



Ireland's Women in Finance Charter Annual Reporting Template 2024

Welcome to the 2024 Annual Reporting Template for Ireland's Women in Finance Charter. Thank you for agreeing to provide this data on behalf of your firm.

The Annual Reporting Template is only for firms who are signatories to Ireland's Women in Finance Charter and who have completed their Baseline Template in 2023. Please ensure that these steps have been completed before proceeding. Further information and guidance on the commitments of the Charter is available at:

<https://www.betterbalance.ie/partners/>

In the following Annual Reporting Template, you will be asked to complete a short series of questions related to the gender balance in your place of work, as well as any representation targets undertaken by your firm in the last calendar year. You can partially complete the survey, save your progress, and return later.

The information you will be asked to provide will be at the firm level, therefore individuals within your firm will **not be identifiable**. Data gathered by this template is confidential and will be reported in an **anonymised** way only. While the survey is underway, the data is stored securely and in compliance with GDPR on the LimeSurvey servers and can only be accessed by the ESRI study team with two factor authentication. When the survey wave is completed, the data will be stored securely by the ESRI in an anonymised format and in compliance with GDPR. In parallel, under the Charter, firms commit to making information on progress towards targets publicly available.

If you have any questions related to the Annual Reporting Template or the use of this data, please contact the ESRI research team at womeninfinance@esri.ie.

Please, click 'Next' to proceed to the template.

Industry Partners



Data Partner



Section 1: Firm Profile

Q1. Last year, you filled the following information on behalf of yourself and the firm you represent.

If the information has changed, please note the new information in the text box provided. If the information has not changed, please move to the next question.

Firm Name	
Name of Person Entering the Data	
Your Position within the Firm	
Your Email Address	
Your Phone Number	
Name of Alternative Contact Person	
Email Address of Alternative Contact Person	
Phone Number of Alternative Contact Person	

Q2. Please confirm that the data you are providing reflects the situation at your firm for the calendar year of 1st of January 2024.

- Yes (go to Q3)
 No (go to Q2a)

Q2a. If the data you are providing does not reflect the period of 1st of January 2024, please state the period to which your data pertains:

Section 2: Key Metrics

Q3. Please report the number of employees within your firm in the Republic of Ireland as of the 1st of January 2024.

Note: Please provide these figures as a total headcount, not as full-time equivalent. Board members who are not employees should not be included here. If there are no employees in any category, please fill '0'.

	Female	Male	Total
Full-Time			
Part-Time			

Q4. Please report the number of male and female employees in the following positions within your firm in the Republic of Ireland as of 1st of January 2024. Please provide these figures as a total headcount, not by number in full-time employment.

Please report the number of employees in the following positions within your firm in the Republic of Ireland as of the 1st of January 2024. Please use the same employees' categories as in your baseline and provide these figures as a total headcount, not by full-time equivalent. Note: If some of these positions do not apply to your firm, please record '0' in the corresponding cell. If the Board and the Executive Committee are the same within your firm, just complete one of these two rows and record '0' in the cells of the other. All board members should be counted here (including the non-employees and the ones not in Ireland) In the baseline submission, you defined other senior management as *YYY*.

	Female	Male	Total
Board Members			

Executive Committee / C-Suite			
Other Senior Management			
Middle Management			
Junior Management			
Technical / Professional			
Other Employees			

Q5. Is your firm's CEO male or female?

- Male
- Female

Q6. Do you collect information on employees' gender identity?

- Yes *(go to Q6a)*
- No *(go to Q7)*

Q6a. Please report the number of employees within your firm in the Republic of Ireland as of the 1st of January 2024.

Note: Please provide these figures as total headcounts, not as full-time equivalent. If there are no employees in any category, please record '0'.

Cisgender (gender identity is the same as the sex assigned at birth)	
Transgender (gender identity is different from the sex assigned at birth)	
Other gender identities or expression (neither identify as male nor female)	

Section 3: Progress on Headline Targets

In 2023, your firm set targets for female representation. The following section will ask questions on the progress made on these targets. **The following questions use a forward feed, based on data previously provided by your firm.** For more information on target types and Charter commitments, please refer to: <https://www.esri.ie/current-research?keywords=women+in%20finance>

Please note: **Positive targets** aim at improving the level of female representation, at a given level. Targets must be ABOVE the level of female representation, at the level chosen, when setting the target. The deadline indicates when the firm aims to achieve its target. **Maintenance targets** aim at maintaining the level of female representation, for firms with 40% OR MORE of female representation at a given level. Targets must be at 40% or more. The deadline indicates until when the firm aims to maintain this level. It is a Charter requirement to set at least one positive target. The only exception is for firms with at least 40% female representation AT ALL LEVELS, which can set maintenance targets only.

