

# Equality Diversity Inclusion

**Learner Report  
2022/23**



# Foreword

As the leading accountancy and professional services training and apprenticeship provider in the UK, we're proud of what we've achieved and have educated thousands of students over the last 85 years.

Based on our founding principles of education for all, our mission is deep rooted in providing equal access to education and opportunities for advancement to people of all backgrounds.

Yet we recognise that our students are not as diverse as they should be.

One of the challenges we face is that the Accountancy and Financial Services sectors in the UK have traditionally lacked diversity, particularly in senior roles and (whilst this is improving), this doesn't sit well with us.

Whilst we can't fix this on our own, we need to use our privileged position to challenge that.

We also realise that to reach their full potential, it's not enough to simply offer the same things to every student, not least as not everyone starts from the same place. Some of our learners come to us from more disadvantaged backgrounds: due to their homelife, their education, discrimination they've faced, or in some cases – all three.

It's possible that without intending to, we've sometimes mistaken their academic struggle for a lack of commitment. So we must think differently and appreciate students' differences, and start by understanding what needs must be met.

So we've put together teams of people from all over the business who have the passion and influence to make real change. Many of these people can see first hand the issues some learners face, and this gives us insight into what needs to change.

Over the last year, dedicated time and effort has been invested in collecting and analysing the EDI data of our wider learner population, something which isn't essential for them to provide when enrolling on a course. This data is an invaluable stepping stone to help ensure EDI is at the forefront of our thinking and help us work towards being even more inclusive; from the way we design courses and apprenticeship programmes to the way we teach and the support services we provide.

**Now is the time for us to work towards being better, and not rest on our laurels.**

**Kathy Walton**  
**CEO, Kaplan Financial**



# Introduction

Kaplan believes equality, diversity, and inclusion (EDI) – of culture, experiences, and perspectives - are paramount to creating success and opportunity in an ever-changing world.

We're committed to developing a learning community that is fully inclusive by recruiting, retaining and meeting the needs of all learners and candidates from across all sectors of society. Whilst our ultimate goal is to establish a diverse learner population who feel part of Kaplan and have every chance of succeeding, we recognise that this is a journey with many fundamental milestones to achieve along the way.

Our strategic objectives can be summarised under four areas:

- Establish strong foundations.
- Use insight to ensure that we're serving all sections of the community.
- Strive for equal outcomes and an inclusive learner experience.
- Working with clients to understand EDI priorities of their employees.

As a private education provider, collecting sensitive EDI data isn't a mandatory requirement for learners that are not government funded. As a result, we've only been able to get a true understanding of one of our learner segments, our apprentices, rather than all. That is, until now.

A big focus for this year has been to proactively engage with our fee paying learners and establish mechanisms to capture, store and analyse this sensitive information to help us determine a more complete baseline for our learners.

We could choose to keep this information internally, but as part of our commitment to strive for equal outcomes, we feel it is important to be open and transparent about our current position and ambition to close the gaps over the coming years. This is our first Learner EDI annual report and as such, has no historical data to compare against, but will do in the future.

It is with regret, that EDI data is unavailable from the Professional Bodies to compare our student population against. Instead, we have chosen to use the 2021 Census, Higher Education Statistics Agency (HESA) 21/22, and National Apprenticeship Starts 22/23 data to help us have multiple reference points to identify where we have opportunities to improve.

The information within this report will inform our priorities, goals and activities for 2023 and beyond.

# Summary of achievements

Working towards our strategic objectives, this part of the report provides a summary of the EDI learner activities and key achievements in 2022.

## 1 Establishing strong foundations

- Reviewed and updated our Learner EDI policy which is accessible on our website. We've also developed and documented a schedule and process for reviewing this policy to ensure that learners continue to be protected with us.
- Updates and improvements have been made to both our EDI and Accessibility website pages to help learners understand our approach and access the support they need.
- We now deliver inclusivity training to all managers and tutors in the company, and we have incorporated EDI learner training within our learning platform MyKaplan.
- Set up and monitor a new email inbox for learners to submit any queries they may have that relate to equality, diversity and inclusion either prior to or during their studies with Kaplan: [edi@kaplan.co.uk](mailto:edi@kaplan.co.uk)

## 2 Use insight to ensure that we're serving all sections of the community

- Developed a communication plan and new data capture mechanism to encourage fee paying learners to provide their EDI data. Although it only went live in March 2022, we successfully captured data for 24.4% of our total fee paying student population for the calendar year.
- Developed an approach to how we would bring together the data sets of fee payers and apprentices which have different methods of reporting to establish our baseline.
- Agreed our external comparative data sets to be Census 2021, Higher Education Statistics Agency (HESA) 21/22 and National Apprenticeship Starts 22/23.
- Established our 2022 baseline for Learner EDI – details published in this report.
- Conducted analysis into learner outcomes for fee paying ACCA and CIMA students based on EDI data, alongside our apprenticeship qualification achievement rates.
- Established our inaugural EDI Apprenticeship Advisory Group which met quarterly to gather insight directly from our apprentices.



