Defence Inclusivity Phase 2: The Lived Experience Final Summary Report

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1. ISSUE

The benefits of having a diverse and inclusive organisation are well-documented and compelling. The Ministry of Defence (MOD) understands these benefits and acknowledges the direct contribution of Diversity and Inclusion (D&I) to operational effectiveness in its Defence D&I Strategy (2018-2030). However, achieving a diverse and inclusive workforce presents a challenge for a host of reasons and the MOD still struggles to recruit and retain people from backgrounds not traditionally associated with Defence, such as females and Black Asian and Minority Ethnic (BAME) personnel.

2. AIM OF THE RESEARCH

The MOD (through the Defence Science and Technology Laboratory) commissioned a robust Whole Force qualitative study (unprecedented in scope and scale) to better understand the Lived Experience[1] of females and BAME personnel, in comparison with the white male majority. Specifically, the research was designed to address the following research questions:

- To what extent do gender and ethnicity influence the Lived Experience of MOD personnel?

- What are the positive aspects of the Lived Experience and how can these be exploited?

- What are the negative aspects of the Lived Experience and how can these be addressed?

- How can these findings be interpreted in light of theories/literature on minority representation in organisations?

3. FINDINGS

Being female and/or BAME negatively impacts the Lived Experience: Gender and ethnicity were found to negatively impact the experiences of MOD personnel to a large extent, with BAME females facing the most challenges. However, gender and ethnicity were not the only characteristics that impacted people's experiences. Other factors (such as social class, age, position within the organisation) were also found to have an effect.

Positive aspects of being female and/or BAME were noted: Some positive aspects of being female and/or BAME within Defence were noted, such as being visible and recognisable/memorable by senior leaders. Females and BAME personnel often felt that Defence provided them with social and economic mobility and better opportunities than other organisations.

A white male prototype is pervasive and undermines inclusion: A white male prototype, often characterised by alpha male traits (dominance, assertiveness, a strong physicality etc.) was perceived to be pervasive across Defence (particularly in the military) and undermined efforts to change internal climates. This impacted white males who did not conform to this norm, as well as females and BAME personnel. All found it harder to fit in than those fitting the white male prototype and reported challenges developing and maintaining their sense of belonging and advancing their career.

Issues faced by/experiences of minority groups are often unseen: White males were sometimes 'blind' to the issues faced by minority groups, suggesting disadvantage as a function of gender or ethnicity was no longer a problem. White males did not perceive female and BAME under-representation to be a current barrier to their inclusion or progression; the MOD was viewed as a meritocracy in which everyone could progress, thus failing to recognise structural barriers or their 'white male privilege'.

Some open resistance to D&I exists: Some military white males (particularly in the Royal Marines and Army) were resistant to females joining previously male only units raising concerns that increased female participation equated to a lowering of (physical) standards. Others (white males)

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[1] The term 'Lived Experience' refers to a person's first-hand experience in everyday events.

expressed resentment that scarce resources were focused on D&I issues at the expense of other, more critical areas (e.g. equipment).

Discrimination in various forms persists: More blatant forms of discrimination towards females and BAME personnel were found to have been largely replaced with subtler, latent, behaviours such as being ignored, excluded, overlooked, questioned, micromanaged or not cooperated with. However, blatant racist and sexist behaviours were still found to exist within Defence, and often remained unchallenged.

Evidence of structural discrimination:[2] Unintended consequences associated with policy implementation leading to unfairness were uncovered. In particular, evidence of structural discrimination impacting on females and BAME personnel was apparent. A lack of investment in infrastructure and equipment, impacted to routinely exclude females, whilst MOD budget cuts were perceived by those on lower salaries (often, but not exclusively, females and BAME personnel) to disproportionately affect them because of their structural location within the organisation. In addition to this, in the absence of workforce planning that takes account of the resource implications of policies designed to improve working conditions for some, others reported having to shoulder that resource shortfall (e.g. covering maternity leave) to the detriment of their own lived experience. This was sometimes found to breed resentment and resistance to change within majority groups.

Leaders have a pivotal role to play in creating an inclusive environment: Leadership was perceived to be accountable for inconsistent messaging and responses. Senior leaders were seen as representing one of two extremes: passionately engaged and roles models for good behaviours or paying lip service to D&I. Line management/the Chain of Command was pivotal in determining how inclusive working environments were by accepting (or not) inappropriate behaviour (noting that sometimes the poor behaviour came from managers).

4. FURTHER INFORMATION

Detailed study findings can be found in the main Technical Report[3]. The findings are presented in the Main Technical report at different levels (from a high level summary through to a more detailed exploration of the data) to aid understanding. Specifically the data is reported by:

- A summary response to the research questions.

- Key findings (as outlined in Section 3 above).

