



INSTITUTE OF PUBLIC ACCOUNTANTS GROUP

# Diversity and Inclusion Action Plan

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The IPA acknowledges the Traditional Owners of the lands on which we live and work. We pay our respects to Elders past and present and recognise the important contributions that First Nations peoples make within our communities.

# Note from the President and CEO

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Over the past 99-years, the Institute of Public Accountants (IPA) has developed strong community connections both within Australia and Internationally. We've branched out into China, the United Kingdom, and other overseas markets to become a global professional accounting organisation.

We strive for strong engagement and pride ourselves on the positive social and economic impacts the IPA Group and its members have on small business.

As an international organisation, we recognise the platform we have for engagement and influence, understanding and accepting our responsibility to promote and embrace diversity, equity, and inclusion.

We seek not only to empower our members, but also to assist them to uplift their clients and communities. Leveraging these connections and relationships enables accountants to nurture an inclusive culture that welcomes and celebrates diversity.

Through the release of the IPA Group's Diversity & Inclusion Action Plan, we are honoured and proud to celebrate the differences in our people. We will listen, advocate, and lead by example to build the best professional and connected community.

By challenging processes, and encouraging innovation and creativity, we will continue to lead growth and support the IPA Group through transformative change.

The IPA Group commits to the 40/40/20 gender balance across all levels of the organisation by 2025. Furthermore, we will support the People and Wellbeing working group on diversity initiatives beyond gender.

This plan is a commitment to our community, our members, our stakeholders, and our people.



**Julie Williams FIPA FFA**  
President, Institute of Public Accountants

**Prof. Andrew Conway FIPA FFA**  
Chief executive officer, IPA Group

# Our Why, Vision & Values

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## OUR WHY

### To improve the quality of life of small business.

Small businesses are strengthened by the diverse range of people who run them and work in them. Therefore, prioritising inclusion at the IPA to improve overall life quality and a sense of belonging, helps us ensure our community is better equipped to fulfil our reason for being.

## OUR VISION

### For every small business to have one of our members by their side.

An engaged, diverse membership base is essential for the IPA to be trusted advisers and by the side of every small business. Inclusivity fosters an environment for every small business, irrespective of their characteristics and differences, to have a safe space for advice and counsel.

## OUR VALUES

### RESPECT



As a global accounting body with a multicultural membership base, our ability to create a safe and welcoming environment for all is critical for a positive member experience.



Consideration of all staff members in their professional and personal lives, and where possible, providing flexibility tailored to their circumstances, beliefs and other commitments.



Leveraging technology to maximise the accessibility of office spaces for staff, internal and external communications, and member events.



Attracting diverse talent, fostering an inclusive environment to retain this talent and make everybody well welcome and part of the IPA family.



Acknowledging that while we are on the same team, everybody has unique experiences and situations. Therefore, we strive to provide a welcoming environment that embraces difference and diversities.

# Glossary of Terms

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## **ALLYSHIP**

Allyship is the practice of building constructive and collaborative relationships to tackle systemic injustices. Allies are advocates of equity, looking inwards at culture, policies, hiring strategies, and general behaviour to drive fair outcomes in the workplace.

## **BELONGING**

Belonging is the outcome when you have successfully managed diversity, equity, and inclusion. Employees with a high sense of belonging feel accepted, valued, and comfortable to build and maintain relationships in their workplace.

## **CULTURE**

Organisational culture refers to the tangible and intangible signals, values, beliefs, and expectations that shape and influence the interactions, motivations, and behaviours of team members in the workplace. Put simply, it's the way things get done here.

## **DIVERSITY**

Diversity refers to the variety of traits and characteristics between people in an organisation.

Diversity in an organisation can be defined at two levels, social identity, and professional identity.

Social identities are characteristics and circumstances that make us who we are. These include age, gender identity, ethnicity, identifying as Aboriginal and/or Torres Strait Islander, (dis)ability, sexual orientation, religion, socio-economic background, values, and personalities.

Professional identities encompass a person's education, work preferences, aspirations, ways of thinking, learning styles, communication styles, functional area, and organisational level.

These aspects come together in a unique way for each individual and shape the way they perceive their workplace, as well as how others view and treat them.

## **EQUITY**

Equity is about creating fair access and opportunity for every employee, acknowledging structural impediments and the fact that not everybody comes from an equal playing field. It is the employer's conscious attempt to identify and remove any barriers that prevent equal participation in the workplace.

## **INCLUSION**

Workplace inclusion refers to the efforts of an organisation to foster a culture in which employees feel comfortable to express who they are, encouraging a psychologically safe environment. It's a place where everybody can bring their whole self to work with a shared value of respect.

## **PSYCHOLOGICAL SAFETY**

A psychologically safe work environment is one in which all team members feel welcome to participate, provide constructive feedback, and make mistakes without fear of retribution. Fostering this environment enhances feelings of being valued and respected, contributing to a sense of belonging.

# People and Wellbeing Working Group

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**Naomi Knight**

Group Executive People and Wellbeing

**Andrew Conway**

Group Chief Executive Officer

**Brett Maloney**

Chief Operating Officer

**Deja Claydon**

EA to the CEO

**Jane Capaldi**

Head of Operations (UK)

**Julie Williams**

IPA Group Board Chair

**Trang Le**

Finance Manager

# Key Areas

The following key areas have been adopted from the IPA People Strategy and shape our action plan by ensuring all aspects of the business are considered and prioritised.