# Summary of achievements (cont)

## 3 Striving for equal outcomes and an inclusive learner experience

- New EDI video and blog article outlining our commitment was launched along with email communications to encourage students to provide their sensitive information.
- Internal communications and FAQs developed and shared via our internal staff newsletter to ensure that all teams were able to deal with any questions.
- Removing a potential barrier for learning in period poverty by actively supporting learners with the provision of free sanitary products by discreetly asking for 'Penny' to those in need in all centres.
- Drafted, adopted, and published a linguistic EDI policy to enable the development of learning content that all users can relate to more easily. Implementation plan agreed, with all our content writers and editors, to incorporate it into all Kaplan generated learning materials in stages as they are updated, with a target completion date of the end of 2023.
- Designed a new template for our online OnDemand courses which is underpinned by accessibility.
- Worked with Ability Today to develop an accessible bookkeeping course for their members.
- Provided a lunch and learn session for staff on autism.
- Evening space provided at our London premises to improve accessibility to appropriate study space for our learners.
- Implementation of post exam results contact and support for all ACA and ACCA learners to elevate the inclusivity of our student support network, with plans to introduce this for our other qualifications.
- Blog articles and learner support published in 2022:
  - [Study Tips for Learners with ADHD and Dyslexia](#)
  - [How we're making a difference for our neurodiverse learners](#)
  - [Evolving landscapes: Women in business and education](#)
  - [Don't be afraid to ask for help](#)
  - [ACCA Oxford Brookes BSc: A great way to return to work](#)
- *Learn Better Podcast* episodes focused on learner support:
  - [Ep. 12: Finding your motivation, with The Motivational Dude, Ross Anderson.](#)
  - [Ep. 14: "Resilience" and the importance of self compassion, with mental health trainer Kirsty Lilley.](#)
  - [Ep. 17: How Food and Nutrition affects well-being, with nutritionist, Anjanette Fraser.](#)

# Summary of achievements (cont)

## 4 Working with clients

- Created resources to support and educate SME Client Line Managers where learners might need Additional Learning Support (ALS) in the workplace.
- Featuring expert speakers, delivered a series of small EDI round table client meetings, to collectively address EDI topics and learn from each others' areas of best practice. In 2022, the topics we focused on were:
  - Addressing social mobility through recruitment. Expert speakers - the CEO of Career Ready, Tokunbo Ajasa-Oluwa with nine client representatives.
  - Supporting neuro-diversity in apprentices and learners. Expert speakers - Chris Quickfall, CEO of Cognassist, which is a neurodiversity assessment platform, and Richmal Maybank from Autism UK, on supporting neuro-diverse learners at work, with 10 client representatives.



## 5 Collaborating with other companies

We are also focussed on helping people from underrepresented and diverse backgrounds get the career opportunities they deserve. So we've started work building relationships with organisations that share our concerns.

Organisations such as Career Ready, 10,000 Black Interns, RefuAid, and Rareqol have partnered with us to offer internship and mentoring programmes for those from disadvantaged backgrounds. In 2022, we provided internship and mentoring placements for 24 learners through these partnerships.



# Our learners: equality information

To establish a baseline of our learner population, we've analysed and reported data as separate segment groups for fee payers\*, apprentices, and as a combined total. As this is the first time we have produced this reporting, comparison data is limited to external sources.

## Methodology

Kaplan Fee Payers data was collected from those who had an active enrolment in the calendar year 2022 and filled in the optional EDI survey which went live in March of that year. This was completed by 24.4%\*\* of all fee payers within that period. The values from these learners have then been extrapolated to represent the entirety of the Kaplan Fee Payers learner population.

Kaplan apprentices data has been taken from the January 2023 data submission to the Department for Education. This represents 100% of the apprentices on the programme at that time.

The Kaplan Estimated Total is formed using the extrapolated fee paying data combined with the Kaplan apprentices data. All references to Kaplan learners will be using this value.

