategy and Charter (Internally & externally)

## What's next:

- We publish the steps that we are taking towards becoming a Disability Confident Leader, on route to submitting assessment
- Reverse mentoring programme to be established, providing the exec and leadership with a view of employee experience and a forum for change

## We'll know we've succeeded when

- Maintain 40% female representation at senior manager level in our next declaration for the WIFC
- We achieve Disability Confident Leader status
- We increase colleague data held in CIPHR – achieving at least 50% response rate for each questions (current response rates range from 9% - 50% )

# Inclusion, Belonging and Engagement

Our annual engagement survey is a great source of information when reviewing our progress towards creating a dynamic, collaborative and inclusive culture at OneFamily. We can track our success and identify any actions by ensuring:

- Our colleagues are confident to provide us with personal DEI data, both through CIPHR and our annual engagement surveys with WorkL
  - > Specifically, a reduction in the % of colleagues who select “Prefer not to say” or skip the DEI questions at the end of annual engagement surveys.
- Engagement of colleagues is consistent across all genders, ethnicities, abilities and other characteristics
- Engagement of colleagues is consistent across all department and teams
- We maintain or improve on our “good” engagement score for question:
  - > “My Company cares about Diversity and Inclusion and does everything it can to promote it”

# Our 2025 measurable DEI Goals

We receive values award nominations for at least 25% of the OneFamily Population



We make significant progress towards achieving Disability Confident Leader Status



Maintain 40% female representation at senior manager level in our next declaration for the WIFC



These 3 measures are also subsidiary corporate objectives

We are shortlisted or win industry DEI awards

Engagement of colleagues is consistent across all genders, ethnicities, abilities and other characteristics and where it is not action is taken to close the gap

Engagement of colleagues is consistent across all department and teams and where it is not action is taken to close the gap

We maintain or improve on our “good” engagement score for question:

“My Company cares about Diversity and Inclusion and does everything it can to promote it”

A reduction in the % of colleagues who select “Prefer not to say” or skip the DEI questions at the end of annual engagement surveys.

We publish our OneFamily EDI Strategy & Charter Internally & Externally

We increase colleague data held in CIPHR – achieving an increase in response rate for each questions



# 2026 – 27 activities

2026

**Celebrate**

**Educate**

**Visibility**

**Engagement**

We will publish progress and submit OneFamily for assessment to achieve Disability Confident Leaders Status

DEI data benchmarking reporting

Maintain or improve on WIFC Target

Publish externally our commitment to DEI on website and promote our participation and sponsorship of DEI events in our communities

Establish a Reverse Mentoring Programme in conjunction with the Colleague Diversity Networks.

Review any FCA & PRA actions

Continue work with charity partners to celebrate, educate and increase visibility – specific focus on financial education and social mobility – aligned to Inspiring Better Futures vision