

CFA Society Netherlands fosters an inclusive culture for a knowledgeable community

To become fully inclusive, most organizations need to transform their culture. As a starting point, this requires broadening the narrative to diversity of thinking and inclusion, to create shared purpose and meaning.

CFA Society Netherlands is celebrating its 5-year anniversary this year. We are happy with all our achievements since then as a stable, trusted, and proactive investment community. The society's aim is to continue advancing the investment profession, sharing knowledge, and enabling members to serve their clients most effectively. To fulfil these ambitions, we strive to be an inclusive society, which can lead us to becoming even more innovative, knowledgeable, and welcoming. We can do the most good for the investment profession and wider community when our members feel valued and inspired to be a part of our society.

Why is inclusion important to us?

On January 1, 2023 it is five years ago that CFA Society Netherlands and VBA beleggingsprofessionals merged into CFA Society VBA Netherlands, as of now CFA Society Netherlands. The aim of this merger was to be an inclusive society for all investment professionals in the Netherlands. As we are celebrating this 5-year anniversary it is also a good moment to reflect on what we have accomplished in this space and what extra steps we can take to become even more welcoming to all investment professionals who are already a member of our society or would like to become one. To do so, we need to first get a better understanding of the current state of perceived inclusion amongst our members.

Note

1 Deloitte Global Human Capital Trends 2023

What does inclusion mean to us based on Deloitte's research¹?

Inclusion: The actions taken to understand, embrace, and leverage the unique strengths and facets of identity for all individuals so that all feel welcomed, valued, and supported

In an **inclusive society** everyone:

- Is treated fairly and respectfully
- Has equal access to opportunities and resources
- Has a sense of belonging
- Feels valued and welcome for their perspectives

In an inclusive culture people feel empowered, safe, valued, and respected. Society members feel free to contribute, share knowledge and experiences, and attend our events or participate in activities without any concern, or fear of judgement. Essentially, it boils down to all members feeling that they belong and are appreciated for what they bring to our society. Given the merge of our two member bases and their increasingly diverse backgrounds (e.g., in terms of age, country of origin, experience, job roles), we find it very important to prioritize inclusion. We would like to examine the current level of perceived inclusion within our society to determine where we stand today and what we can still improve on in the future. That way, members can feel as encouraged and inspired by each other and our purpose as possible.



How will we get a better understanding of our inclusion?

We would like to hear from all our esteemed members! All members have received an invite to take a short survey on their perception of the levels of inclusion in our society. This way, they can let us know how they feel we are doing when it comes to inclusion. We can only continue to progress with these valuable insights.

This survey was developed through a collaboration with Deloitte. The aggregated data will give us the opportunity to benchmark where we stand, so that we can explore ways to progress even further. The gathered insights will help us define focus areas for improvement. We look forward to sharing outcomes and next steps with you later this year.

Are you one of our members who has not already participated in the survey? You still have time to do so! The survey will stay open until the end of June. Fostering an inclusive culture is an ongoing journey and we can only make further progress with your valuable insights, so please contribute and have your voice heard!

If you have questions or suggestion please feel free to share them, we are always here to listen and discuss.