\* Fee Payers are defined as learners that pay for the course themselves or are funded by their employer. Apprentices are fully or part funded by the government.

\*\* Note that only 22.5% of fee payers answered the disability question.

## Comparison data

Due to the sensitive and protected nature of personal EDI data, it is difficult to gain a full understanding of the wider profile of individuals recruited and working in the professional services sector beyond age and gender – which makes it difficult for us to understand how representative our learner population is. Professional Institutes and clients are unable to share the statistics with us.

In order to assess equality amongst our learner population, we've selected a number of different external data sources to compare against. This includes, the wider UK population using the [2021 Census](#), [Higher Education Statistics Agency \(HESA\) 21/22](#), [National Apprenticeship Starts 22/23](#).



# Our learners: equality information (cont)

## Demographics

### a. Age

The highest proportion of Kaplan learners are aged 20-24 (34.1%). This profile is not unusual given that this would be the likely starting age of many of the learners who are completing professional training towards Level 7 apprenticeships.

Given the wider UK population in the Census skews towards the 40+ age group, it is understandable that Kaplan learners over-represent in the '20-24' and '25-29' age groups.

There are some noticeable differences between Kaplan fee payers and apprentices when learners are 30 and over, with fewer learning via an apprenticeship. With the apprenticeship start data 22/23 being grouped differently at 25+, it is difficult to assess whether the trend we see at Kaplan is also more widely reflected across England.

Figure 1. Kaplan learners by age

| Sample size | Data group             | 19 & under | 20-24 | 25-29 | 30-34 | 35-39 | 40+   |
|-------------|------------------------|------------|-------|-------|-------|-------|-------|
| 59,597,542  | Census 2021            | 23.1%      | 6.0%  | 6.6%  | 7.0%  | 6.7%  | 50.7% |
| 8,512       | Kaplan fee payers      | 2.0%       | 27.5% | 29.8% | 16.0% | 10.7% | 14.0% |
| 12,862      | Kaplan apprentices     | 8.6%       | 52.1% | 25.2% | 6.5%  | 3.7%  | 3.9%  |
| 47,820      | Kaplan estimated total | 3.8%       | 34.1% | 28.5% | 13.5% | 8.8%  | 11.3% |

| Sample size | Data group  | 20 & under | 21-24 | 25-29 | 30+   | Unknown |
|-------------|-------------|------------|-------|-------|-------|---------|
| 2,862,620   | HESA 2021/2 | 36.7%      | 27.8% | 13.0% | 22.6% | 0.004%  |

| Sample size | Data group       | Under 19 | 19-24 | 25+   |
|-------------|------------------|----------|-------|-------|
| 122,290     | App starts 22/23 | 31.5%    | 29.2% | 39.3% |