This section is applicable to firms which set target for female representation.
The same questions will be asked for all targets set at different levels.

Q.13. Your firm set a headline target at XXX level, to achieve X% of female representation by Y.

If the deadline is before 2024 (Y<2024):

Q13(a). Has your firm met its target?

- Yes
- No *(go to Q13c)*

If the deadline is during or after 2024 (Y>=2024):

Q13(b). Is your firm on track to meet its target?

- Yes
- No *(go to Q13c)*

Q13(c). Why was this XXX target not met/not on track to being met?

- Target too ambitious
- Low number of female applicants at this level
- Reduced headcount growth / Drop in recruitment
- Hours required and demands of this position
- Low turnover at this level
- Restructuring / Merger / Acquisition
- Other, please specify: _____

Q14. Please provide a brief account of progress made towards these targets in the last calendar year (1st January 2023 – 31st December 2023):

Note: Firms that set negative targets or that were missing information on targets in previous surveys will be asked additional clarification questions here.

Section 4: Public communication

Q15a. Public communication of progress against these targets is required by signatories of the Charter. For more information on public communication, please refer to: <https://www.esri.ie/current-research?keywords=women+in%20finance>

Please provide a screenshot of your firm communication on the targets:

📁 Upload file

Q15b. and please provide the link where this communication is available:

Section 5: New Targets

Available to firms with negative and positive targets and to firms with targets

In this section, firms can opt to set new targets.

These targets are in addition to targets set during the baseline template. Please do not alter existing targets set in your baseline submission, such changes will be discarded.

Note: Positive targets are targets increasing the % of female representation at the chosen level.

Maintenance targets are targets maintaining the % of female representation. To set a maintenance target, your current level of female representation, at the chosen levels, has to be 40% or above.

Additionally, the target level has to be above 40% but can be below the current % of female representation at the chosen level.

Q16. Does your firm want to set any NEW targets for any of the following positions? If not, please move to the next section.

Note: Alternative/ Additional Targets are for firms whose organization does not correspond to the level proposed or firms with targets at additional levels (recruitment, interviews, etc.).

Board

Junior management

- Executive Committee/ C-Suite
- Senior management
- Middle management

- Technical / Professional level
- Other (go to Q16(c))

Q16(a).	Please provide details of your firm's NEW <u>headline</u> target for female representation at XXX level:	_____ %
Q16(b).	Please provide details of the timeframe by which your firm's NEW <u>headline</u> target is to be achieved:	_____ (DD/MM/YYYY)
Q16(c).	Would you like to set a NEW target: - at <u>OTHER level</u> (all other employees within your firm) - at a <u>DIFFERENT level</u> (level not mentioned above) - or provide <u>INFORMATION</u> on the target(s)	<input type="checkbox"/> Other (go to Q.16(a)) <input type="checkbox"/> Different (go to Q.16(a)) <input type="checkbox"/> Information (go to Q.17)
Q17.	Please use this space to provide any information on the targets set: _____	

Note: **XXX** refers to the level(s) chosen. The same questions will be asked for all targets set at different levels.

Section 6: Recruitment, Appointments and Retention

Q18. Which of the following are used in the recruitment of EXECUTIVE COMMITTEE / C-SUITE or OTHER SENIOR MANAGEMENT positions? Please tick all that apply.

- | | |
|--|---|
| <input type="checkbox"/> Internal HR Function | <input type="checkbox"/> External HR Function (e.g. head-hunters, search firms) |
| <input type="checkbox"/> Preliminary Shortlisting | <input type="checkbox"/> Word of Mouth / Recommendations from Network |
| <input type="checkbox"/> Interviews | <input type="checkbox"/> Aptitude Tests (e.g. numerical or verbal reasoning) |
| <input type="checkbox"/> Informal Discussions | <input type="checkbox"/> Job-Specific Work Tests (e.g. presentations, pitches) |
| <input type="checkbox"/> Psychological/Psychometric test | <input type="checkbox"/> Other, please specify: _____ |

Q19. When interviews are conducted at your firm, what is the average percentage of females included as interviewers on the interview panel?