- Our People
- Our Commitment
- Our Leaders
- Our Members

## Our People

Action	Year Target	Responsibility
Considering the timing of meetings involving people with family or carer responsibilities or who work part-time hours, especially when different time zones apply.	2022	Group Executive, People & Wellbeing, Head of Operations (UK)
Introduce flexible public holidays to allow staff members to celebrate days that are culturally significant to them.	2023	Group Executive, People & Wellbeing
Promote inclusive leadership and advancement opportunities which actively supports people to manage their work and life responsibilities, ensuring no bias towards geographical location and family composition.	2023	Group Chief Executive Officer, Group Executive, People & Wellbeing
Promote cultural literacy education to ensure respectful, accurate, relevant, and inclusive language is embedded in our internal communications, training, recruitment, and governance practices.	2023	Group Executive, People & Wellbeing, Head of Operations (UK)
Provide opportunity for all staff to further their diversity, equity, and inclusion awareness.	2023	Group Executive, People & Wellbeing, Head of Operations (UK)
Address any identified gender pay gaps through an annual remuneration review addressing any systemic biases.	2023	Group Executive, People & Wellbeing, Head of Operations (UK)
Support social inclusion practices to guarantee equal access for people with disability.	2024	Group Chief Executive Officer, Group Executive, People & Wellbeing, Head of Operations (UK)

# Our Commitment

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Action	Year Target	Responsibility
Have a zero tolerance towards discrimination, harassment, and bullying and ensure continued education to reinforce expectations. Embrace the value of inclusive language and set expectations for acceptable behaviours to avoid harmful labels and stereotypes.	2022	<i>IPA Group Board Chair, Group Executive People &amp; Wellbeing, Head of Operations (UK)</i>
Acknowledge the different learning and working styles of our team members and align internal communication methods to be both verbally and non-verbally inclusive and adaptive.	2022	<i>Group Chief Executive Officer, Group Executive, People &amp; Wellbeing</i>
Attain a baseline of internal diversity analytics, to better understand our people and obtain meaningful data to set targets towards our future.	2022	<i>Group Executive, People &amp; Wellbeing</i>
Conduct a review of people-related policies to ensure they are free from bias and promote diversity, equity, and inclusion, rather than the avoidance of harm.	2023	<i>Group Executive, People &amp; Wellbeing</i>
Extend the Board of Directors' interview questions and annual skills matrix process, to capture diversities beyond gender and experience.	2023	<i>IPA Group Board Chair, Group Chief Executive Officer</i>
As a principle all decisions relating to recruitment, appointment, and career development are not based exclusively on merit but rather on providing all candidates and employees with an equitable opportunity to explore their career aspirations.	2023	<i>Group Executive, People &amp; Wellbeing</i>
Expand and promote corporate policies for employees experiencing domestic and family violence to include relevant safety measures, education, resources, and financial assistance.	2023	<i>Group Executive, People &amp; Wellbeing, Chief Operations Officer, Finance Manager</i>

# Our Leaders

Action	Year Target	Responsibility
Promote a consultive and collaborative process for internal decision making, enabling all team members to make valued contributions and provide feedback without fear of retribution.	2023	IPA Group Board Chair, Group Executive People & Wellbeing, Head of Operations (UK)
Articulate an accessibility action plan to address equal participation regarding recruitment, office amenities, system design among other measures.	2023	EA to the CEO, Sustainability and Policy Advisor
Implement targeted supports for employees at different life stages in their careers (graduate, parent, mature age, seniors). Achieve family friendly workplace certification.	2024	Group Executive, People & Wellbeing
Attain a 40% female/40% male/20% any gender balance in our governance, our leaders, and our people.	2025	IPA Group Board Chair & Group Executive, People & Wellbeing

# Our Members

Action	Year Target	Responsibility
Embed our member code of conduct to promote positive professional conduct and ensure an inclusive environment at IPA related events.	2022	Group Chief Executive Officer, Group Executive, People & Wellbeing
Update internal member management system to reflect gender diverse prefixes and identification.	2022	EA to the CEO, Sustainability and Policy Advisor
Develop CPD courses and education opportunities to continuously update members on Diversity, Equity, and Inclusion (DEI) topics.	2023	TBA
Attain a baseline of our membership diversity statistics; to better understand our members, obtain meaningful data to set targets, and build our member networks.	2023	TBA
Encourage a diverse range of voices to contribute towards decision making in our Governance, CPD, Partnerships, and operational practices at the IPA.	2025	Group Chief Executive Officer, Chief Operating Officer, Head of Operations (UK)

We will continue to consult, collaborate, and seek advice from internal and external stakeholders to ensure our changes are having a positive impact on members and the community. We will continue to grow and thrive as an organisation.

We look forward to achieving the listed actions by the end of 2025 and we commit to continuing to find opportunities to benefit and connect our people and small businesses.

The People and Wellbeing working group will be reporting frequently to our Board of Directors on the progress and ensure accountability for our commitments.

## Our Progress

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### Reconciliation Action Plan

The IPA has released its first Reflect RAP, acknowledging reconciliation as a journey and outcome that is strongly linked with our value of RESPECT. This journey will lead us to develop relationships with First Nations stakeholders in our local areas, as well as motivate us to foster culturally competent workplaces that are safe and welcoming for the employment of Aboriginal and Torres Strait Islander peoples.

‘The extensive and heartfelt discussions that have taken place, together with the IPA’s commitment to hold itself accountable for being accessible, connected, and welcoming for Aboriginal and Torres Strait Islander people, is an important step in the Reconciliation process.’ – Tory O’Brien



IPA RECONCILIATION ACTION PLAN (2022)