

Sarah M
viaFYI.org

30 March 2023

Dear Sarah M

OIA 22-23-25: DIVERSITY AND INCLUSION NZTE INVESTMENT TEAM

Thank you for your email of 13 February 2023 to New Zealand Trade and Enterprise (NZTE), making a request under the Official Information Act 1982 (the Act). On 13 March 2023, we extended the time for response to 27 March 2023. You requested the following information:

Please provide the following regarding the work completed by Mulberry St consultants for the NZTE Investment team which focused on culture, diversity, and inclusion:

- *A timeline detailing the key events of the report process, including, but not limited to, date of report completion, dates of reporting of findings to NZTE lead team and CEO, dates the NZTE Board received a copy of the report, date of reporting of findings to the Investment team, dates of reporting of findings to broader NZTE.*
- *A full copy of the report (individual names redacted as necessary)*
- *A copy of the summary of the report shared with the investment team.*
- *When was the NZTE Board made aware of the work?*
- *What action has the board taken in response to the report?*
- *What other specific actions have happened as a result of the report?*
- *How many women have left NZTE Investment since the report was completed (including those who left the investment team for roles in other teams in NZTE). What is this number as a percentage of women who were at NZTE Investment when the report was completed? Please provide this information separating international staff from domestic, and domestically, Auckland staff from other offices.*

Answers to your questions are as follows.

- 1. A timeline detailing the key events of the report process, including, but not limited to, date of report completion, dates of reporting of findings to NZTE lead team and CEO, dates the NZTE Board received a copy of the report, date of reporting of findings to the Investment team, dates of reporting of findings to broader NZTE.**

NZTE is committed to building a more diverse and inclusive workplace across all parts of our organisation. NZTE is aware that the investment industry has a demographic profile weighted towards men, and there was a responsibility to increase the diversity of our NZTE investment team and make the team a more inclusive place to work. In early 2022 the General Manager, Investment, commissioned Mulberry St to conduct a confidential piece of empathy research to listen to and further understand the perspective of the females in the team.

The timeline for the work was as follows.

18.05.2022 - Research Project announced to the Investment Team

16.06.2022 – Following a series of interviews with individuals in the Investment team, Mulberry St shared draft report with some members of NZTE Lead Team

21.06.2022 – Mulberry St shared the report with those interviewed and asked for permission to share with the wider investment team.

01.07.2022 – Mulberry St confirmed that a number of respondents felt they could be identified by the comments and were not comfortable with the report being shared due to confidentiality.

08.07.2022 - Mulberry St then provided an updated summary report based on interviewees feedback

21.07.2022 - Report themes shared via a summary report with the wider investment group.

2. A full copy of the report (individual names redacted as necessary)

The full copy of the report is withheld in full under the following sections of the Official Information Act:

- 9(2)(a): to protect the privacy of natural persons.
- 9(2)(ba) to protect information which is subject to an obligation of confidence where the making available of the information
 - i. (i) would be likely to prejudice the supply of similar information, or information from the same source, and it is in the public interest that such information should continue to be supplied.

3. A copy of the summary of the report shared with the investment team.

The copy of the summary report is withheld in full under the following section of the Official Information Act:

- 9(2)(ba) to protect information which is subject to an obligation of confidence where the making available of the information
 - (i) would be likely to prejudice the supply of similar information, or information from the same source, and it is in the public interest that such information should continue to be supplied.

4. When was the NZTE Board made aware of the work?

The findings were discussed with the Board at a high-level, and the General Manager, Investment shared the summary report with the Board Chair on 5 August.

5. What action has the board taken in response to the report?

The Board has a governance role. The findings of the report were relevant for management to action. The management have advised the Board of changes to the diversity of the Investment Leadership team in response to the report.

6. What other specific actions have happened as a result of the report?

A number of changes have been made as a direct result of the findings in the report. NZTE acknowledges changes and actions are ongoing and that the job is by no means completed.

Greater diversity has been achieved at the leadership level, and there is an ongoing focus on creating a more inclusive work environment and addressing some of the findings in the report.

Initial actions include:

1. All Investment Leadership team made aware of report findings. Workshop on findings and discussion on leadership approach was undertaken at Investment Leadership level to ensure awareness and ownership of the issues raised.
2. Communication from GM Investment to wider team acknowledging report findings and statement of intent for way forward.

3. Structural changes to the Investment Lead Team makeup, reducing the number roles reporting to the GM, Investment and in turn creating new leadership roles. These changes were made, in part, to create greater career pathways for female talent, and to give the GM, Investment more capacity to work on strategic matters, including the issues raised in this report.
4. Deliberate recruitment efforts designed to provide for greater gender diversity were implemented, for example ensuring gender diversity on short lists. NZTE has now achieved 45:55 gender representation at the Investment Lead Team level.
5. Developing more inclusive ways to undertake team activity.
6. A commitment to reinforcing performance and development practices, to ensure quality career conversations are held, including discussions around career pathways.

7. How many women have left NZTE Investment since the report was completed (including those who left the investment team for roles in other teams in NZTE). What is this number as a percentage of women who were at NZTE Investment when the report was completed? Please provide this information separating international staff from domestic, and domestically, Auckland staff from other offices.

	Total (at 30 June 2022)	Men (at 30 June 2022)	Wome n (at 30 June 2022)	Undisclosed (at 30 June 2022)	# of wome n that have left since survey	# of men that have left since survey	# un- disclose d that have left since 1 July 2022
Total	58	29	25	4	8	12	1
International	11	6	5	0	1	5	0
NZ – Auckland	42	20	18	4	7	7	1
NZ - Other	5	3	3	0	0	0	0

Note: on 16 March 2023 you requested additional information on question 7 as follows:

- regarding the number of females departed since the report, please include in that figure women currently serving their notice period, and provide the information as at the most current date possible (March rather than February)

- regarding direct reports to the GM of Investment. Please provide the figures excluding fixed term contract positions where a woman has replaced another woman who is on parental leave (i.e. this should only count as one female direct report, not two).

The information in the table above includes data as at 21 March, incorporating the information requested on 16 March. Incorporating this additional information request rather than viewing it as a new OIA request has led to a slight delay in our response to you.

What has the gender mix of direct reports to the GM Investment been over the last 5 years?

	Women	Men	Undisclosed	Total
Current	4	4	0	8

June 2022	3	7	1	11
June 2021	5	7	0	12
June 2020	4	6	0	10
June 2019	3	7	0	10

You have the right under section 28(3) of the Act to seek an investigation and review by the Ombudsman. Information about how to make a complaint is available at: www.ombudsman.parliament.govt.nz or freephone: 0800 802 602.

Yours sincerely



Melissa Trochon
Director – Board & Ministerial