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For too long, conversations about disabled people have been hamstrung by fear – fear of causing offence, of being politically incorrect or of being misunderstood. Purple's mission is to make disability a commercial issue, and by doing so add value to businesses and the lives of disabled people. Our goal is to be the catalyst for change in creating a world where disability presents no barrier for individuals or business.

We are doing this by supporting thousands of businesses in becoming Disability Confident, understanding the needs of disabled consumers and through training and audits to enable businesses to flourish.

wearepurple.org.uk

Thank you to the following individuals for their contribution: Gill Ackers, Mike Adams, Jenny Baskerville, Karren Brady, Dr Caroline Casey, Tony Cates, Jonathan Channing, Nikki Curtis, Tim Fallowfield, David Gracie, Baroness Grey-Thompson DBE DL, Dowshan Humzah, Faye Lawson, Dianne Lightfoot, Anicia Mui, Charlene Overend, Jatin Patel, Mark Russell, Sir Philip Rutnam, Justin Tomlinson MP, and Nicholas Winsor.





Welcome from Tony Cates

As the Board level representative for Disability and Mental Health at KPMG I have been championing this agenda for a number of years. For me, it's always been the right thing to do and, with my own experience of single-sided hearing loss, I have always recognised the value of creating accessible environments.

I am pleased that KPMG has once again been able to work with Purple to produce a follow-up review to the Leading from the front – Disability and the role of the Board report published last year. This report outlined the full extent of the business opportunity that disability inclusion presents. With 1 in 5 people in the UK living with a disability or long term condition, and the estimated value to the UK economy of the 'Purple Pound' being £249 billion, there is a strong business case for being disability inclusive from both a talent and consumer perspective.

Everyone has their own story or perspective on how disability and mental health issues are present in their lives. It should not be incumbent on any one person, organisation or government to provide all of the answers. However, the business community, through collaboration, sharing of best practice, and confidently talking about disability inclusion, has a vital role to play in advancing systemic change.

KPMG's 'Fairer Futures' campaign puts Inclusion, Diversity and Social Equality at the heart of our ambition to becoming a magnet for talent and ensures broader inclusion is a board and firm-wide leadership issue. On this, we are making headway. Since 2014 we have published data related to the number of colleagues with a disability at KPMG. In 2018, this stood at 6.4%. Last year, we set new public diversity targets through to 2022.

Additionally, we continue to enhance our wide-ranging provision for our colleagues on mental health, including e-learning modules, and our partnership with Auticon has helped deliver value through bringing greater neuro-diverse thinking to our technology capability.

There is still a long way for all of us to go. I hope our continued work on Leading from the front provides a good springboard from which to start or continue your own disability inclusion journey and join us to work towards fairer futures for all.



Tony CatesPartner, Vice Chairman
KPMG in the UK

In the UK...





13.9 million

people with a disability or long term condition

F249 hillion

the spending power of disabled people and their families



overall percentage of university entrants with a disability or long term condition



7.6 million

people of working age (16-64) with a disability or long term condition



3.9 million

people of working age with a disability or long term condition are in employment

Globally...



people with a disability or long term condition



\$8 trillion

the spending power of disabled people and their families

¹Scope – disability facts and figures https://www.scope.org.uk/media/disability-facts-figures/

² DWP, December 2016 https://www.gov.uk/government/news/business-champions-recruited-to-lead-a-war-on-inaccessibility

³ UK parliament, 17 May 2019 https://researchbriefings.parliament.uk/ResearchBriefing/Summary/CBP-7540

⁴UK parliament, 17 May 2019 https://researchbriefings.parliament.uk/ResearchBriefing/Summary/CBP-7540

⁶The Guardian, 17 January 2019 https://www.theguardian.com/education/2019/jan/17/universities-can-do-more-to-support-their-disabled-students

⁶ Return on Disability May 2016 http://www.rod-group.com/sites/default/files/2016%20Annual%20Report%20-%20The%20Global%20 Economics%20of%20Disability.pdf

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Reflections, one year on

Since the launch of Leading from the front – Disability and the role of the Board, the conversation around disability has been changing for the better. In the introduction to last year's report we referred to this change as "little by little"; more than a year on, the conversation has started to move the dial.

Both KPMG and Purple are proud to be working with a wide range of businesses, disability groups, politicians and wider stakeholders who share our belief that creating a more inclusive society is not only the right thing to do, but a commercial imperative.

