# State of the Nation:
# Retaining and developing employees with disabilities

**What helps and what gets in the way of employers retaining and developing their employees with disabilities and long-term health conditions?**

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**June 2015**

**Business Disability Forum**

**Building disability-smart organisations**

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# FOREWORD

With expenditure on staff turnover in just 5 sectors costing UK business more than £4 billion each year and the average cost of replacing individual employees estimated at £30,000[1], Business Disability Forum (BDF) is thrilled to release the first ever report about the skills, confidence and practices that help retain and develop employees with disabilities and long term health conditions across private, public and third sector employers in the UK.

The new Government is committed to halving the gap in the employment rate of disabled people and non-disabled people. With the employment rate for disabled people 30% lower than it is for people without disabilities, growing the numbers of disabled people in work is of utmost importance. This requires a whole-organisation approach which ensures that online recruitment processes are wholly accessible to people with diverse disabilities, outsourced recruitment partners and suppliers are skilled and confident in making adjustments through the recruitment and on-boarding process for disabled candidates and new recruits, premises are accessible to employees with disabilities, line managers are skilled and confident and have access to good quality advice and guidance about managing a new staff member joining their team who requires adjustments and so on.

But what happens then? This first state of the nation report reveals how widespread good practices are within UK employers, particularly larger employers across the private, public and not-for-profit sectors, in retaining and developing employees with disabilities. The report offers some very practical actions for any employer that is committed to improving retention. For example, all employers should distinguish between disability related absence and sickness absence to minimise legal and reputational risks. All employers benefit from investing in more skilled and confident line managers through good quality guidance and training. All employers will do well to embed workplace adjustment processes that 'de-medicalise' adjustment needs and provide the right adjustments as quickly as possible.

We are delighted that there has been such commitment on the part of so many employers to join with us in lifting the lid on what helps and what gets in the way of retaining and developing employees with disabilities.  We look forward to future reports evidencing the progress that is being made.

**George Selvanera**
**Director of Policy, Services and Communications**

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[1] See: HR REVIEW (Feb 2014)

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## EXECUTIVE SUMMARY

"Employers that dismantle the barriers facing employees with disabilities to allow equal access and secure full inclusion will be doing what is right, but will also flourish and grow in confidence as a result."[2]

As part of the Department of Work and Pensions Disability Employer Engagement Steering Group (DEESG), Business Disability Forum (BDF) chairs a sub-group committed to promoting what works in retaining and developing employees with disabilities and long-term health conditions.

Working with representatives from de Poel Community, EY, Royal Mail, Lloyds Banking Group, Department of Works and Pensions, Equal Approach and Remploy Employment Services, BDF has led a research project that engaged 145 private, public and third sector employers across April - May 2015.

This landmark 'state of the nation' report sets out key findings from the research and draws attention to some excellent practices and some areas of legal and reputational risk for UK private, public and third sector employers in retaining and developing employees with disabilities and long term health conditions. The report also sets out what actions all employers can undertake to make a real sustained difference to retaining and developing these employees.

## KEY FINDINGS

### Key aids and barriers to retaining and developing employees with disabilities

1. Across all organisation types, the biggest aids to an organisation retaining and developing employees with disabilities and long term health conditions are:

   a. For half of all private, public and third sector employers, organisational values that prioritise improving disability performance was rated most important.

   b. Close to half of all employers identified that good quality workplace or 'reasonable' adjustment processes was important.

   c. Ensuring consistency in policies so that individual line managers were not left to operationalise policies such as disability related absence or

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[2] Retaining and Developing Disabled Staff in the Lifelong Learning Sector- Lifelong Learning UK

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workplace adjustments are also seen as key by more than two in five employers including more than half of all public sector employers.

2.  The biggest barriers to retaining and developing employees with disabilities and long term health conditions are:

    a.  For more than half of all private and public employers, a lack of skilled and confident line managers, with 13 in 20 public sector employers identifying this as one of the three biggest barriers.

    b.  For two in five of all employers, not knowing or knowing too few disabled people within the organisation was a key barrier, with half of all private sector employers identifying this as a primary barrier.

    c.  One in three employers cite a lack of targeted development of employees with disabilities and long term health conditions as a major barrier. This concern about the lack of development was cited as a key barrier for two in five third sector employers.

## Strategy for retaining and developing employees with disabilities

1.  25% of employers have disabled role models within their organisations, which reduces to 20% for public sector employers. These organisations- those with disabled role models- tend also to be the most disability-smart on other criteria such as having disabled employee networks, good and consistently implemented policies and more confident and skilled line managers.

2.  Close to half of employers (47%) report having a named lead for encouraging retention of all staff; with a slightly smaller group identifying that they have a named lead for retaining employees with disabilities (41%). The contrast is more apparent in the private sector, with over half of all employers having a lead for staff retention, but less with than two in five employers having a lead for retention of employees with disabilities.

    a.  25% of employers reported that they had both a lead for retention of all staff and for retention of employees with disabilities. These employers also tended to be amongst the best in ensuring good policies related to absence management and return to work.

3.  11 in 20 private sector employers are collecting data about the numbers of disabled candidates applying to work and accepting offers to work at their employers. While the public sector does substantially better at this, given

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Equality Act (2010) requirements for public sector employers to take account of disability in all they do, it remains an area for development for just over one in every 10 public sector employers.

    a. Employers are more likely to collect data during the recruitment process, on application and work acceptance offers by disabled people – seven in 10 employers collect this data. In contrast, only two in five of all employers collect data on promotion and training with this mainly concentrated amongst public sector employers.

    b. Amongst those employers which are collecting data, just two in every three then use this information to inform their strategy on the recruitment and retention of employees with disabilities. This is a key area for development for those employers which have not yet used their data to inform strategy.

4. While target setting for increasing recruitment of, and the progression of employees with disabilities is gaining some popularity[3], at present 20% of employers set targets for the numbers of disabled people they want working in their organisation. This is lower in the private sector with 7% of employers setting targets.

    a. Target setting for promotion of employees with disabilities is lower, with 8% of all employers making this commitment to the progression of their employees with disabilities.

## Workplace adjustments

1. Nearly all employers reported having a workplace adjustments process- 96% of employers.

    a. Employers appear mainly confident that their employees and suppliers possess the knowledge required for making workplace adjustments, with 75% of employers confident that their employees and suppliers have knowledge about legal requirements in relation to adjustments.

    b. Nonetheless, 66% of employers report very limited confidence in their staff knowing where they can access advice about workplace adjustments from outside their organisation.

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[3] See, for example, the work of BDF Partner KPMG: http://www.kpmg.com/uk/en/issuesandinsights/articlespublications/newsreleases/pages/kpmg-announces-detailed-diversity-targets-and-greater-transparency-on-the-profile-of-its-staff.aspx and the work of BDF Member Channel 4: http://www.channel4.com/media/documents/corporate/diversitycharter/Channel4360DiversityCharterFINAL.pdf.

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c. For those employers with much more confidence about where to access external advice and guidance, they also consistently reported having knowledge about Access to Work in supporting employment for disabled people and in ensuring line managers were knowledgeable and skilled in handling absence management and return to work.

2. Less than 20% of employers have written adjustment agreements in place for all their employees with adjustments. This is an opportunity for all employers to implement best practices and minimise potential legal and reputational risks. See, for example, a template tailored adjustment agreement at: http://businessdisabilityforum.org.uk/employee-engagement/the-law/.

## Support and development for employees, including those with disabilities and long term health conditions

1. Nearly all private and public sector employers have healthy workplace policies such as smoking cessation programmes and healthy eating (96% and 91% respectively) although just 60% of third sector employers have these policies.

2. Public sector employers are much more likely than private sector employers to have employee networks for their employees with disabilities (80% compared with 50%) and to take account of differences in employee engagement scores between employees with disabilities and without disabilities in staff surveys (75% compared with 50%).

## Absence related management and return to work

1. One in four employers are operating with high levels of legal risk by treating disability related absence and sickness absence the same. This risk is higher amongst public sector employers where two in five public sector employers treat disability related absence and sickness absence the same.

2. Private sector employers also score much better than the public sector as it relates to line managers knowing how to manage disability related absence and return to work (86% compared to 64%) and in having policies about returning to work after disability related absences (76% compared to 66%).

3. Third sector employers are the most likely to stipulate in policies that harassment or bullying related to disability is unacceptable, 85% compared with 80% for the private sector and 70% for the public sector.

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## So what should employers do?

The research points to five key actions that any organisation - big, small, private, public, third sector, UK wide, more local - can do to make a big improvement in the retention and development of employees with disabilities. These are:

1.  **Give visibility to disability within the organisation.**

Quick wins include:
*   Have testimonials of employees with disabilities on recruitment webpages and profile contributions of employees with disabilities in staff newsletters and other communications.
*   Having staff networks for employees with disabilities.

2.  **Build the skills and confidence of line managers to effectively manage disabled colleagues through training and access to good quality advice and guidance.**

Quick wins include:
*   Publicise the availability of centrally-stored, up-to-date advice and guidance on all aspects of how disability affects employers on the intranet.
*   Ensure line managers are supported when on-boarding new team members with adjustment requirements and when existing staff acquire a disability.