- New insights and enduring topics.

- Theme (see Figure 1 for the nine themes which were uncovered during data analysis).

The division of the findings by new insights or enduring topics has been used to aid understanding of which findings are new/unseen and therefore not fully appreciated and/or addressed, and those which either reinforce existing research evidence or reflect what is generally known and understood by Defence. Enduring topics warrant attention as they present as persistent issues not yet fully resolved. For example, a new insight uncovered through the study was that paternal figures were found to be shaping females' careers. Some white, military females, whose fathers had previously served, were discouraged by them from joining certain Services/branches of the Armed Forces for fear of isolation or negative treatment. Once within the MOD, females reported that they often experienced patriarchal management styles. Whilst well-intentioned, the detrimental impact of this protection could sometimes be career limiting. An example of an enduring topic is the challenges that personnel who are parents continue to face in balancing their work and their home-life. In particular, the demands of Service life (long hours, deployments, frequent changes in post and location moves) were often being appraised by participants as incompatible with family life. As

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[2] Structural discrimination is seen to occur when policies of the dominant race/ethnicity/gender and those who control and implement them are neutral in intent, but nonetheless discriminatory in application (see Pincus, 1996).
[3] [REDACTED].

the primary caregiver, females often made the greatest career sacrifices to achieve a work-life balance.

Finally, the data are also presented by the nine themes. This provides a more detailed and nuanced exploration of the findings.
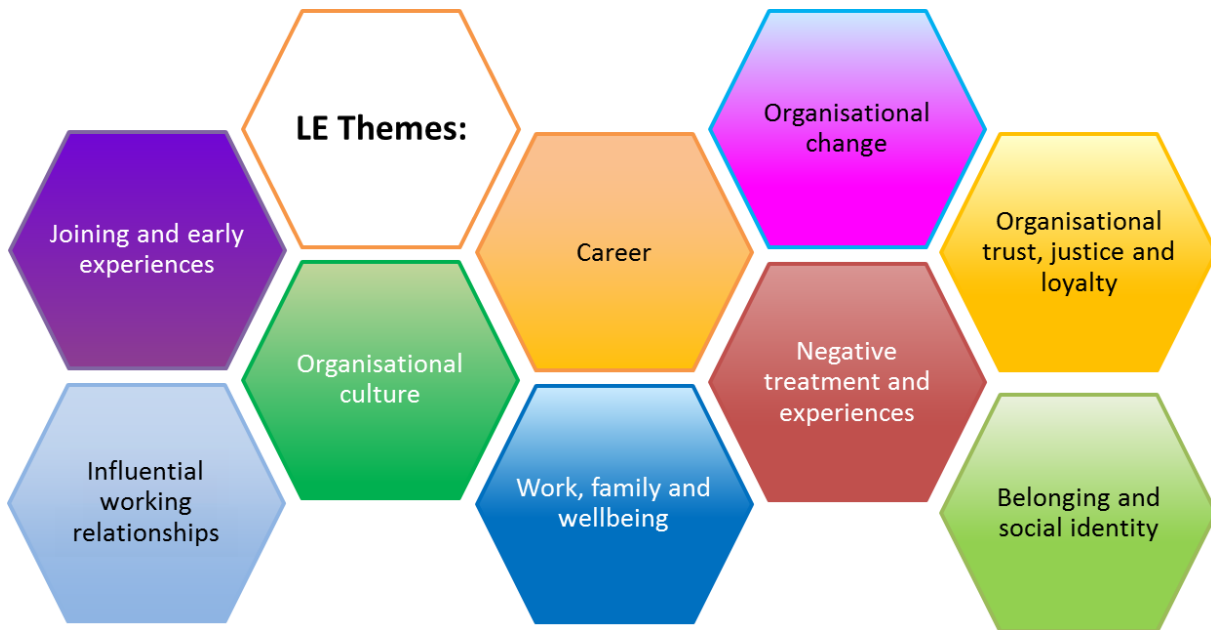

LE Themes:

- Joining and early experiences
- Organisational change
- Career
- Organisational trust, justice and loyalty
- Organisational culture
- Negative treatment and experiences
- Influential working relationships
- Work, family and wellbeing
- Belonging and social identity

Figure 1: Themes

5. OPTIONS FOR ACTION

The literature suggests that there is no 'one size fits all' solution to addressing D&I; whilst some approaches might be suitable in some contexts they are less suitable in others. Consequently, the best approaches are those that are tailored to the specific organisation. That said, there are some underlying principles that apply across organisations (evidenced by [REDACTED][4]), which should be considered before embarking on any approach to diversity management to effect positive change. These relate to:

- Leadership (the importance of support and leadership from the top).

- Vision (clarity of vision and objectives).