This short review does not replace what we produced last year. Instead, it reflects on the progress made, identifies key learnings and continues the conversation. It is designed to inform, guide and share best practice to improve the confidence, knowledge and leadership on disability inclusion – to recognise the value both to business and wider society.

As senior leaders responsible for setting the strategy and changing organisational cultures, this review provides a focus on improvements made by UK companies, providing you with the tools to guide, measure and benchmark your organisation's disability inclusion journey.

Every organisation will have its own unique challenges and there is no silver bullet. We hope this review provokes further discussion and – above all – inspires action at the board and senior leadership level.

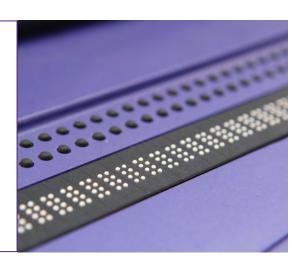
Our co-authors of the 2018 report, Mike Adams and David Gracie, outline on the following pages their own observations on the changing landscape in this area over the last year.



Mike Adams, CEO of Purple says:



On a recent tour of my daughter's new secondary school, I was struck by their motto: 'Learning today, leading tomorrow.' This could be aptly applied to boards across Britain as they take forward disability inclusion and drive cultural change across their businesses for the benefit of disabled people and also their business.



Driving change

As CEO of Purple I am in the privileged position of meeting many board members and senior management teams around the world to talk about disability. I have witnessed a steadfast consensus that - to affect change - three target audiences within an organisation are key.

The board sets the tone, tempo and, crucially, the priorities. The examples in this review demonstrate what can be achieved with strong leadership at little cost.

Line managers also need to feel confident in managing their disabled staff, including staff who have not yet disclosed a disability, and frontline colleagues play a key role by providing a gateway for disabled customers to engage with the business.

Transforming the customer experience

Since last year's launch we have witnessed significant change, and change with real impact. We have seen the representation of disabled people within media and advertising increase, from the winner of Britain's Got Talent in 2018, Lost Voice Guy, to the new Disability Collection from Getty Images, which we have used an example of in this review. Purple Tuesday, created and run by Purple, is a call to action to organisations serving the public to improve the customer experience for disabled people. Last year board members, as well as managers and frontline colleagues, ensured over 750 retail organisations made more than 1,500 commitments to improve the customer experience for disabled people.

These were not token gestures – these commitments have generated tangible long-term improvements for disabled customers. From training security staff in dementia awareness, frontline staff learning "Hello" and "Goodbye" in British Sign Language, right through to audits of physical access and all digital devices, the outcomes have changed the lives of disabled people across the UK for the better.

It has also provided benefits for business. The 750 participants were given practical support free-of-charge to improve how their business can access the £249 billion disability market - the Purple Pound.

This November, Purple Tuesday will be a broader call to action for all sectors, not just retail. And it will be celebrated around the world – it's now an international initiative that will help businesses and organisations develop targeted plans to access the disability market, improving the customer experience for disabled customers in the process. Boards around the world will be taking a lead from the front.

Commerciality and disability inclusion

It may seem to business leaders that the issue of disability inclusion has become like London buses; that nothing has seemingly been mentioned for years and now all of a sudden action comes all at once. A word of advice for boards: disabled people would much prefer a choice of buses than none at all.

Over the coming months we must reach a tipping point where businesses see skilled disabled people as a major asset – an intrinsic part of what they do. To borrow a phrase from a leading disability leader, businesses now need to show up and not just turn up. Boards need to see disability as an investment rather than a cost, to decide how they finance this investment without relying solely on limited equality and diversity budgets.

The businesses leading from the front offer shining examples of the huge opportunities and tangible benefits for all which spring from blending disability inclusion and kindness with commerciality. Given the size and scale of the disability market, board members would do well to adopt my daughter's school's motto.

David Gracie, Director, Legal Services, KPMG commented:



We have also seen investors taking a more integrated approach to Environmental, Social and Governance (ESG) matters when making investment decisions. This has been driven by pressure from their trustees, clients and other stakeholders who would like to invest in companies that perform well on ESG issues. Substantial investments are being made by institutions in their integrated ESG capability, with the era of having separate ESG teams coming to an end."

Following last year's report, we undertook a roadshow around the UK speaking with many businesses about our findings and discussing some of the best practices we had identified when conducting our research. It is clear that companies are keen to accelerate their progress and that developments in the past year are designed to help companies with this issue. It was also inspiring to hear from a number of individuals who came forward to tell us their personal stories on how disability has affected them in the workplace and that this report had given them greater confidence to encourage changes in their own companies.