3.  **Have consistency in key policies so it is not left to line managers to operationalise policies. It creates uneven outcomes for employees with disabilities and increases legal and reputational risks.**

A quick win includes having a stand-alone disability related absence policy and clear guidelines for line managers about how disability related absence is managed (as distinct from sickness absence).

4.  **Have a workplace adjustment process based on: trusting employees; what helps an employee be productive and at work (rather than a medical model); and can deliver the right adjustment quickly.**

BDF Partner Lloyds Banking Group (LBG) delivered a transformation of their workplace adjustment processes that improved productivity and morale, reduced sickness absence and reduced the time involved in delivering workplace adjustments from an average of 3-6 months to 14 days while cutting the costs of adjustments. See: http://ow.ly/ODmk8

5.  **Provide targeted development opportunities for employees with disabilities.**

Best practice includes reviewing performance appraisal systems for unconscious biases that limit the progress of employees with disabilities.
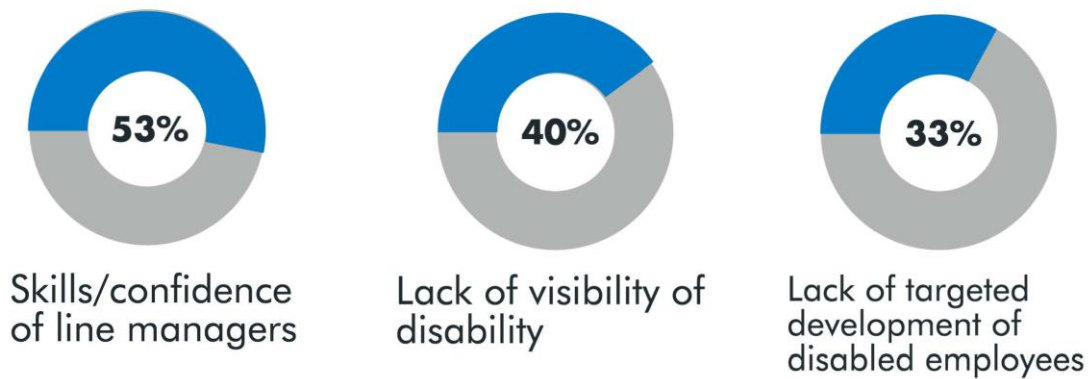
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## STATE OF THE NATION: AT A GLANCE



**Retaining & developing employees with disabilities**

**Business Disability Forum**

**Main reported aids to retention of disabled employees**

42%: Consistency in policies

44%: Good workplace adjustments process

52%: Organisational values

**Main reported barriers to retention of disabled employees**

53% — Skills/confidence of line managers

40% — Lack of visibility of disability

33% — Lack of targeted development of disabled employees

**Percentage of organisations with disabled role models**

Public sector — 20%

Private sector — 25%

Third sector/other — 43%

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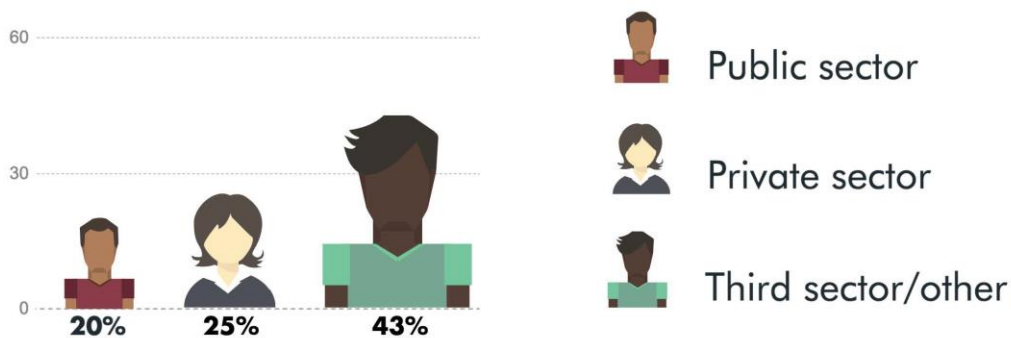
**Percentage of all employers with named lead for encouraging retention for all staff vs. named lead for retention of disabled employees**
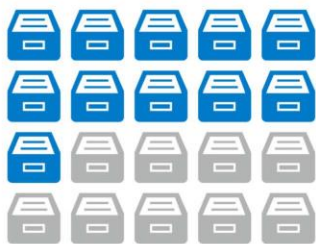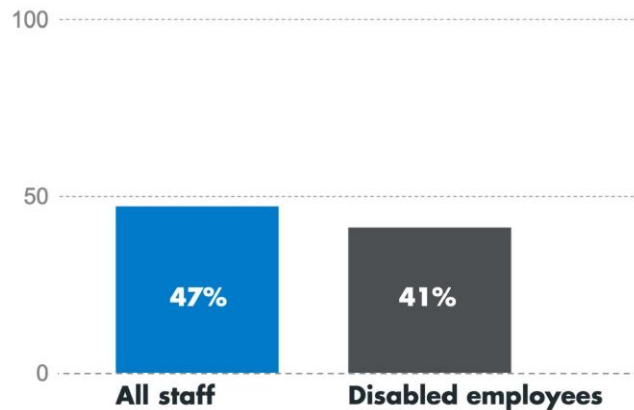


All staff 47%
Disabled employees 41%

**11 in 20**

private sector employers are collecting data about the numbers of disabled candidates applying to work and accepting offers to work for their organisation

**20% of employers**

set targets for the number of disabled people they want working in their organisation
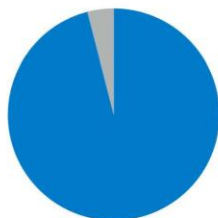
**96%**

of employers have a workplace adjustments process in place;
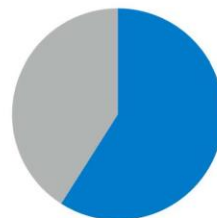
**Yet 59% of employers**

report very limited confidence in their staff knowing where they can access advice about adjustments from outside their organisation.
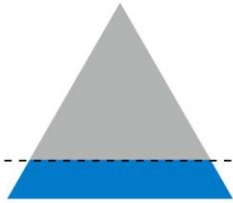
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## Less than 20%

of employers have written adjustment agreements in place for all their employees with adjustments.

## Nearly all

private & public sector employers have healthy workplace policies in place;

**69%**

## Yet significantly less

third sector employers have these policies in place.

## 1 in 4

employers are operating with high levels of legal risk by treating disability related absence and sickness absence the same.

**Percentage of organisations that stipulate that harassment or bullying relating to disability is unacceptable**

70%: Public sector

80%: Private sector

85%: Third sector

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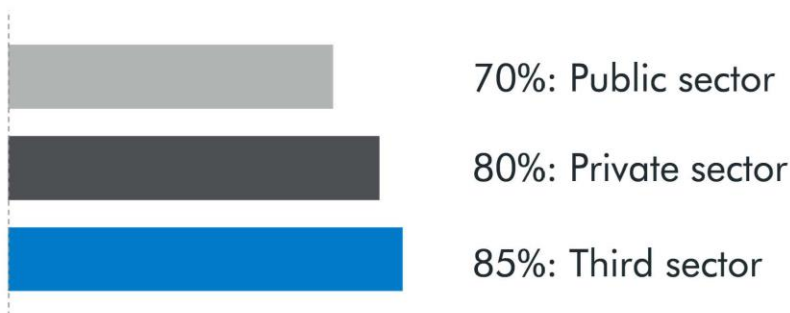
# INTRODUCTION

A key priority for the new Government is reducing by half the proportion of disabled people that are unemployed. With the employment rate for disabled people 30% lower than people without disabilities, ensuring increasing numbers of disabled people have jobs is both an economic and social priority. Improving productivity is also a key priority for the new Government. The Office of National Statistics report that output per hour worked in the UK is 21% lower than the average for the other six members of the G7 – the US, Germany, France, Italy, Japan and Canada[4].

The business case for a good recruitment and retention strategy is clear. For those employers that get it right, there are savings from reduced staff attrition at the same time as skilled and experienced staff remain with the organisation and morale and productivity improve.