- Policies (establishing clear policies and standards).

- Staff engagement (involving staff in the change process).

- Culture change (not accepting bad behaviour).

- Resources (investing resources in addressing the issue).

A list of six focus areas with suggested options for action were determined by the research-practitioner team. They were derived from the key principles for change in conjunction with the specific findings from this research, evidence from the literature, insight into what other organisations have done to address similar challenges[5], and the expertise of the research team. It is important to note that the different components of the Whole Force are in different stages of change and the findings have shown that, in some cases, the MOD needs to operate differently across different groups (i.e. by Service/Civil Service).

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[4] [REDACTED]

[5] Whilst initiatives utilised by other organisations were considered, these were not formally evaluated; therefore, their impact is not always clear.

The six focus areas are as follows (more detail can be found in the main Technical Report):

1. **Cultural change:** To become a fully inclusive organisation Defence needs to move away from adapting current processes/policies to allow females and BAME personnel to 'fit in' to the existing structure, to creating a genuinely inclusive environment where everyone has a place. To deliver this, diversity should be considered in its broadest sense, not just focusing on protected characteristics. As found in this study, anyone (including some white males) who did not fit the white male prototype, often characterised by alpha male traits, experienced challenges fitting in. More radical (for hierarchical organisations) organisational changes, such as adopting a flatter structure or amending the career pathway/commissioning structure within the Armed Forces are required to enable minority groups to obtain higher ranks and become role models to others.

2. **Organisational communication:** The benefits of D&I were not well understood by participants and some saw D&I as an issue only for minority groups. Coupled with this, were misconceptions about D&I practices (such as the MOD positively discriminating in its recruitment and selection practices) which were being perpetuated within Defence. Making the issue of D&I more visible e.g. through expanding the reporting of D&I statistics to include interactions in minority characteristics, removing gendered language in organisational communication, myth busting and addressing misconceptions (particularly with regards to concerns around the changing of physical standards in relation to the front line role of military females) through top-down communication have been identified as actions that could be taken to have real impact on understanding around D&I.

3. **Recruitment, selection and induction:** A number of challenges with the recruitment, selection and on-boarding processes within Defence were identified; they were sometimes found to be exclusionary or, at worst, discriminatory towards minority groups. Although some of these issues have been, or are in the process of being, resolved, it is vital that the effectiveness of these changes are monitored and evaluated to assess their impact on females and BAME personnel at one of the most influential touchpoints of the employee lifecycle. Investing additional resources in other changes could positively impact the experiences of minority groups. For example, investigating whether the vetting process could be 'sped up' and/or reviewing the level of security clearance required for all roles and opening up job opportunities to a wider pool of candidates would particularly benefit BAME personnel.

4. **Leadership and management:** Whilst senior leaders and managers were found to be pivotal to the creation of an inclusive environment, they did not always behave in ways consistent with supporting and improving D&I. Senior leaders must take action to demonstrate visible and sincere commitment to D&I. Managers need to role model and reward alternative ways of operating, by males and females, thus challenging the dominant alpha male mode of behaviour. Both senior leaders and managers should be perpetual advocates of D&I, role model good behaviours and call out those that are inappropriate. Guidance provided for senior leaders in the Defence D&I Strategy (2018-2030) should be followed. It is suggested that D&I should be mainstreamed within all leadership training. Greater emphasis should be placed on values early on induction/training making sure that instructors in Phase 1, in particular, are bought into D&I and act as role models so that a very clear and positive message is relayed from the start.

5. **Policy and practice:** Defence policies were often viewed positively and improvements had, and were continuing, to be made (e.g. introduction of the Armed Forces Flexible Working Act). However, a clear gap between policy and practice exists. Suggestions for improvements include: reviewing existing policies and practices (e.g. review the application of policies across Defence to ensure that they are being implemented fairly); and, implementing new approaches (e.g. the introduction of anonymous Armed Forces promotion boards for Officers and Other Ranks, where names and gender identifiers are removed from reports to reduce bias).

6. **Education and training:** Education and training was a key area for improvement emanating from the research. Recommended actions for change range from increased opportunities to improve cultural competency for personnel less familiar with some minority communities to suggested improvements to D&I training; taking it out of the classroom (and offline) and making it interactive and practice-based.

Whilst the literature suggests that attention should be paid to all six areas, the one likely to have most significant impact on improving D&I is 'culture change'.

6. TECHNICAL SUMMARY

Limitations of previous research: Prior research relating to D&I issues exists but has typically been small-scale, segmented (with more known about issues pertaining to the Regular Service compared with Reservists and Civil Servants) and largely quantitative (with data typically gathered via questionnaires) in nature. In recognition that an alternative approach was required to reveal deeper, more subtle insights and to provide fresh thinking on the topic, a Whole Force, qualitative study was scoped, designed, piloted and implemented over the course of four years.

