



PROFESSIONAL
STANDARDS
DEPARTMENT

2025 Probate Diversity Survey

GETTING STARTED WEBINAR

Today's presenters



Sophie Wales
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ICAEW Professional Standards Department



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The Access Group

Today's webinar

- The statutory relevance of diversity reporting
- The benefits of a diverse workforce
- What does your firm need to do?
- Who should complete the survey, answer options and new survey questions
- How to collect, publish and submit your firm's survey data including a demonstration of the online survey tool
- Dates for your diary
- Further support, useful links, Q&A

The statutory relevance of diversity reporting

- Under the Equality Act 2010, ICAEW is listed as one of the bodies required to have due regard to the equality duty as part of its regulatory functions.
- Under the Legal Services Act 2007, legal regulators must **'encourage an independent, strong, diverse and effective legal profession.'**



The benefits of a diverse workforce

- Stronger culture, better performance, deeper customer insights
- A competitive advantage
- Encourages inclusive practices and diversity of thought

"The 'business case' debate is now well rehearsed, and it is generally accepted across the business world that diversity is a strategic enabler, ensuring competitive advance and positioning organisations as employers of choice"

Employers Network for Equality & Inclusion



What does your firm need to do?

- All staff complete the ICAEW probate diversity questionnaire as close to 31 March 2025 as possible.
- An anonymised summary of the results to be submitted to ICAEW with an analysis of the results by 30 April 2025.
- An anonymised summary to be published on your firm's website/communication materials by 31 May 2025.



Who should complete the survey

- Please ask **all staff** to complete the survey, not just those working with probate clients
 - Subsidiary firms can be included.
 - The survey link can also be shared with employees not currently in the workplace
 - Mandatory for firms to return results



'Prefer not to say'

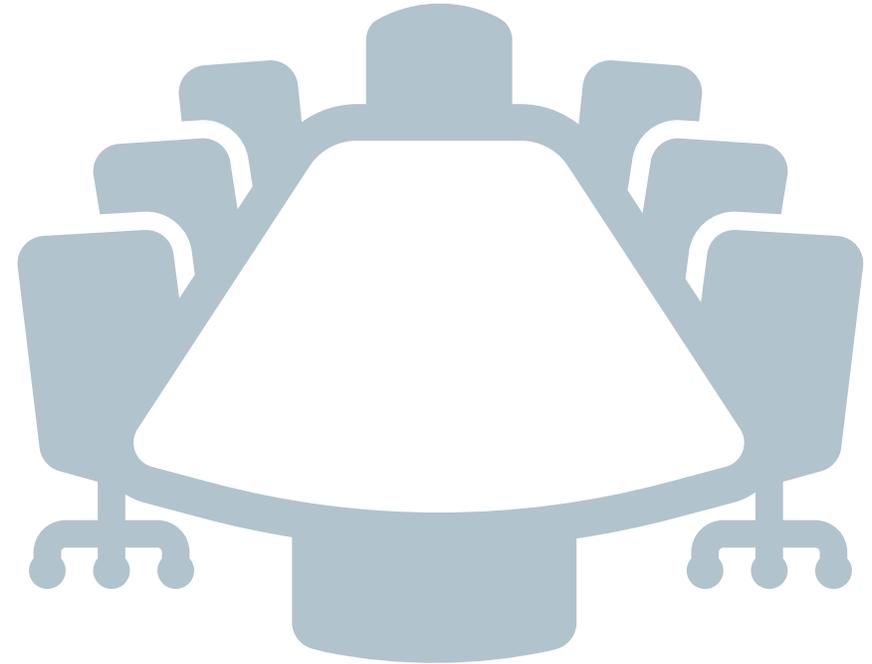
- The 'Prefer not to say' option is available for anyone who does not want to respond to any of the survey questions.
- It is still a useful response to us and to your firm.

Survey Questions

- Role
- Age
- Sex/gender
- Disability
- Ethnic group
- Sexual orientation
- Socio-economic background
- Social mobility
- Caring responsibilities
- Martial status
- Maternity and paternity
- **Neurodiversity**

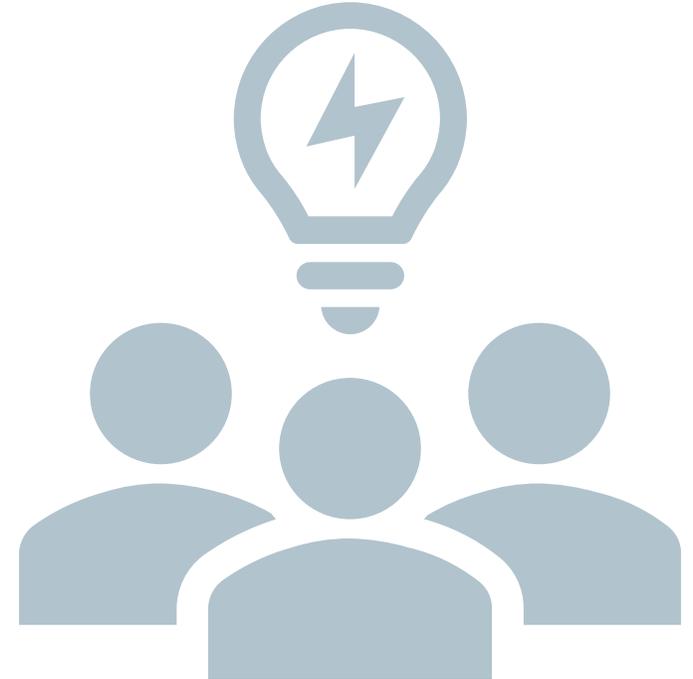
New questions: Neurodiversity

- Do you consider yourself to be neurodivergent?
- Have you disclosed your neurodivergence to your employer?