The effect of losing staff is significant: recent figures suggest the cost of employee turnover to UK business exceeds £4 billion annually – replacing an individual employee can cost upwards of £30,000[5]. More importantly, not only does it cost employers when an employee leaves, it costs the organisation to gain and train a new employee - on average, workers take 28 weeks to reach optimum productivity which has an estimated average cost of £25,181 per employee[6]. A 2012 US study identifies direct and indirect costs to employee retention that show the impact of employee turnover is not solely financial. Turnover also affects productivity, work quality, workplace morale, and lost institutional knowledge.[7] Researchers Boushey and Glynn note:

> "Implementing workplace policies that benefit workers and help boost employee retention is not simply a "nice" thing for employers to do for their employees. Maintaining a stable workforce by reducing employee turnover through better benefits and flexible workplace policies also makes good business sense, as it can result in significant cost savings to employers."[8]

The Equality Challenge Unit (2011)[9] reinforce this. They report that: "Equitable practices and fair working conditions should have a positive impact on retention rates, staff morale and productivity for employees with disabilities and the wider

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[4] Statistical bulletin: International Comparisons of Productivity - Final Estimates, 2012

[5] Estimated cost of replacing a staff member is £30k HR Review Feb 2014
[6] Ibid.
[7] See Center for American Progress Nov 2012
[8] Ibid.
[9] Enabling Equality: Furthering Disability Equality (Equality Challenge Unit) 2011

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workforce." Implementing cultural and practical changes, then, has a positive impact not only for the retention and recruitment of employees with disabilities, but for all staff".

Given that 16% of the UK working-age population are disabled[10], and that the UK workforce is ageing (by 2020, almost one in three workers will be over the age of 50[11]) recruiting and retaining the best talent is an increasingly urgent priority.

Losing good quality staff is one very visible set of costs, while having staff unhappy and unproductive at work is another. Job stress and poor mental health are major contributing factors to absence and staff turnover. It is estimated that poor mental health costs the UK more than 70 million working days each year, and 25% of all employees experience absences related to mental ill-health[12]. The 2011 CBI Absence Survey[13] notes that absence from work costs the UK economy £17 billion annually. Research also points to a lack of training and development, lack of progression opportunities, poor workplace relationships and employee disengagement as key factors contributing to low productivity, low morale and staff staying absent from work and leaving.[14]

The Government's Disability Employment and Health Strategy (2013) and Disability Confident campaign prioritise increasing the recruitment of disabled staff. On its own, this is a laudable objective. Through our more than twenty years of working with business and large public sector employers, BDF recognises that those employers that do best at recruiting employees with disabilities are those same employers which embed a whole-organisation approach to building their disability confidence. These are employers with senior sponsors prioritising improvement in disability performance. These are employers which invest in building the skills and confidence of line managers to effectively manage their employees with disabilities. These are organisations which are working with employees and customers with disabilities to improve information and communication technology, adjustment processes, premises, procurement processes and so on, so these meet the needs of all employees, candidates and customers, including those with disabilities.

As part of the Department of Work and Pensions Disability Employer Engagement Steering Group (DEESG), we were keen therefore to build on the good work that is taking place to promote accessible recruitment practices. BDF chairs a sub-

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[10] https://www.gov.uk/government/publications/disability-facts-and-figures/disability-facts-and-figures

[11] 'Performance and Retirement Practices: Get It Right' CIPD FEB 2012

[12] http://www.hrgrapevine.com/markets/hr/article/2015-05-27-over-a-quarter-of-long-term-absences-linked-to-mental-health  NB – this article appears to have gone missing…

[13] Managing attendance and employee turnover – ACAS GUIDE MARCH 2014

[14] http://www.cipd.co.uk/hr-resources/factsheets/employee-turnover-retention.aspx

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group which has a focus on promoting good practices in the retention and development of employees with disabilities and long term health conditions. Working with representatives from de Poel Community, EY, Royal Mail, Lloyds Banking Group, Department of Works and Pensions, Equal Approach and Remploy Employment Services, our first conversations at the end of 2014 revealed how limited research is about whether practices associated with retaining and developing employees with disabilities are widespread. To that end, our first mission was to develop an evidence base. We are delighted that 145 private, public and third sector employers engaged with the research project across April - May 2015. We are very grateful also to colleagues involved with the DEESG, the Chartered Institute of Personnel and Development (CIPD), Employment Related Services Association (ERSA), and the Diversity and Equality Service, Civil Service, for encouraging their colleagues to contribute to the research also.

The 'State of the Nation' report shows the extent to which good practice is present in UK employers across a variety of sectors and sizes, albeit with some bias towards larger employers. The report shows what contributes to the overall strategy of retaining employees with disabilities. The report also sets out what employers can do to improve how they meet the needs of their employees with disabilities and in so doing, improve the organisation for everyone.

Our work on promoting what works in retaining and developing employees with disabilities has only started with this research report. Our current work programme includes:

- Further qualitative research with business to delve deeper into the relationship between visibility of disability within an organisation, consistency in how key policies that impact disability are implemented and the skills and confidence of line managers.

- Research with employees with disabilities to compare and contrast their perspectives about how effective their organisation is at retaining and developing employees with disabilities with their colleagues in human resources.

- Developing tool-kits to help employers of different types and in different sectors make the practical changes that make a difference for their employees with disabilities.

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# 1. KEY AIDS AND BARRIERS TO RETAINING AND DEVELOPING EMPLOYEES WITH DISABILITIES

## Key barriers

Our first priority was to understand what employers identify as the primary aids and barriers to implementing practices that support the retention and development of employees with disabilities.

Overall, the three main reported barriers were:

- Skills/confidence of line managers was reported by 53% of all employers as the main barrier to good retention practice.
- Limited or no visibility of disability and disabled people within our organisation (40%)
- Lack of targeted development of employees with disabilities (33%).

*Table 1: Main reported barriers to retention of employees with disabilities*

| Barrier | Number | % |
| --- | --- | --- |
| Skills/confidence of line managers | 56 | 53% |
| A lack of visibility to disability within the organisation | 42 | 40% |
| Lack of targeted development of employees with disabilities | 35 | 33% |

*Base: 106*

Employers also identified strategies to overcome these barriers. These include:

- Clear policies and guidance that support line managers throughout performance management processes, in managing disability related absence and in managing workplace adjustments were identified as useful strategies. Alongside this, was access for line managers to good quality guidance and advice and training that helps build confidence to manage adjustment requirements for individual staff members.

- Staff networks for employees with disabilities is a good strategy for encouraging more visibility of disability within an organisation. BDF Partner Barclays Bank, for example, has done some great work in this area with their disabled colleague network, Reach, including holding a conference that focused on addressing the career development ambitions of employees with disabilities.

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- The use of testimonials by employees with disabilities for both internal and external communications was rated a 'quick win' while offering insight for colleagues, both disabled and non-disabled. These were rated especially useful in stimulating awareness and understanding of disability across the organisation as a whole.

In examining differences between sectors, Table 2 reveals significant differences between sectors. Half of private sector employers reported a lack of visibility to disability within their employers as a key barrier in contrast to less than one in three for public and third sector employers.

Approximately two in three public sector employers report that the skills and confidence of line managers is a primary barrier to the retention of employees with disabilities in contrast to less than one in five third sector employers, for example. This correlates with the fact that there is often reported low confidence in managers themselves. The 2014 CIPD Employee Outlook on UK employee attitudes highlights a drop in confidence with regards to managers, especially in the public sector, with trust hitting a two-year low.[15]

*Table 2: Main reported barriers to retention of employees with disabilities cross-sector*

| Barrier | Private Sector | Public Sector | Third/Other sector |
|---|---|---|---|
| Skills/confidence of line managers | 51% | 65% | 17% |
| A lack of visibility to disability within the organisation | 49% | 30% | 33% |
| Lack of targeted development of employees with disabilities | 31% | 32% | 42% |

*Base: 106*

Other barriers that employers cited were:

- Finding suitable redeployment

- Coping with very high levels of sickness absence

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[15] "This survey shows a marked increase in negative perceptions of senior managers, with overall trust and confidence in senior managers hitting a two-year low. Trust and confidence levels are particularly low in the public sector […]" -CIPD/Halogen Employee Outlook 2014

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- Lack of accurate records on the number of staff with disabilities

- Lack of awareness about non-visible disabilities and how to work effectively with disabled colleagues

- The impact of staff and budget cuts

- A lack of focus on disability in the diversity and inclusion agenda

- A lack of confidence in employees with disabilities

- Limited career progression in general.

## Key aids

Employers were also asked to identify the two major aids to retention and development of employees with disabilities. The main reported aids were organisational values, with half of all employers selecting this option. Then a good quality workplace (reasonable) adjustment process (44%) was a popular choice, as were good policies across the organisation (42%).

*Table 3: Main reported aids to retention of employees with disabilities*

| Aid | Number | % |
| --- | --- | --- |
| Organisational values | 55 | 52 |
| Workplace adjustments process | 47 | 44% |
| Good policies | 45 | 42% |

*Base: 106*

This suggests that an organisation's greatest asset is its culture: one that understands the importance of disability in the workplace and how to effectively work with and develop employees with disabilities.

It is important, then, that organisations work on transforming their values into well developed and well communicated policies with which all staff can engage. The fact that nearly half of all employers identified a good workplace adjustments process as a key aid to retention shows the importance of developing a robust process that is easy to use and engage with, delivers the right adjustments quickly and is based on trusting employees with adjustment requests and so 'de-medicalises' disability within the workplace. BDF Partner Lloyds Banking Group, for example, have delivered a transformation of their workplace adjustment processes that is best practice and is built around these principles[16].