The benefits of a qualitative approach: Qualitative research is well established in the social sciences domain; it is a widely used and highly valued means of exploring the social world. Qualitative approaches can elicit the range of issues that underpin a topic therefore allowing a depth of understanding about the subject to be captured. This differs to quantitative approaches which typically seek to understand the prevalence of a phenomena using statistical analysis of numerical data. Whilst these are complementary approaches (one is not superior to the other) qualitative data is sometimes dismissed as being 'anecdotal evidence' or 'individual perceptions' rather than reality. However, it is essential to highlight that an individual's perception of a situation is their reality; it is valid because it informs their experiences. The rigour of qualitative research comes from its iterative nature and critical reflection. Qualitative research can produce a wealth of data whilst maintaining context. Nuances within the data are more likely to be uncovered in qualitative studies compared with other approaches (see Silverman, 2001[6], Blaikie 2009[7], Robson, 2011[8]). Aggregate analysis of individual experiences and perceptions therefore provides a rich dataset from which recurrent themes or 'patterns' can be identified and a valid basis upon which actions for change can be identified. With this in mind, it is important to be aware that qualitative approaches are well used in the MOD and wider government. Such studies have provided robust and rich evidence to support significant policy and procedure change across a wide range of issues. In this context, a qualitative study which delivered a nuanced and context laden understanding of factors affecting the experiences of MOD personnel was needed.[9]

Technical approach: The work described here used a qualitative, cross-sectional design to explore the Lived Experience of Armed Forces personnel (Regulars and Reservists) and those in the Civil Service. Data were gathered via face-to-face/telephone/video-call interviews with females and BAME personnel, as well as the white, male majority[10]. Data were obtained from white males to enable group comparisons to be made and to provide confidence that findings were attributable to differences in gender and/or ethnicity rather than being an issue faced by all personnel equally. Personnel were selected to take part based on demographic information, ensuring a variety of experiences were captured from personnel across the course of the Human Resource lifecycle; from personnel who had recently joined through to those who had put in their notice to leave. A total of

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[6] Silverman, D. (2001). Doing Qualitative Research: A practical Handbook, London: Sage.

[7] Blaikie, N. (2009). Designing Social Research: The Logic of Anticipation, 2nd Edition, Cambridge: Polity Press.

[8] Robson, C. (2011). Real World Research, Chichester: Wiley.

[9] The robustness of the qualitative data was assured through the use of Tracy's (2010) eight 'big tent' criteria which include: worthy topic; rich rigor; sincerity; credibility; resonance; significant contribution; ethics; and meaningful coherence.

[10] The employee group who identify as 'white' as a racial classification specifier and 'male' as a sex classification specifier where being white and male is the most common, or majority, employee group.

405 interviews were conducted over the course of a year (from June 2017 to June 2018); these were recorded and transcribed (or detailed notes were taken in lieu of recording). The research team analysed the data using thematic analysis (identifying nine themes from the data, as per Figure 1), interpreting the findings in light of the wider Defence context, previous related research/literature and relevant theoretical models.

7. CONCLUSION

Whilst some positive aspects of being female and/or BAME within Defence were noted, across the Whole Force, not fitting the white male mould was found to be significant contributor to the negative experiences and organisational barriers that personnel (females, BAME and some white males) faced.

This study has unearthed a number of new insights as well as adding further support to existing research evidence. Suggested options for action to improve D&I with Defence have been made. Ultimately, it is suggested that Defence needs to take sustained action and invest resource to realise positive change; D&I will not improve organically over time without targeted action and investment.

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7a. Abstract: *

The Ministry of Defence (MOD) understands that a diverse and inclusive organisation is a stronger, more cohesive and resilient one. However, despite continued efforts, The MOD recognises that it struggles to recruit and retain people from backgrounds not traditionally associated with Defence, namely females and Black Asian Minority Ethnic (BAME) personnel. The MOD commissioned a Whole Force qualitative study (unprecedented in scope and scale) to better understand the day-to-day experiences of females and BAME personnel (in comparison with the white male majority) to inform actions to improve the representation of these minority groups across Defence. Data were gathered from 405 participants (Regular, Reserve and Civil Servant) via one-to-one interviews. The study found that whilst gender and ethnicity did impact the experiences of MOD personnel to a large extent they were not the only characteristics that differentiated people's experiences. Whilst some positive aspects of being female and/or BAME within Defence were noted, gender and ethnicity were found to be significant contributors to the negative experiences and organisational barriers that personnel faced. Six suggested focus areas for action were identified, focusing on: cultural change; organisational communication; recruitment, selection and induction; leadership and management; policy and practice; and education and training.

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