Corporate governance

Since the report was published last year, we have seen developments in the area of corporate governance with the publication of the new FRC Corporate Governance Code, and the release of the Wates Corporate Governance Principles for large private companies. In both cases there has been an increased focus on the area of diversity to support effective



decision-making in the boardroom, and to encourage companies to consider their full range of stakeholders, including investors, customers, suppliers and their local communities. Whilst the area of diversity and inclusion continues to be dominated by gender and ethnicity in boardroom discussions, we have seen this expand to capture other aspects such as age, cognitive diversity, LGBT, socio-economic background and, of course, disability.

In addition to the introduction of these new Codes, companies are also now required to explain how they comply with the requirements of section 172 of the Companies Act 2006 to have regard to a range of stakeholders and the long-term consequences of their decisions. When taken with the Corporate Governance Code requirements relating to employees, and how the employee voice is represented and considered in the boardroom, we have heard about many initiatives that look to capture the views of employees, such as forums to support the needs of disabled workers.

Investor landscape

We have also seen investors taking a more integrated approach to Environmental, Social and Governance (ESG) matters when making investment decisions. This has been driven by pressure from their trustees, clients and other stakeholders who would like to invest in companies that perform well on ESG issues. Substantial investments are being made by institutions in their integrated ESG capability, with the era of having separate ESG teams coming to an end.

In summary, boards that consider disability when taking decisions tend to perform better commercially, and are more engaged with their employees and other stakeholders. The business environment in which we operate these days is also more conducive to supporting companies that are looking to improve in this area so the time for action is now.

Taking action

In 2019 disability has gained global coverage at the most senior levels of business. Dr Caroline Casey, with the support of a group of CEO's from some of the biggest brands across the globe, brought disability inclusion to the main stage at the World Economic Forum (WEF) in Davos. The campaign is looking for 500 global leaders to commit to joining the Valuable 500 by the time the WEF takes place in Davos in 2020. The Valuable 500 currently has 97 signatories and a further 220 sign-up conversations happening across the globe. 45 of those companies currently signed up are UK-based⁸. For the 1.3 billion people worldwide with a disability – 15% of the total population – this represents a strong commitment to accessibility and inclusion from the very top of the business world. It also builds on the 2030 Agenda for Sustainable Development, where the Sustainable Development Goals included specific references to people with disabilities.

In the UK, according to government data, 7.6 million people of working age (16-64) reported that they had a disability in January-March 20199; 18% of the working age population. Of these, an estimated 3.9 million were in employment, an increase of 150,000 from the previous year's data. Whilst the disability employment gap still stands at nearly 30%, there have been some tailwinds here, with the Department for Work and Pensions (DWP) Disability Confident scheme continuing to grow. The scheme, approaching its third anniversary, now has over 12,50010 sign-ups from across UK Plc with 61 (17.4%) companies from the FTSE 350 represented. This could be an organisation's first step into disability inclusion at level 1, to those at a more advanced stage of their journey as a level 3 leader. Alongside the Valuable 500, there is now provision for organisations to access a cost free framework to showcase their commitment to disability inclusion.



The [Disability Confident] scheme, approaching its third anniversary, now has over 12,500¹⁰ sign-ups from across UK Plc with 61 (17.4%) companies from the FTSE 350 represented."

Your stakeholders

In our 2018 report we focused on three main stakeholders: your customers; your people; and your investors.

Your customers

In September 2018 new regulations on the accessibility of websites and mobile applications of public sector bodies came into force in the UK. These regulations implemented the EU directive on web accessibility. This represented a step towards ensuring disabled customers are not excluded from products and services due to inaccessible apps and websites, especially as trends continue to move towards the consumption of these through mobile devices, as highlighted in the KPMG report 'Testing insights - doing the right thing' in June 2019. Brands that welcome disabled customers by providing the assistance and facilities they need, and that emphasise inclusivity in their design, branding and advertising, can win new, loyal customers.

Your people

We have seen increased interest in the area of reporting on the diversity of employees, inclusive of those with a disability or long term condition. In November 2018 the government produced a first of its kind framework for voluntary reporting on disability, mental health and wellbeing. The Foreign and Commonwealth office (FCO) were the first Civil Service department to publish a report in line with the framework in June 2019, with the disability charity Scope publishing a guide to reporting on disability employment aimed at helping businesses in the same month. In March 2019 global law firm Clifford Chance went beyond this framework including disability within their pay gap report alongside gender, ethnicity and sexuality. Using the Peter Drucker mantra 'what gets measured gets managed', it is important to recognise this is still a developing area. However, it is again evidence that there is now a wider resource of guidance, support and best practice to learn from.