# Our learners: equality information (cont)

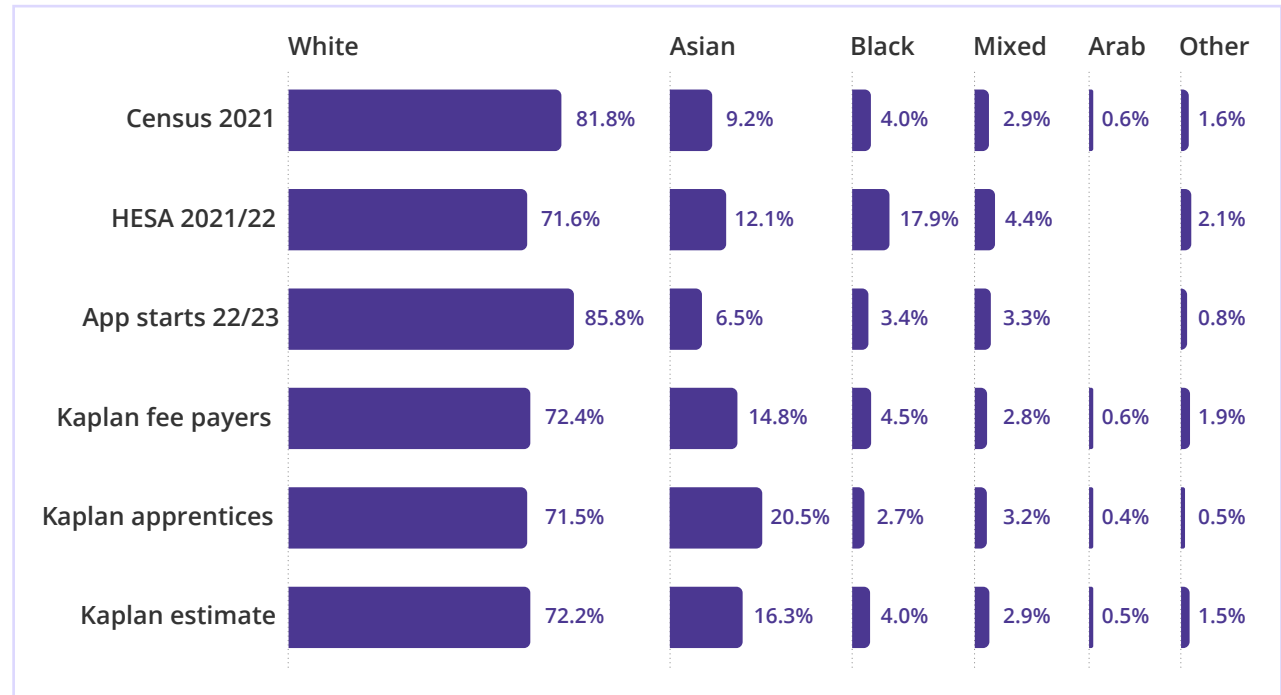
## b. Ethnicity

23.8% of Kaplan learners are from Black, Asian, and Minority Ethnic groups.

Whilst Kaplan under-represents the White population in comparison to the UK Census (72.2% vs 81.8%), it is more in line with the higher education figures published by HESA.

Kaplan has a higher representation of Asian learners (16.3%) than seen in all three external comparative data sets. However, Kaplan learners under-represent the black population when comparing to the HESA data set (4.0% vs 7.9%) and when comparing apprentices to the national average (2.7% vs 3.4%).

Figure 2. Kaplan learners by ethnicity



# Our learners: equality information (cont)

## c. Sex

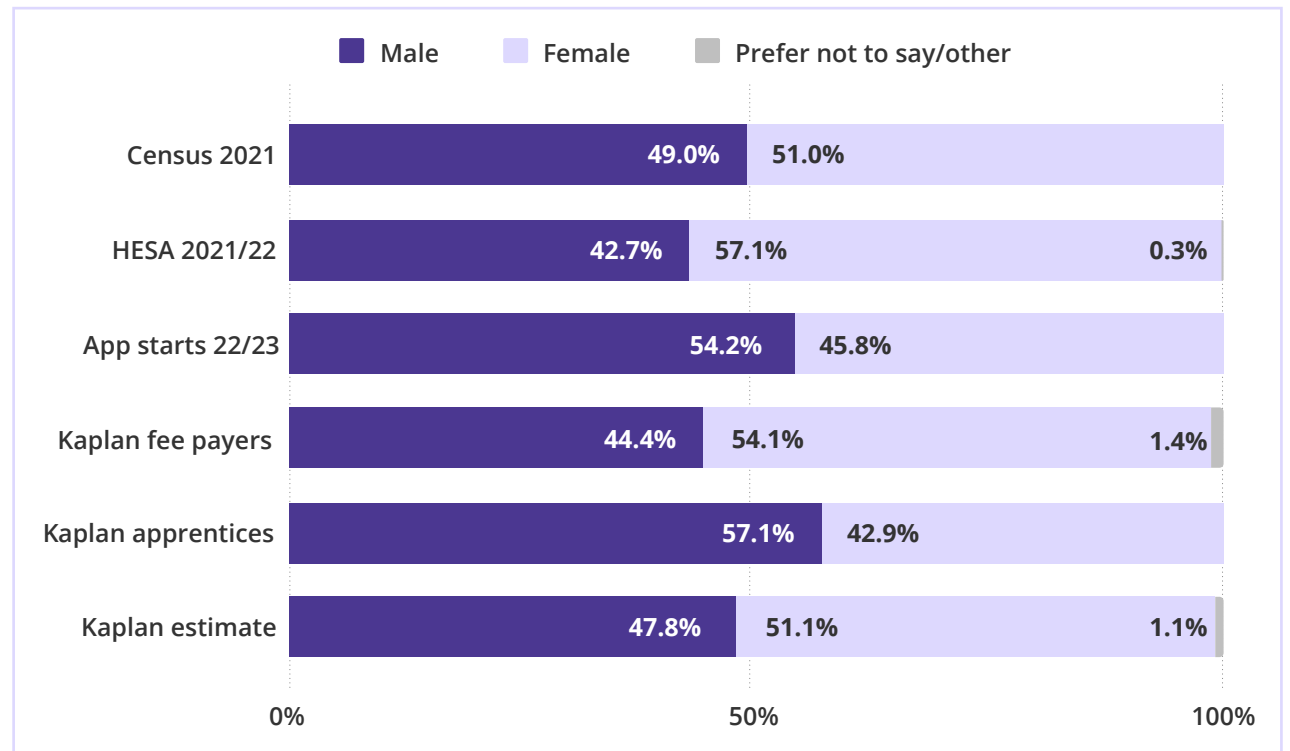
In 2022, 47.8% of Kaplan learners were male and 51.1% were female.