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[16] http://businessdisabilityforum.org.uk/about-us/news/case-study-lloyds-banking-group-transforms-workplace-adjustments-process/

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In examining differences between sectors, Table 4 reveals some differences between sectors. Public sector employers were somewhat less likely to identify workplace adjustment processes as key as their colleagues in the private and third sector. By contrast, public sector employers were much more likely to identify good policy that enables consistency in the treatment of employees with disabilities as key as their colleagues in the private and third sector.

*Table 4: Main reported aids to retention of employees with disabilities cross-sector*

| Aid | Private Sector | Public Sector | Third/Other sector |
|---|---|---|---|
| Organisational values | 49% | 53% | 58% |
| Good quality adjustment process | 49% | 37% | 50% |
| Good policies across the organisation | 35% | 55% | 25% |

*Base: 106*

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# 2. STRATEGY

Best practice in retention of employees with disabilities requires strategic commitment. This is embodied in a strategic approach which thinks through the life-cycle of an employee with a disability being attracted to work with an employer, moving through a recruitment and on-boarding process, working, developing and progressing within the organisation and ultimately leaving the organisation. It is planned for, and it starts at talent attraction and recruitment.

Dawn Milman-Hurst, Equal Approach CEO, notes, for example:

> 'Successful retention and progression of disabled talent starts at the beginning of the diversity lifecycle, with employers and recruiters needing to demonstrate a commitment to disabled talent in the initial attraction and recruitment stages. The necessary adjustments need to be put in place early in the process, in order to enable people with disabilities to showcase their skills and capabilities in the recruitment process, and then excel in the workplace.'

## 2a. Role models

25% of employers identified that there were prominent role models within their organisations with disabilities. Tables 5 and 6 reveals differences between sectors and between employers with more or less than 1,000 employees. Public sector employers were much less likely to report having prominent role models (20%) compared to third sector employers (43%). By contrast smaller employers (i.e. with less than 1,000 employees) were more likely to have prominent role models (more than 40%) which was close to double that of employers with 1,000- 99,999 employees (less than 25%).

These results show a strong relevance to the identified aids and barriers: of the 42 employers which cite limited or no visibility of disability within their organisations as a barrier, 95% of these do not have prominent disabled role models. This is consistent with findings from Lifelong Learning UK which identify that a lack of disabled role models affects the career progression of employees with disabilities in general: 'We were particularly struck by the 'fatalism' of many employees with disabilities about promotion and career progression. There are few disabled role models in senior and strategic positions.'[17]

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[17] Retaining and developing disable staff in the lifelong learning sector- Lifelong Learning UK

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It is important to note the different attitudes to what is often called 'disclosure', or 'declaration' of disability at work, and while some employees with disabilities are happy to act as role models within their organisation, others choose not to have it form part of their identity at work. Best practice says it is much more important to create an enabling environment in which individuals can be themselves at work, have adjustment needs met and have access to other support necessary. This is consistent with the primary aid to retaining and developing employees with disabilities identified by employers: organisational values.

*Table 5: Breakdown of role models by sector*

| Type | Percentage of role models |
|---|---|
| Private | 25% |
| Public | 20% |
| Third/Other | 43% |

*Base: 115*

*Table 6 Breakdown of role models by sector*

| Number of employees | Percentage of role models |
|---|---|
| < 100 | 40% |
| 100 – 999 | 47% |
| 1000 | 21% |
| 10000 | 24% |
| 50000 | 11% |
| 100000 | 30% |

*Base: 115*

## 2b. Named leads for encouraging retention

Having a named lead for the retention and development of employees generally; and employees with disabilities, is strongly associated with good retention practices.

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Overall 47% of all employers reported having a retention lead for all staff, and 41% of employers identified having a named lead for employees with disabilities. As Table 7 reveals it is also much more likely that a private sector employer will have named leads for the retention of staff, more generally. It was slightly less the case for third sector employers, although third sector organisations tended to have smaller workforces relative to the private and public sector employers that participated in this research. This may explain the difference.

*Figure 1: Staff leads for retention*
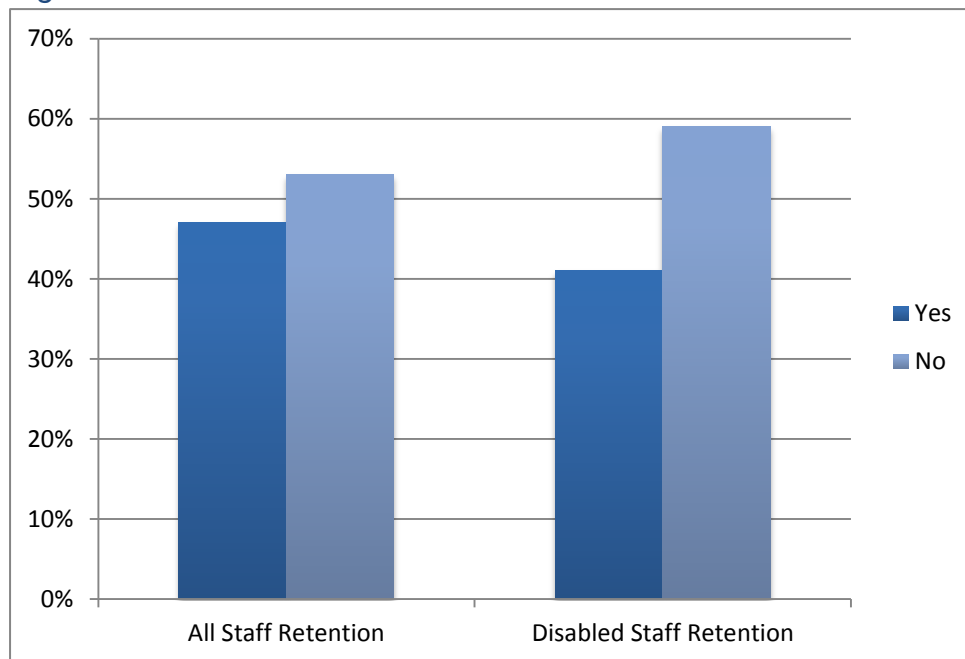


*Base: 115*

### Table 7: Breakdown of staff leads by sector

| Type | All staff / employees with disabilities |
| --- | --- |
| Private | 55% / 39% |
| Public | 40% / 44% |
| Third/Other | 36% / 36% |

*Base: 115*

Of the employers more likely to have named retention leads for their employees with disabilities, these same employers tended to report much better approaches to managing areas of legal and reputational risk, with more than four in every five of these employers treating disability related absence differently to sickness related absence, specifically referencing that disability related harassment is

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unacceptable, having policies about returning to work following a disability related absence and having policies about existing staff that might acquire a disability.

## 2c. Data collection and recording

A barrier that was identified by several employers was a lack of data on employees with disabilities to inform their retention strategy. In asking employers about the data they collected about disability, this reveals that employers are far more likely to collect data about disabled people's applications to work (69%) and b) work offer acceptance (72%), than whether employees with disabilities take up training (42%) or are promoted (49%.)

*Figure 2: Data collection*
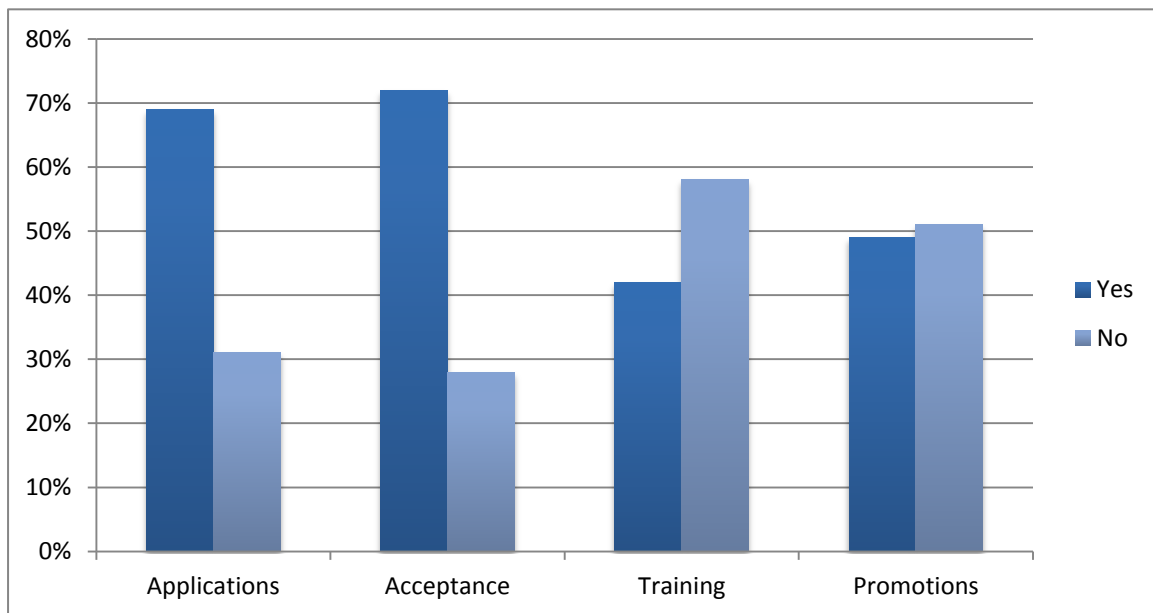


*Base: 115*

Table 8 reveals that public sector employers are the most likely to collect data about disability at different stages through recruitment and retention. This is consistent with statutory obligations relevant to the public sector (Equality Act 2010). Indeed, it is an area of potential legal and reputational risk for those public sector organisations that are not collecting this data. The third/other sector employers also overwhelmingly report collecting data on work offer acceptance by employees with disabilities. Private sector employers trail their colleagues in the public and third sector in each domain.