⁸ Data from Valuable 500 as at 28 August 2019

⁹ UK parliament, 17 May 2019 https://researchbriefings.parliament.uk/ResearchBriefing/Summary/CBP-7540

¹⁰ Data from DWP as at 13 August 2019



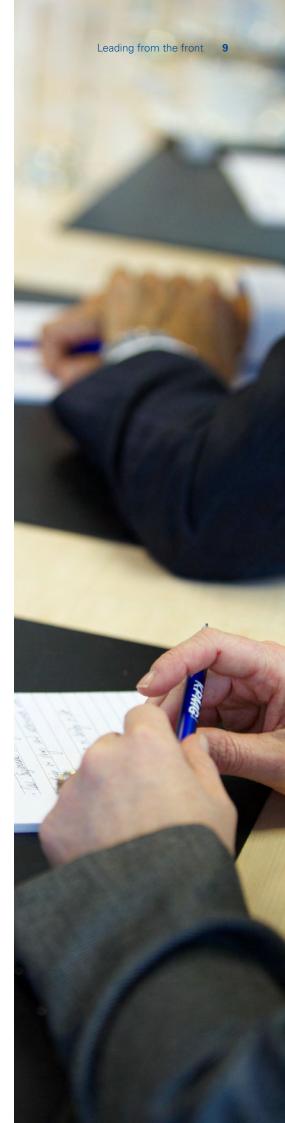
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Your investors

As mentioned previously, the recent changes in corporate governance and increased focus on ESG could provide a useful platform to promote your disability inclusion activities to your wider stakeholders. Generational expectations of millennials towards environmentally and socially responsible investments are growing, presenting an opportunity in which the promotion of your disability inclusion activities with your customers and people aligned to corporate purpose could provide a powerful narrative for investors.

In summary, the conversation around disability is changing. Forward-thinking leaders and organisations are seeing the sustainable investment opportunity rather than the perception of short term costs. With a balanced approach aligned to your corporate purpose and values, disability does not need to be a topic to be scared of. Our five recommendations from the 2018 report remain relevant and can help you to continue or start your disability inclusion journey by:

- Tabling disability as an agenda item for a minimum of one board meeting each year.
- Appointing a board-level champion who is accountable for disability issues within your organisation.
- Signing up to the Government's Disability
 Confident scheme (and more recently the
 Valuable 500) to demonstrate your commitment
 to becoming an inclusive employer and brand.
- Becoming an advocate and promoting disability issues to your suppliers, extended networks and external audiences.
- Considering external partnerships with campaigns and bodies that specialise in disability issues to boost your understanding and accelerate your change programmes.



How to be Disability Inclusive Leaders

These five themes will help you TEACH your board, both as collective leaders and on behalf of your organisation, how developing a strategy on disability inclusion can help improve inclusive leadership.



Trust

Developing trust with a community that makes up 20% of the UK population is responsible from both a social and commercial perspective.

- As leaders, your aim is to be trusted by a wide range of stakeholders: from employees, to your fellow senior leaders and board, to investors and the wider public.
- For your organisation, internal trust creates an environment where employees feel that they belong and externally it demonstrates that you are a good corporate citizen.



Emotional Intelligence

Valuing and investing in greater emotional intelligence will benefit people with disabilities and long term conditions from both the employee and customer perspective.

- This might have previously been undervalued, however, the ability to connect with others emotionally and being able to demonstrate empathy and show a more authentic side to your character is something millennials and Gen Z demographies, in particular, are looking for in leaders.
- For your organisation, being able to connect the purpose and values of your operations to your employees, customers and communities will improve engagement with all of your stakeholders.



Awareness

Awareness and knowledge of the breadth of disability and long term conditions is desired, rather than expertise.

- As leaders, you are not going to be expected to be an expert on every topic and disability is no different. However, with one in five people in the UK living with a disability or long term condition, increased awareness will build role models, allies and ultimately greater inclusion.
- For your organisation, greater awareness will improve understanding and help colleagues improve policies, processes and procedures for employees and customers.





Considered

Developing the principles of inclusive design consistently across all of your strategic thinking will open up your business to all.