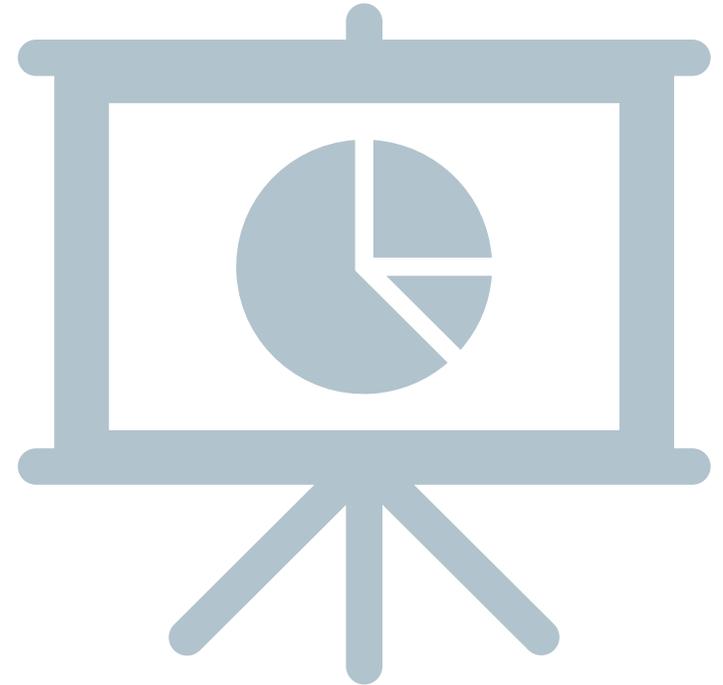
Why is understanding neurodiversity important?

- Neurodivergence is often overlooked
- Supports diversity of thought in the workplace
- Gain insights that will inform our regulatory approach
- Enable firms to tailor their practices and EDI initiatives



How to collect your firm's data

- Access Group is supporting the 2025 survey
- Firms have free access to an online survey tool which automatically creates your survey
- All firms (no matter what size) should use the survey tool to collect their data.





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Online survey demonstration

GARY HUMPHREYS, ACCESS GROUP

Access Group survey tool recap

- The survey link is <https://survey.riliance.co.uk/>
- The tool is free to use.
- You can use your existing account if you have one.
- The number of surveys you request is the number of times the link can be used.
- You can add additional staff to the number of surveys you need at any time.
- You need to submit your summary data to ICAEW.

Publishing the data

- Publish the aggregated results on your website by 31 May 2025
- Include a summary paragraph about the results.
- Could anonymity be compromised? If the data is collected from relatively small data-sets, individual staff members may be identifiable. Adapt the information you publish if required.
- No website? Publish the data on documentation eg, as a paragraph in a letter of engagement or in advertising materials.

What to submit to ICAEW

- Send the aggregated results (we must not receive individual responses) to ICAEW by 30 April 2025.
 - Download the aggregated report and send the results to ICAEW. **Access will not submit your data for you.**
 - Your firm's return will not be marked as complete until we also receive the required short summary paragraph
 - Please include your firm number (C0xxxxx) with your submission.
- Please submit the results and summary analysis to probate.diversity@icaew.com
- **Please note**, late submissions will result in a referral to the Legal Services Committee and may result in a regulatory penalty.

2025 reporting

- As with the previous surveys, we'll publish a full report that you can use to benchmark your firm and to:
 - understand the profile of your current teams and plan for future recruitment; and
 - identity opportunities: Has your firm got the right people in place to reflect current and future client profiles?
- The report will be available on icaew.com/probatediversity and via *Probate News*.
- Our research partner OMB will also present a short webinar on the 2025 results later in the year.

Key dates for your diary



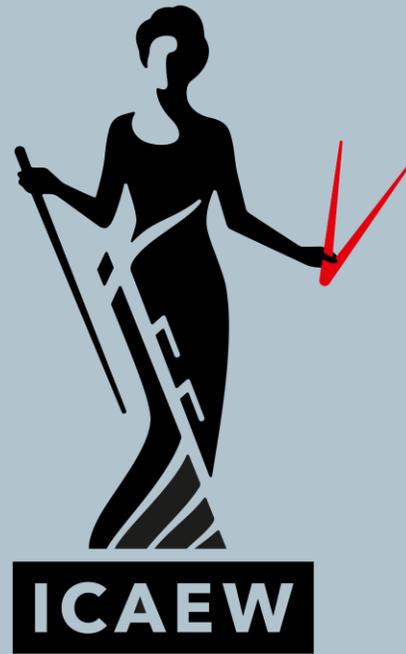
Useful links and support

- Visit <https://survey.riliance.co.uk/> to create your firm's survey.
- More information about collecting data, previous survey results and FAQs are available at icaew.com/probatediversity
- ICAEW probate register: icaew.com/probateregister
- If help is needed or any questions, please contact Sandra Da Silva, Reserved Legal Services Case Manager, on +44 (0)1908 546 302 or email probate.diversity@icaew.com
- You can also call our Technical Advisory helpline on +44 (0)1908 248 250



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Q&A



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