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*Table 7: Data collected by sector*

|  | **Private Sector** | **Public Sector** | **Third/Other Sector** |
| --- | --- | --- | --- |
| Applying to work at organisation | 55% | 89% | 57% |
| Accepting offers to work at organisation | 57% | 84% | 93% |
| Taking up training at organisation | 21% | 64% | 50% |
| Promoted at your organisation | 38% | 64% | 43% |

*Base: 115*

The employers who collect data were asked if they use this data to inform their strategy on retaining and developing employees with disabilities. Five in every eight (63%) reported using data to inform their strategy on retaining and developing employees with disabilities. This is similar across all sectors – no one sector reported percentages under 60% for use of data to inform strategy. This points to a number of organisations possessing some potentially very useful data that, as yet, is not informing their retention strategies for employees with disabilities.

## 2d. Targets

There is a growing appetite for the use of targets relevant to the recruitment of employees with disabilities. BDF Partners BBC and KPMG and BDF Member Channel 4 are amongst a growing number of organisations that have made public commitments to increasing the recruitment of employees with disabilities. This speaks to the commitment of BBC, KPMG and Channel 4 to improve their disability performance.

This is fraught territory, however, as it relies on individuals 'disclosing' their disability. For reasons set out at 2a, employees with disabilities won't feel the need to disclose that they have a disability or connect a disability to their own identity. For different individuals, their perceptions about whether an impairment constitutes a disability or not will also be different. We would reiterate the value of ensuring the work environment encourages employees to have access to the support they need to be productive and happy at work and where bringing one's whole self to the work is encouraged.

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*Figure 5: Target setting*
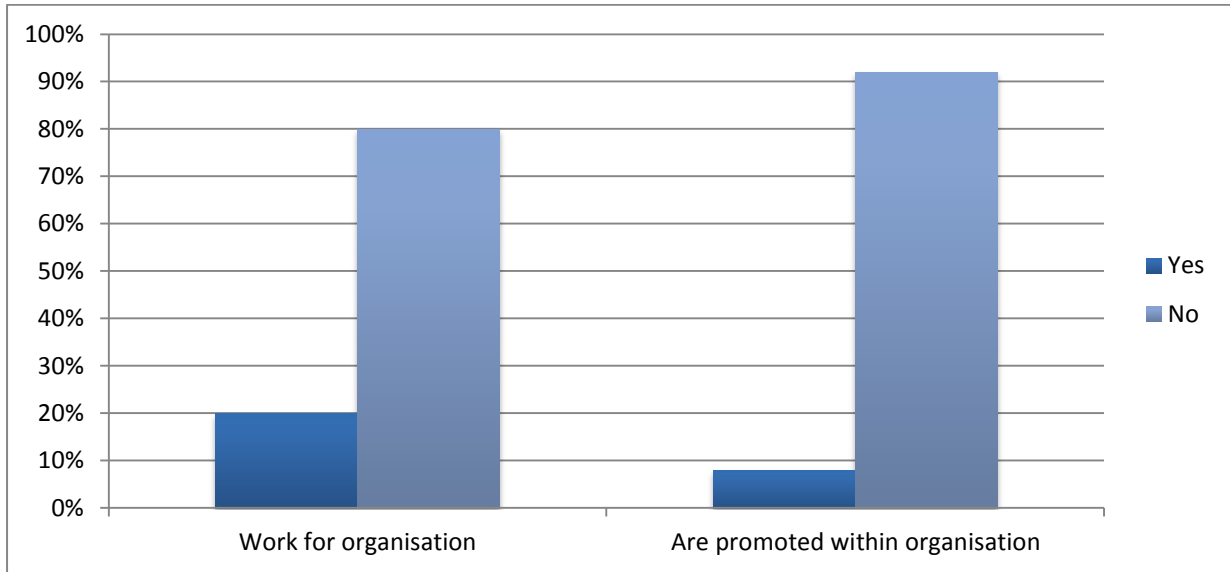


*Base: 115*

Target setting is relatively low. 20% of employers set targets for how many disabled people work for their organisations. An even smaller number, 8% of employers, set targets for the number or proportion of disabled people who are promoted within the organisation.

For those employers which set targets for both recruitment and promotion, these employers were slightly more likely to have a named lead for the retention of employees with disabilities - 58% on average.

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# 3. MAKING ADJUSTMENTS

Under the Equality Act 2010, employers have a duty to make reasonable adjustments for their employees with disabilities, to ensure equality in the workplace through the removal of physical or non-physical barriers, or by providing extra support. Workplace or reasonable adjustments form an essential part of the retention strategy.

Graeme Whippy, Senior Disability Manager, Group Disability Programme, Lloyds Banking Group said:

> 'Lloyds Banking Group is committed to providing workplace adjustments for colleagues with disabilities or long-term health conditions because it makes business sense to help our colleagues with disabilities work effectively, contribute to the success of their teams and help us retain their talent in our organisation.
>
> Implementing a robust centralised process has helped us reduce the costs and time taken to make adjustments. It has helped improve colleague and line manager confidence in asking for and agreeing to adjustments, and it has helped us reduce sickness absence and improve productivity. For us it's an essential component of being an agile and "disability smart" organisation.'

As set out previously, employers describe 'good workplace adjustment processes' as one of the most important elements to whether their organisation supports the retention and development of their employees with disabilities. This is reinforced by research by the Equality Challenge Unit which reports that often the effectiveness of the workplace adjustments process comes down to individual experience – positive or negative-  and how skilled line managers are in implementing the process: "what comes through strongly is that the approach of line managers and of senior management makes a real difference to individuals."[18]

## 3a. Workplace adjustments

Employers were asked if they have a workplace adjustments process in place for candidates and employees with disabilities. It was encouraging that 96% of employers to this question have them in place.

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[18] Enabling Equality: Furthering Disability Equality for Staff in Higher Education (Equality Challenge Unit) 2011

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Employers were also asked if they have written adjustment agreements for individual employees with disabilities, and how common this was in their organisation.

*Figure 6: Written adjustment agreements*
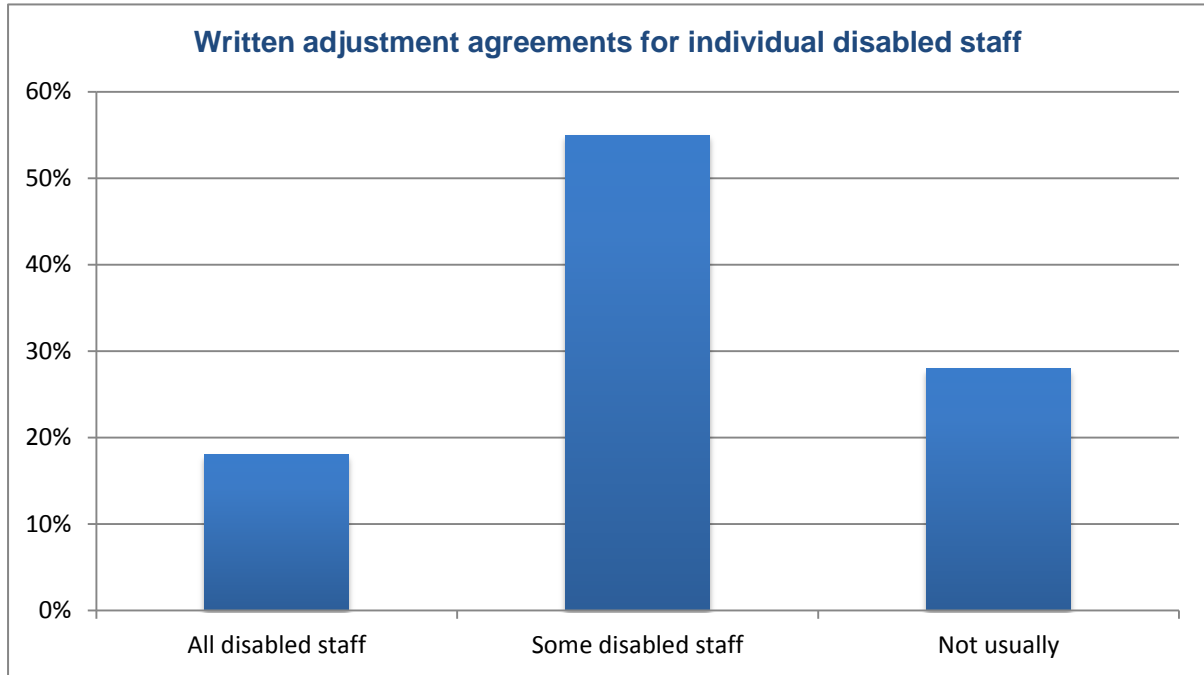


*Base: 112*

Answers tended towards written adjustment agreements for some employees with disabilities, with half of all employers selecting this option. One in three employers do not have written adjustment agreements for any employees with disabilities with private sector employers the least likely to have these (two in five employers do not typically have written agreements). This is an area for development as best practice employers do record adjustment agreements. This isn't being risk averse but about ensuring clarity of expectations for the employing organisation, the line manager and the individual employee with adjustment requirements.

