

Morris Owen
Regulator Number: C005394193
ICAEW Diversity Data Commentary - 2021

All firms accredited for probate services are required to collect, report, and publish data about partners and staff on the firm's website and report this to ICAEW.

We welcome diversity and the benefits that it brings to the firm and seek to employ suitable partners and staff regardless of age, gender, ethnicity, and belief.

In completing the survey this year, the decision was made, because of remote working due to COVID, to change the methodology used to collate results and we opted to use the Rliance Website survey.

In the main, the results of the 2021 survey were in line with previous surveys undertaken albeit some questions gave different results to previous years, ostensibly we believe that questionnaires were, in part, completed erroneously. Whilst our preference would have been to re-run the questionnaire in line with previous practice, after discussion with the ICAEW, we were told to accept the responses as provided.

The nature of the data received has led us to question the validity of some of the responses received and the conclusions we can draw from them, and we have decided that we will change back to our previous methodology to obtain this information in the future so as to remove the likelihood of error in the results.

From a review of the overall results, subject to the issues raised above, the one point highlighted is the lack of diversity with regard ethnicity and religion, albeit there can be a causal link between the two matters.

We have considered this and would highlight that if our last round of recruitment had been successful, this statistic would have changed and been more in line with the demographics for Swindon. However, due to COVID, recruits changed their mind about accepting our job offers.

Accordingly, we are satisfied that the make-up of the firm is broadly in line with the local demographic and our policies and procedures are fit for purpose.