- As leaders, thinking strategically through the prism of accessibility and inclusion will help you seek different perspectives and understand how people with a disability or long term condition may be excluded.
- For your organisation, consideration of disability inclusion within strategy and product design will lead to greater innovation and creative solutions.



Held Responsible

Ultimately, a level of accountability needs to be built in to ensure that what you are managing is measurable.

- As leaders, having accountability for championing disability inclusion will provide you with new opportunities to learn and develop and improve your own personal brand. It will provide you with a platform to challenge the status quo and improve the performance of your own organisation around disability inclusion.
- For your organisation, improved accountability on disability will improve representation across your employee, customer and wider stakeholder base.

We would recommend that the board set a clear 100 day plan, incorporating our previous recommendations and these five themes. This will provide early wins and help set you up for success as you develop your long-term strategy, aligned to your organisational purpose, values and local communities.



Leadership perspectives

There was a time in the business world that if we talked about disability, the conversation would revolve around an accessible bathroom and a ramp, regardless of the impairment of the individual involved. We are lucky that the business world has moved on from this and recognition of impairment, both visible and invisible, is part of the debate. We now accept that physical access for all people should be a given and that there are still many challenges for disabled people in that hate crime is on the rise.

> No longer can disability be something that is forgotten or tagged on to the end of a separate discussion around ED&I. However, the next stage of business development is to interrogate at a senior level what we are all doing to ensure that progression is part of that discussion as well and this is something that I am really excited about."

Baroness Grey-Thompson DBE DL



Businesses that aren't inclusive are missing a chance to tap into the skills and expertise of the 7.6 million working age disabled people in the UK. In order to create lasting cultural change for disabled people in the workplace it is vital that support is embedded at all levels of an organisation. KPMG is leading the way by driving change from the board down.

With their forward-thinking, our Disability Confident Leaders are working together and inspiring other businesses to benefit from building more inclusive workforces."

Justin Tomlinson MP

Minister for Disabled People



We recruited two autistic board apprentices in 2018 and will shortly be seeking applicants for the next cohort. We have been very impressed with the new insights and fresh thinking we've been able to access thanks to this initiative and are proud to be supporting more autistic people to join charity and corporate boards."

Gill Ackers

Chair of Autistica



As Board Sponsor for Disability at Sainsbury's and Chair of the Disability Confident Business Leaders Group, my view is that the real difference business leaders can make when it comes to inclusion, is committing to demonstrable improvements in colleagues' lives. I'm a big advocate of driving the inclusion of people with disabilities from the very top

The real difference that leadership makes when it comes to inclusion is championing a truly inclusive workforce. At Sainsbury's, we want to be the most inclusive retailer, where every single one of our colleagues can fulfil their potential and where all of our customers feel welcome when they shop with us, as evidenced by a number of initiatives in the past year alone. Through simple adjustments and the encouragement of open conversations in the workplace, our aim is to help colleagues across the Sainsbury's Group be the best they can be."

Tim Fallowfield

Company Secretary & Corporate Services Director, Sainsbury's and Chairman, Disability Confident Business Leaders Group





When we think of autism or more broadly of NeuroDiversity we think of a different way of thinking and processing information. There are many arguments for and against autism being labelled as a disability. Autism is included and protected as a disability under the equality act. Autism is often disabling for individuals because of societal norms which work for the many and disenfranchise the few. Companies must be aware of hidden disabilities but furthermore companies must be conscious of work environments that have the potential to become disabling for their NeuroDiverse workforce."

Jonathan Channing

Founder of Develop Autism



Equality, diversity and inclusion are at the heart of everything we do at West Ham United, from the Board's agenda, flowing through all facets of the club. This is a Club where having a conscious focus on equality has resulted in an environment in which everyone can feel respected and valued. We are proud that the Club is driving progress beyond London Stadium and out into east London as a result.

London Stadium was built on a foundation of diversity since its inception at the Olympics in 2012. Providing a fantastic match day experience for all West Ham United fans is something we pride ourselves on – it is an inclusive and diverse environment where everyone is treated equally. Whether you need to make use of services like our prayer room, complimentary, supporter 18 fleet strong shuttle bus service on match days, which is getting bigger and better, our 20 Disabled Supporter Assistants around the stadium, new audio commentary devices with wider range of collection points, or the installation of RADAR lock system across all 49 accessible toilets and three changing place facilities throughout the stadium. Additionally, with 55 accessible parking spaces out of a total of 229 at the Stadium (24%), London Stadium is far in excess of the recommended six per cent target for recreational venues and events and with 252 WAV spaces and 773 Easy Access and Amenity seats across our four stands, there are accessible areas for our supporters in all parts of the ground.