**Table 8: Written adjustment agreements**

|  | Private Sector | Public Sector | Third/Other Sector |
|---|---|---|---|
| All | 13% | 20% | 29% |
| Some | 48% | 64% | 50% |
| Not usually | 39% | 16% | 21% |

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Increasingly, better employers enable portability of adjustments between roles as well thus making employees with disabilities progression through an organisation more seamless. This is made much more straightforward when tailored adjustment agreements are in place. See, for example, a template tailored adjustment agreement at: http://businessdisabilityforum.org.uk/employee-engagement/the-law/.

## 3b. Knowledge about how to make adjustments and where to access advice

The knowledge about how to make appropriate workplace adjustments is pivotal to enabling employees with disabilities to be productive. Figure 7 shows that employers are most likely to report mid to high confidence for knowing their legal obligations (75%), finding information about workplace/reasonable adjustments within the organisation (83%), and involving occupational health (78%).

However, employers report a lot less confidence in where to seek advice and guidance outside their organisation as it relates to workplace adjustments (41%).

*Figure 7: Organisational confidence in knowledge*
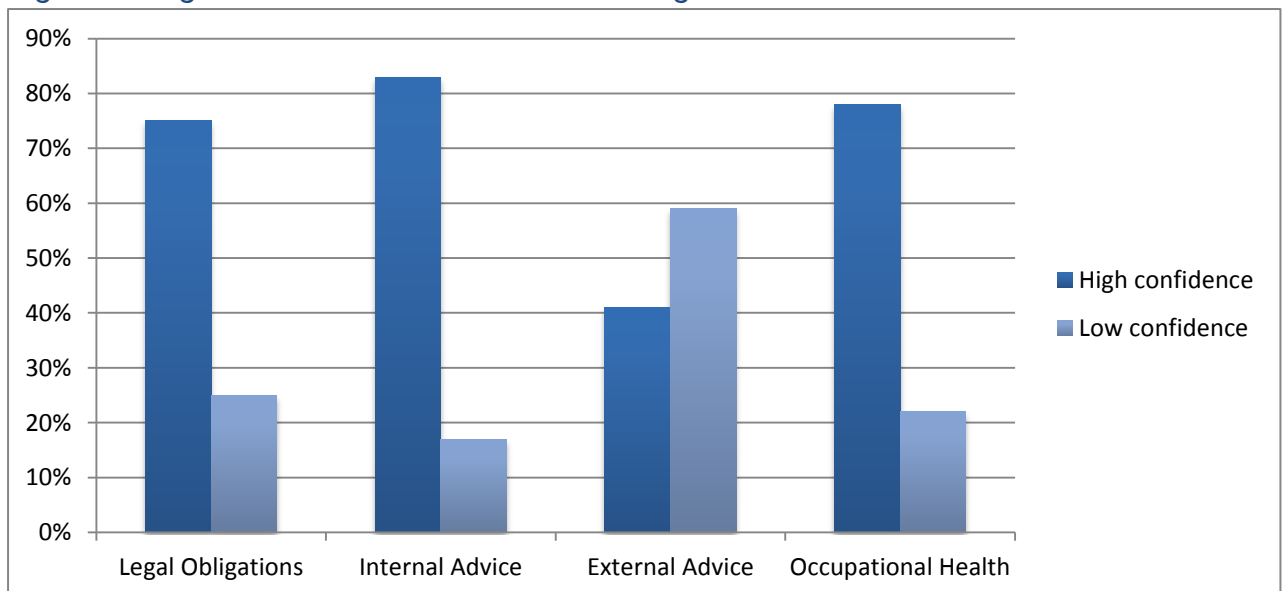


*Base: 112*

Tables 9- 12 reveal that public sector employers are much less confident than private and third sector employers about the extent to which staff, line managers and outsourced recruitment companies, have necessary knowledge. Close to one third of public sector organisations, for example, lack confidence about whether all staff, including line managers and outsourced recruitment companies, know their

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legal obligations about reasonable adjustments and about whether these staff will know where to access advice from within their organisation.

**Table 9: Confidence that all staff, including line managers and outsourced recruitment companies, know their legal obligations about reasonable adjustments**

|  | Private Sector | Public Sector | Third/Other Sector |
|---|---|---|---|
| Very confident | 20% | 14% | 21% |
| Mainly confident | 61% | 55% | 50% |
| Not sure | 15% | 20% | 29% |
| Not at all | 4% | 11% | 0% |

**Table 10: Confidence that all staff, including line managers and outsourced recruitment companies, know where to get advice from within the organisation about how to make reasonable adjustments**

|  | Private Sector | Public Sector | Third/Other Sector |
|---|---|---|---|
| Very confident | 37% | 23% | 43% |
| Mainly confident | 52% | 52% | 50% |
| Not sure | 7% | 20% | 7% |
| Not at all | 4% | 7% | 0% |

**Table 11: Confidence that all staff, including line managers and outsourced recruitment companies, know where to get advice from outside the organisation about how to make reasonable adjustments**

|  | Private Sector | Public Sector | Third/Other Sector |
|---|---|---|---|
| Very confident | 13% | 7% | 21% |
| Mainly confident | 24% | 36% | 29% |
| Not sure | 52% | 45% | 50% |
| Not at all | 11% | 11% | 0% |

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*Table 12: Confidence that all staff, including line managers and outsourced recruitment companies, know how to involve Occupational Health in determining appropriate adjustments for employees*

|  | Private Sector | Public Sector | Third/Other Sector |
|---|---|---|---|
| Very confident | 28% | 30% | 29% |
| Mainly confident | 54% | 44% | 50% |
| Not sure | 17% | 23% | 21% |
| Not at all | 2% | 2% | 0% |

Analysis was also undertaken of employers with different size workforces to determine whether smaller, medium or larger employers were more or less likely to have knowledge about how to facilitate the provision of appropriate adjustments and knowledge about where to access advice and guidance. The samples within different categories are ultimately too small to be reliable, although broadly speaking it appears that private sector employers with less than 1,000 employees tended to have lower levels of knowledge and confidence.
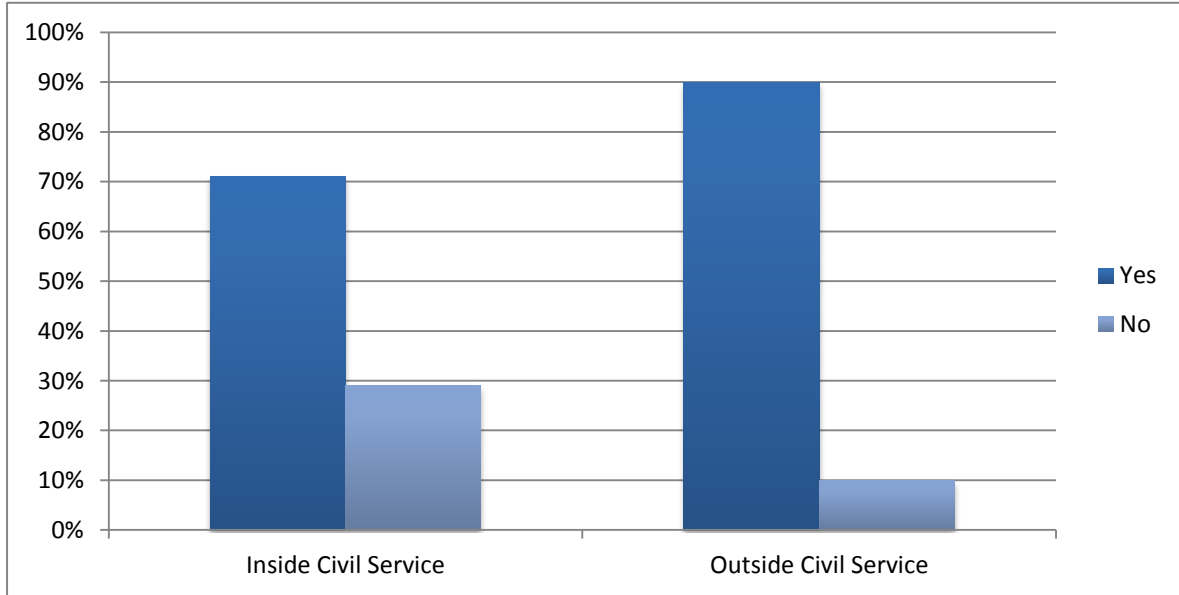
## 3c. Access to Work

The Government's Access to Work programme helps people with disabilities who wish to take up employment, or who are in work and experience difficulties related to their disability. Access to Work is a partnership with employers where the Government meets the additional costs associated with disability that go further than would be reasonable for an employer to meet. This includes, for example, grants to meet the costs of transport, support workers and job coaches.

