

Probate diversity summary template

Please refer to the guidance notes on the second tab of this workbook.

Firm name:

ICAEW firm number (C00/A00):

Number of employees:

Completed questionnaires:

1. About you

ICAEW Chartered Accountant	<input type="text" value="4"/> Partner	<input type="text" value="9"/> Manager	<input type="text" value="4"/> Qualified	<input type="text" value="6"/> Training
Other Chartered Accountant	<input type="text"/> Partner	<input type="text" value="3"/> Manager	<input type="text" value="1"/> Qualified	<input type="text" value="1"/> Training
Other accountant	<input type="text"/> Partner	<input type="text" value="3"/> Manager	<input type="text" value="9"/> Qualified	<input type="text" value="9"/> Training
Legally qualified	<input type="text"/> Partner	<input type="text" value="1"/> Manager	<input type="text"/> Qualified	<input type="text" value="1"/> Training
Other legal	<input type="text"/> Partner	<input type="text"/> Manager	<input type="text"/> Qualified	<input type="text"/> Training
Other profession	<input type="text" value="1"/> Partner	<input type="text" value="2"/> Manager	<input type="text" value="1"/> Qualified	<input type="text"/> Training
Direct support staff	<input type="text" value="2"/>			
Other	<input type="text" value="2"/>			
Prefer not to say	<input type="text" value="3"/>			

Total responses for question 1: **Total checked. Please proceed to next question**

2. Age

16-24 25-34 35-44 45-54 55-64 65+ Prefer not to say

Total responses for question 2: **Total checked. Please proceed to next question**

3. Gender

Male Female Trans Other Prefer not to say

Total responses for question 3: **Total checked. Please proceed to next question**

4. Disability

(a) Yes No Prefer not to say

(b) Yes, limited a lot Yes, limited a little No Prefer not to say

Total responses for question 4: **Total checked. Please proceed to next question**

5. Ethnic group

Asian/Asian British

Bangladeshi Chinese Indian Pakistani Other Asian

Black/African/Caribbean/British

African Caribbean Any other Black/African/Caribbean/Black British

Mixed/multiple ethnic groups

White and Asian White and Black African White and Black Caribbean Other mixed/multiple ethnic background

White

British/English/Welsh/Northern Irish/Scottish Irish Gypsy or Irish Traveller Any other white background

Arab

Arab

Other

Other ethnic group Prefer not to say

Total responses for question 5: **Total checked. Please proceed to next question**

6. Faith

Buddhist Christian Hindu Jewish Muslim Sikh Any other religion

Prefer not to say No Religion

Total responses for question 6: **Total checked. Please proceed to next question**

7. Sexual orientation

Bisexual Gay man Gay woman /lesbian Heterosexual/straight Other Prefer not to say

Total responses for question 7:

62

Total checked. Please proceed to next question

8. Socio-economic background

- (a) 12 Yes 5 No 40 Did not attend 5 Prefer not to say
- (b) 54 UK state school 4 UK independent/fee-paying school Attended school outside the UK 4 Prefer not to say

Total responses for question 8:

62

Total checked. Please proceed to next question

9. Social mobility

- (a) 8 Yes 45 No 4 I don't know 5 Prefer not to say
- (b)
- 1 1-4 O levels / CSEs / GCSEs (any grades), Entry Level, Foundation Diploma
- NVQ Level 1, Foundation GNVQ, Basic Skills
- 2 5+ O levels (passes) / CSEs (grade 1) / GCSEs (A*-C), School Certificate, 1 A level/2-3
- 1 AS levels/VCEs, Higher Diploma
- 4 NVQ Level 2, Intermediate GNVQ, City and Guilds Craft, BTEC First/General Diploma, RSA
- Diploma
- Apprenticeship
- 15 2+ A levels/VCEs, 4+ AS levels, Higher School Certificate, Progression/Advanced Diploma
- 3 NVQ Level 3, Advanced GNVQ, City and Guilds Advanced Craft, ONC, OND, BTEC National,
- RSA Advanced Diploma
- 6 Undergraduate degree (eg, BA, BSc)
- 2 Master's degree (eg, MA, MSc)
- Doctorate degree (eg, PhD)
- NVQ Level 4-5, HNC, HND, RSA Higher Diploma, BTEC Higher Level
- 22 Professional qualifications (eg, teaching, nursing, accountancy)
- 2 Other vocational/work-related qualifications
- Non-UK qualifications
- No qualifications
- 4 Prefer not to say

- (c) 6 Yes 37 No 11 I don't know 8 Prefer not to say

- (d) 6 Yes 42 No 6 I don't know 8 Prefer not to say

Total responses for question 9:

62

Total checked. Please proceed to next question

10. Caring responsibilities

- (a) 12 Yes 46 No 4 Prefer not to say
- (b) 53 No 3 Yes, 1-19 hours per week Yes, 20-49 hours per week Yes, 50 or more hours per week
- 6 Prefer not to say

Total responses for question 10:

62

Total checked. Please proceed to next question

Review findings

The firm is committed to provide equal opportunities in employment. This means that all job applicants and employees will receive equal treatment regardless of gender, sexual orientation, marital status, race, colour, age, nationality, ethnic or national origins, religious beliefs or disability. It is good business sense for us to ensure that our most important resource, our staff, is recruited and treated in a fair and effective way. Our policies on equal opportunities are included in our Staff Handbook.

The firm monitors the diversity of the workforce by reviewing the composition of its existing staff and applicant for jobs. When recruiting, we consider all applications based on the skills required for the position. Similarly promotion within the firm is based solely on merit.

Our current data is as we expected, based on the population in Eastbourne and surrounding areas, where most of our employees live.

Interestingly, our current data indicates that over half the work force is less than 44 years of age. We feel our young work force is mainly because we recruit apprentices and provide a lot of training opportunities for existing staff. Our Staff Handbook also mentions that retirement is a matter of choice for individuals and that the firm will not pressurise employees into resigning because they have reached, or are approaching, a certain age. Employees are free to retire whenever they choose or to seek alternative roles or working patterns. We are proud to employ people of all ages and consider that age diversity is beneficial to the organisation. As per our firm's policy we will continue to consider applicants of all ages within our recruitment process.

End of survey