Since our move we've invested more than £13m into Newham and the surrounding Olympic boroughs, which has allowed us to work hand-in-hand with local charities, more recently through the Players' Project - the most ambitious and integrated community programme ever created by a Premier League Club. Our globally iconic players are taking the time to address key issues within our local community, and this makes a real difference in a number of areas, from poverty through to accessibility.

This progress is something I'm hugely proud of and we are thrilled that our initiatives have been recognised externally. We will keep working with our fans and the community to continually be at the forefront of work on these important issues."

Karren Brady

Vice Chair, West Ham United



Business has so much power to change the world and make it a better place for disabled people. We set up our President's Group, led by our President, Sir Ian Cheshire, to work with business leaders to harness that power for good to change the world.

So how can senior leaders use your influence to lead the way and to shift the dial on employment and consumer opportunities for disabled people?

One aspect of true leadership is authenticity and we can all do more to be our authentic selves at work including talking openly about disability.

We know that – whether we like it or not – a small action by a senior leader can have a disproportionately large impact and a senior leader who talks about being disabled or about how disability affects them can set the tone for the whole business and give permission for others to do the same.

That changes the whole conversation around disability to being about "us" not "them"; and that's a conversation that we all need to have to recruit and retain the best talent for every business."

Diane Lightfoot

CEO, Business Disability Forum



As Civil Service Disability Champion I have set out and published a clear vision for a disability inclusive Civil Service in which disabled colleagues are recognised for the many talents that they bring to the organisation.

Senior leaders have a key role to play in achieving this culture shift by actively role modelling 'inclusive leadership' in which difference of thought and perspective is actively sought and valued.

In relation to disability inclusion this can easily be demonstrated by ensuring organisational systems and working practices are fully accessible and that disabled colleagues have the adjustments they need to be the best that they can be.

As Senior Leaders we need to lead the way on inclusion and simple actions such as mentoring or sponsoring talented people with disabilities can send out powerful signals about your own personal commitment to being an inclusive leader and the direction in which you are wanting to drive your organisation. In other words, giving permission and empowering others through role modelling the very behaviours that you wish to see as the norm."

Sir Philip Rutnam

Civil Service Disability Champion, Permanent Secretary, Home Office



Business has the power to change this if they recognise and invest in the value of this enormous market. Businesses have vast human and financial capital, international footprints, market power and the financial motivation to solve some of the largest issues in the world. As we have seen throughout history, when business leads society follows, and I truly believe business has the power to create the tipping point in real inclusion globally. There is a commercial, as well as a social, imperative to do so: including friends and family of those with a disability, disabled consumers present an untapped market worth £8 trillion, nationally OECD countries are recording up a loss of 7% of GDP due to disability exclusion. Both these are figures no business can afford to ignore.

I'm delighted that since launching The Valuable 500 this year around 100 business leaders have recognised this missed potential, and have signed up to putting disability inclusion on their board agendas. The Valuable 500 is elevating the disability conversation to the leadership agenda and is broadening the work on Diversity & Inclusion to ensure everyone is included. We now need all business leaders to do the same, and recognise the value of disabled people."

Dr Caroline Casey

Founder, The Valuable 500



Representation shapes policy in government and equally so for all organisations. This is not just a case of social equality but of quality and a commercial imperative to better cater for the needs of the disabled customer or stakeholder. The collective spending power of disabled people is estimated to be worth about £249bn to the UK economy. Businesses and organisations need to be more inclusive and improve the customer experience for all of our population in order to better take advantage of this market opportunity as well. If brands are seeking to extend their footprint and make improvements for all – they best take a closer look at how they are serving all types of disabled customers – many of whom are under-represented and under-estimated."

Dowshan Humzah

Director and Chair of UK Advisory Board, Board Apprentice Global



The Board Apprentice scheme has worked very well for Autism Jersey. Our first apprentice, Jonathan Channing, visibly grew in confidence during his time with the board. He also offered some unique insights to board meetings when invited to do so. Now that his apprenticeship has ended, Jonathan has started an Advisory Council, to represent the view of autistic people in the island and provide specialist input to the work of Autism Jersey. We are also searching for a new apprentice to follow in Jonathan's footsteps."

Nicholas Winsor

Chair of Autism Jersey



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