Since the inception of the programme, more than 110,000 employees with disabilities have been supported to gain or remain in work and in so doing have been transformed into 'tax paying citizens' rather than 'benefits recipients'. The programme is open to all employees with disabilities (as well as trainees and apprentices) outside of the Civil Service.

Employers were asked about their knowledge of Access to Work. Knowledge of the scheme was high both outside and inside the Civil Service, with 90% of employers outside of the Civil Service aware of the programme and 71% of Civil Service employers aware of the programme.

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*Figure 8: Knowledge of Access to Work*



*Base: 124*

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# 4.  SUPPORT FOR EMPLOYEES WITH DISABILITIES

As noted in the introduction, key to dissatisfaction, staff absence and staff turnover is limited support for employees. Researchers Cooper and Dewe discuss some of the costs: stress, depression or anxiety account for 13.8 million days lost or 46% of all reported illnesses making this the single largest cause of all absences attributable to work-related illness.[19] They report:

> 'If the proportion of sickness absence that can be attributable to mental ill-health is estimated to be 40% of all absences, then this category alone would represent an annual cost of £8.8 billion. If 10–20% of this cost could be directly attributable to work causes, then sickness absence would cost employers £800 million to £1.6 billion a year.'[20]

On the extent to which performance management and progression systems operate fairly, the CIPD Employee Outlook (2014) provides fairly grim reading:

> 'Almost a third of employees believe that their current performance management systems are unfair, with a worryingly higher proportion of employees overall in the public sector believing their systems to be *unfair* as opposed to fair […] There are also concerns regarding progression across sectors but particularly in the voluntary sector, with more employees currently feeling that career progression is unachievable as opposed to achievable […]'[21]

For employees with disabilities, these systems tend to be even more challenging. ENEI report, for example, that more than a third of people show an unconscious bias against those with a disability. The report identifies that employees with disabilities are often disadvantaged by a lack of training and development opportunities. This is a result of line managers feeling uncomfortable talking to disabled people or having negative attitudes about their abilities and as a result not allocating stretching work or putting them forward for projects or promotions in the same way as their peers[22].

Figure 9 provides an overview of the proportion of employers with healthy workplace programmes, the extent to which disability is considered in professional development planning and employee engagement surveys and whether staff

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[19] Well-being- absenteeism, presenteeism, costs and challenges- Occupational Health Cooper and Dewe (2008)

[20] Ibid.
[21] CIPD, Halogen July 2014
[22] Disability: A Research Study on Unconscious Bias, ENEI, July 2014

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networks for employees with disabilities exist. Figure 9 reveals that for three in five employers these networks exist and disability is considered in employee engagement surveys and professional development planning. By comparison, healthy workplace policies exist in more than 90% of workplaces.

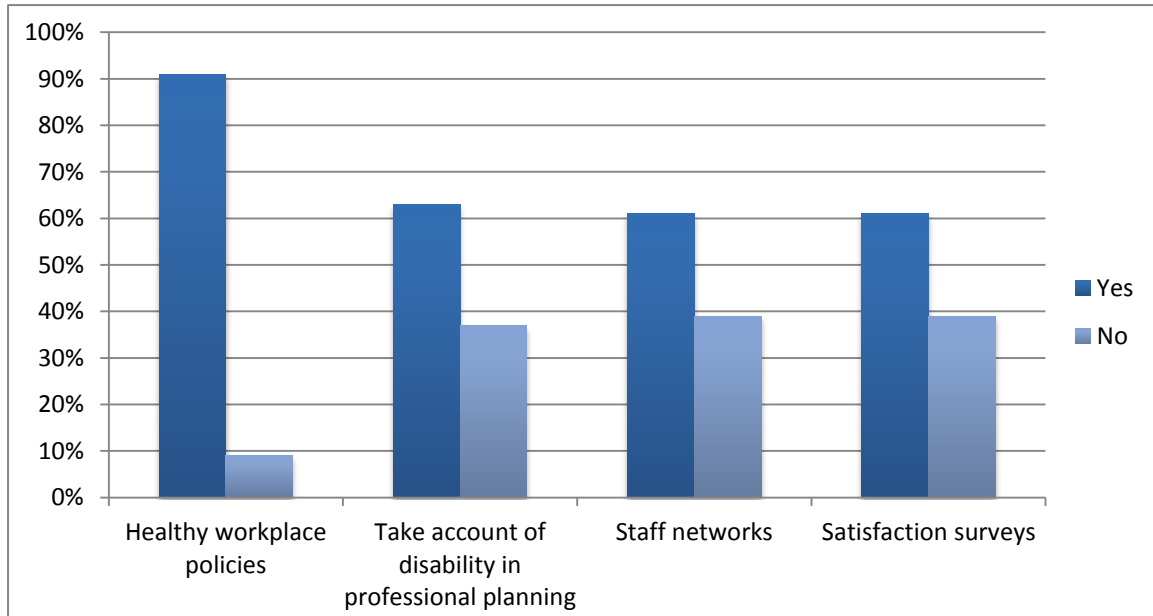*Figure 9: Specific support for employees with disabilities*



Table 13 sets out how different sectors have very different approaches. While third and private sector employers tend to rate better for taking account of a staff member's disability in professional development planning than their public sector counterparts, public sector employers rate significantly better for providing networks for employees with disabilities and for undertaking employee satisfaction surveys that take account of the perspectives of employees with disabilities.

*Table 13: Presence of support cross-sector*

|  | Private Sector | Public Sector | Third/Other Sector |
|---|---|---|---|
| Have 'healthy workplace' policies and programmes e.g. smoking cessation, discount gym passes etc. | 96% | 91% | 69% |
| Take account of staff member's disability in professional development planning | 65% | 57% | 77% |
| Networks or other types of peer support for employees with disabilities | 48% | 80% | 54% |
| Employee satisfaction surveys or similar (and these are broken down to show the different perspective of employees with disabilities) | 50% | 77% | 54% |

*Base: 111*

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# 5. ABSENCE RELATED MANAGEMENT AND RETURN TO WORK

Each year, Business Disability Forum answers thousands of diverse and highly specific queries about how disability affects organisations. Without exception, in any given year, one of the three most frequently asked questions relates to absence related management and return to work. Best practice suggests:

- Line managers are uniquely placed to spot signs about whether an employee has developed an illness which might be or become a disability. Common signs include persistent lateness, signs of discomfort or being in pain and poor or deteriorating performance.

- All absences should be recorded and line managers would do well to keep a note of absences in their own teams so that they are aware of any increases in short-term absences or patterns that might emerge.

- Disability related absence should be recorded separately from sickness absence. This helps minimise any potential legal and reputational risks from absences which might constitute a form of 'reasonable adjustment'.

- Line managers meeting regularly with employees to discuss reasonable adjustments and any signs or triggers might prevent someone going on extended sick leave. Preventing long term absence is in everyone's interest: 50% of people who go off sick for six months never return to work and for those who remain off work even longer, they almost always not return to work.[23]

- The shorter the absence from work, the more likely the employee will return to work. The more an employer remains in touch with an employee who is absent, the more likely they will return to work.  The willingness of the employer to provide flexibility for an employee about how they return to work, the more likely they will return to, and stay in work.

Figure 10 shows that more than 70% of employers have policies that distinguish between disability related absence and sickness absence and how to manage return to work and that line managers are capable of managing absence and return to work.

One in four employers are operating with higher levels of legal risk, however, by treating disability related absence and sickness absence the same. This risk is

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[23] Attendance Management and Disability, Business Disability Forum

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higher amongst public sector employers where two in five public sector employers treat disability related absence and sickness absence the same.

More than three quarters of employers also make clear that disability related harassment is unacceptable. Just over three in five employers also make specific provision for what should happen when an employee acquires a disability. This is an area that employers might prioritise work on, given that less than one in five people with disabilities were born with disabilities. We tend to acquire disabilities the longer we live and where most people acquire their 'first' disability during their working years[24].