The proportion of male Kaplan learners is slightly lower than the UK male population reported in the 2021 Census (49% male, 51% female).

As a subset of Kaplan learners, there is a higher proportion of female fee paying learners (54.1% female / 44.4% male). This closely aligns with the female/male population reported by HESA (57.1% female / 42.7% male).

Kaplan apprentices are the reverse of this and over-represents the male population (57.1% male / 42.9% female), although this isn't too dissimilar from the 2022/23 national apprenticeship starts (54.2% male vs 45.8%).

Figure 3. Kaplan learners by sex



# Our learners: equality information (cont)

## d. Disability

4.0% of Kaplan learners have reported a disability, which is largely underrepresented when comparing to the 2021 Census (17.8%), HESA (15.8%), and National Apprenticeship starts (14.7%).

There is, however, a significant difference between Kaplan fee payers (2.8%) and Kaplan apprentices (7.5%). It is also worth noting that more Kaplan fee payers answered "Prefer not to say" (3.1%) than answered "Yes". Only 0.4% of Kaplan Apprentices answered "Prefer not to say", which may be due to disabilities needing to be declared as part of the apprenticeship application to access government funding.

Figure 4. Kaplan Learners by Disability

| Sample size | Data group             | Yes   | No    | Prefer not to say |
|-------------|------------------------|-------|-------|-------------------|
| 59,597,542  | Census 2021            | 17.8% | 82.2% |                   |
| 2,862,620   | HESA 2021/22           | 15.8% | 84.2% |                   |
| 122,290     | App starts 22/23       | 14.7% | 85.3% |                   |
| 7,864       | Kaplan fee payers      | 2.8%  | 94.1% | 3.1%              |
| 12,862      | Kaplan apprentices     | 7.5%  | 92.1% | 0.4%              |
| 47,820      | Kaplan estimated total | 4.0%  | 93.7% | 2.3%              |

# Key priorities and goals

Kaplan's mission is rooted in providing equal access to education and opportunities for advancement to people of all backgrounds. We're on our journey to achieve this, and have a keen focus on the following priorities over the coming months:

## **Inclusive student experience**

- Complete the implementation of changes to deliver learning content that all users can relate to, as part of our linguistic EDI policy.
- Continue to work with external experts in accessible learning content to find the best way of ensuring that our teams are equipped to recognise and eradicate the things that get in the way of accessibility in our content and courses.

## **Inclusive learner resources and delivery**

- We recognise the importance of inclusive learner resources and delivery methods. We will review and revise our educational materials, ensuring they are accessible and free from bias, and promote a diverse range of perspectives and experiences.
- Actively seek feedback from learners through a focus group, monitoring their experiences and preferences, and using this data to inform improvements in our resources and delivery methods.
- Train our staff involved in content production to ensure that the incorporation of universal design principles will be a priority, leading to materials and delivery formats that are accessible to individuals with disabilities and diverse learning styles.

## **Widening participation**

Scope out the development of a pilot B2C learner recruitment campaign to target under represented groups to attract more into the profession, studying with Kaplan.

## **Use insight to ensure that we're serving all sections of the community**

- Continue to collect and analyse data related to learner demographics, experiences, and outcomes to identify potential disparities and inform targeted actions.
- Build a deeper understanding of the diverse needs of our learners, identify areas for improvement, and develop evidence-based strategies that promote inclusivity and equitable outcomes.

## **Collaboration with clients**

- Actively seek to understand client concerns and align our efforts to address common areas of focus regarding equality, diversity, and inclusion through round table discussion events and regular health check meetings.
- Engage in open and transparent communication with clients, sharing best practices and collaborating on strategies to enhance inclusivity in our shared educational endeavours.
- Establish data-sharing agreements where appropriate and in compliance with relevant regulations, to exchange anonymised data that can provide insights into the learners' experiences and guide further improvements.