*Figure 10: Absence related management and return to work policies*
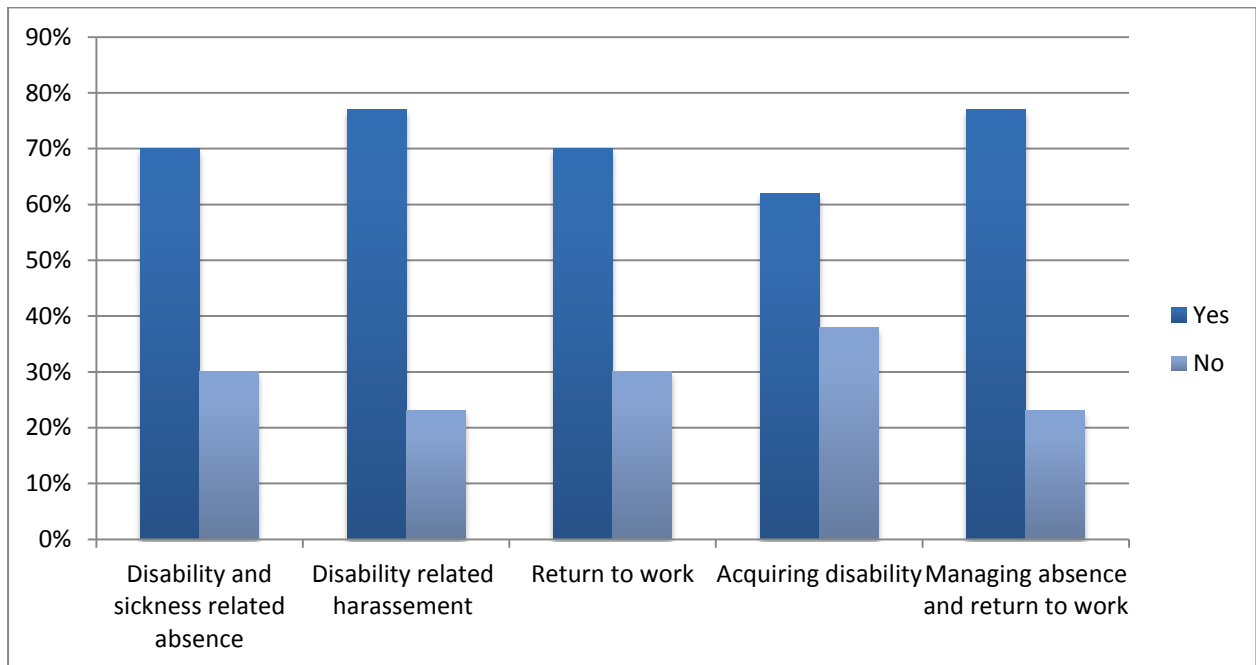


*Base: 108*

Table 14 reveals that public sector employers are somewhat less likely than their colleagues in the private and third sectors to have in place the good practices associated with managing absences and return to work.

Analysis was also undertaken of employers with different size workforces to determine whether smaller, medium or larger employers were more or less likely to have in place the policies associated with good practice in absence management and return to work. The samples within different categories are ultimately too small to be reliable, although it appears the larger a private sector employer the more likely good practice is in place.

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[24] Institute for Public Policy Research article Work for Disabled People (2002).

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*Table 14: Presence of policies cross-sector*

|  | **Private** | **Public** | **Third/Other** |
|---|---|---|---|
| Treat disability related absence differently to sickness absence | 76% | 61% | 77% |
| Specifically reference that disability related harassment and bullying is not acceptable | 80% | 70% | 85% |
| Have policies about returning to work after absence related to disability | 76% | 66% | 62% |
| Have policies about existing staff that might acquire a disability | 67% | 57% | 62% |
| Ensure line managers and staff know how to manage disability related absence and return to work | 86% | 64% | 85% |

*Base: 108*

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## CONCLUSIONS

This first state of the nation report reveals how prevalent good practices are within UK employers, particularly larger employers across the private, public and not-for-profit sectors, in retaining and developing employees with disabilities.

It is evident that there are some very good practices in many organisations. For example, it is encouraging that more than 19 in every 20 employers identify they have a workplace adjustment process. It is useful insight to recognise that employers with named retention leads for their employees with disabilities, generally have much better approaches to managing absence and return to work. Similarly, those organisations that tend to create more visibility as it relates to disability are also more likely to have in place good policies, specific support for employees with disabilities and more confident and skilled line managers.

In some ways these insights may strike as good common sense. If these do, that's great. Crucially, there are actions that all organisations can take which are low or no cost and can quickly motivate improvement. For example, including testimonials of employees with disabilities on recruitment webpages and profiling the contributions of employees with disabilities in organisation communications are simple ways to give visibility to disability within the organisation.

Similarly, developing a stand-alone disability related absence policy and clear guidelines for line managers about how disability related absence is managed (as distinct from sickness absence) is a 'quick win' that also helps manage legal and reputational risk. It also begins to 'de-medicalise' disability within the workplace which, when reinforced with a good workplace adjustment process, refocuses the organisation towards what enables all employees to be productive and successful at work. The 5-actions for all employers are:

**Action One: Increase visibility of disability within the organisation.**

**Action Two: Build the skills and confidence of line managers to effectively manage their team members with disabilities.**

**Action Three: Have consistency in how policies are implemented that impact disability.**

**Action Four: Have a good workplace adjustment process.**

**Action Five: Provide targeted development opportunities for employees with disabilities.**

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If all employers can take the '5 actions for better retention of employees with disabilities', not only will the Government's ambition of reducing the unacceptably high rates of unemployment amongst disabled people be achieved, but employees with disabilities will be developing and progressing within their roles and careers. Business will do better too as they reduce the stubbornly high costs of staff absence, low productivity and staff attrition.

This research report represents a beginning. Further work is underway to delve deeper into key findings and so animate further the perspectives of line managers and employees with disabilities. Work is also ongoing in developing practical advice and guidance to help employers improve skills, confidence, systems and processes that impact the retention and development of employees with disabilities within their organisations. We look forward to bringing you further insights and practical advice in coming months.

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## Appendix: Methodology, sample profile and limitations

### Methodology

This is Business Disability Forum's first survey into the 'state of the nation' in recruiting, retaining and developing employees with disabilities. Over April and May 2015, employers were invited to fill out an 8-page, 18-question survey on themselves and their retention practices. This data was then collected and presented to show how widespread best practice is across the UK, cross-sector and in employers of different sizes.

### Sample profile

145 employers responded to the survey, of which 95 chose to disclose their identity.

Employers were asked whether they were private sector (46%), public sector (40%) or third/other sector (13%). Third/other groups together voluntary sector employers, or employers that felt they did not fit into the other characters, such as individual consultants.

Employers of all sizes responded, with the largest concentration being employers with about 1,000 staff. The size categories were:

- 100,000 staff members (8%)
- More than 50,000 staff members (7%)
- More than 10,000 staff members (15%)
- More than 1,000 staff members (52%)
- 100-999 staff members (13%) and
- Under 99 staff (4%).

E asked where in the UK they held their main base of operations, with the possibility of selecting more than one response. The breakdown was as follows: Across UK (46%), London (29%), Midlands (8%), North East (2%), North West (8%), Northern Ireland (2%), Scotland (5%), South East (10%), South West (9%), and Wales (17%).

### Limitations

There are a number of limitations to this data. Firstly, the sample size is relatively small when there is segmentation especially in relation to the size of the workforce. There is also a much stronger bias towards larger organisations within the sample so caution should be exercised in generalising these results across small and medium size enterprises.

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## BDF Partners

| | |
|---|---|
| Accenture | HM Revenue and Customs |
| Allianz | Home Office |
| American Express | HSBC |
| Atos | Kingfisher plc |
| AvePoint | KPMG |
| Bank of America Merrill Lynch | Lloyds Banking Group |
| Barclays | Lorien Resourcing |
| BBC | Microlink PC |
| BP plc | Ministry of Defence |
| BT | Motability Operations |
| CGI | National Crime Agency |
| Cisco Systems | Nationwide Building Society |
| de Poel | NHS Scotland |
| Deloitte | Nuance |
| Department for Transport | PricewaterhouseCoopers |
| Department for Work and Pensions | Royal Bank of Scotland Group |
| Enterprise Rent-A-Car | Royal Mail Group |
| Environment Agency | Sainsbury's |
| EY | Santander |
| Fujitsu | Shell International Ltd |
| Gender Gap | Sky UK Ltd |
| GlaxoSmithKline | Standard Chartered Bank Plc |

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**Accessibility Statement**

Business Disability Forum is committed to ensuring that all its information, products and services are as accessible as possible to everyone, including disabled people.

If you wish to discuss anything in regards to accessibility or if you require alternative formats please contact Gary Francis.

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**Business Disability Forum (BDF)** is a not-for-profit member organisation that makes it easier and more rewarding to do business with and employ disabled people. BDF provides pragmatic support by sharing expertise, giving advice, providing training and facilitating networking opportunities to support organisations become fully accessible to employees with disabilities, candidates and customers.

Working with business and public sector organisations for more than 20 years, BDF has a membership of more than 300 large corporate and public sector employers that, together, account for close to 20% of the UK workforce. This includes 140 companies which are multinational including some of the UK and world's best known brands in energy, financial services, telecommunications, retail, transport, professional services, IT, outsourcing, retail, manufacturing and recruitment companies.

BDF's Disability Standard is the only whole-organisation tool to driving improvement in disability performance across an organisation. Developed collaboratively with our Partners and Members, the Disability Standard offers the best way of checking how disability-smart your organisation is, right across your business.