- | | |
|---------------------------------|-------------------------------------|
| <input type="checkbox"/> 0- 24% | <input type="checkbox"/> 50-74% |
| <input type="checkbox"/> 25-49% | <input type="checkbox"/> 75-100% |
| <input type="checkbox"/> 50% | <input type="checkbox"/> Don't know |

Q20. Please record the number of appointees in each of the following positions, as well as the proportion of these that were internal (i.e. from within the firm) and external appointments.

If some of the categories do not apply in your firm, please record '0' in the corresponding cell.

	Number of Female Internal Appointments	Number of Female External Appointments	Number of Male Internal Appointments	Number of Male External Appointments
Executive Committee / C-Suite				
Other Senior Management				
Middle Management				
Junior Management				

Q21. Please record the number of employees, and their position, who left the firm between the 1st of January 2023 and the 31st of December 2023.

If some of the categories do not apply to your firm, please record '0' in the corresponding cell.

	Female	Male
Executive Committee / C-Suite		
Other Senior Management		
Middle Management		
Junior Management		
Technical / Professional		

Q22. Which of the following policies or arrangements are available within your firm?

	Yes	No
Working part-time / Reduced hours?	<input type="checkbox"/>	<input type="checkbox"/>
Flexible working hours / Flexitime?	<input type="checkbox"/>	<input type="checkbox"/>
Extended leave scheme (above statutory entitlements, e.g. additional maternity / paternity entitlements, career breaks, study leave....)	<input type="checkbox"/>	<input type="checkbox"/>
Additional maternity benefit (top-up)?	<input type="checkbox"/>	<input type="checkbox"/>
Additional paternity benefit (top-up)?	<input type="checkbox"/>	<input type="checkbox"/>

Q23. Have any of the policies or arrangements in your firm been taken up by EXECUTIVE COMMITTEE / C-SUITE or OTHER SENIOR MANAGEMENT in the last 12 months?

	Yes	No
Working part-time / Reduced hours?	<input type="checkbox"/>	<input type="checkbox"/>
Flexible working hours / Flexitime?	<input type="checkbox"/>	<input type="checkbox"/>
Extended leave scheme (above statutory entitlements, e.g. additional maternity / paternity entitlements, career breaks, study leave....)	<input type="checkbox"/>	<input type="checkbox"/>
Additional maternity benefit (top-up)?	<input type="checkbox"/>	<input type="checkbox"/>
Additional paternity benefit (top-up)?	<input type="checkbox"/>	<input type="checkbox"/>

Q24. Have any of the policies or arrangements in your firm been taken up by MIDDLE MANAGEMENT or JUNIOR MANAGEMENT in the last 12 months?

	Yes	No
Working part-time / Reduced hours?	<input type="checkbox"/>	<input type="checkbox"/>
Flexible working hours / Flexitime?	<input type="checkbox"/>	<input type="checkbox"/>
Extended leave scheme (above statutory entitlements, e.g. additional maternity / paternity entitlements, career breaks, study leave....)	<input type="checkbox"/>	<input type="checkbox"/>
Additional maternity benefit (top-up)?	<input type="checkbox"/>	<input type="checkbox"/>
Additional paternity benefit (top-up)?	<input type="checkbox"/>	<input type="checkbox"/>

Section 7: Working arrangements

Q.25. What is your firm policy in relation to remote working?

- Fully on-site/ in-person (*go to section 8*)
- Fully remote (*go to section 8*)
- Hybrid (partly on-site, partly remote) (*go to Q26*)

Q26. What is the main pattern of hybrid working in your firm?

Note: the main pattern refers to the situation of the majority of employees.

- Minimum 1 day a week on site
- Minimum 2 day a week on site
- Minimum 3 day a week on site
- Other, please specify: _____
- Minimum 4 day a week on site
- No minimum requirement of attendance
- Requirement differs - no dominant pattern

Q27. Do you all employees have the option to work remotely for part of the week?

- Yes
- No

Q28. Please select the most common working pattern for each employee category:

	Never work remotely	Work remotely for less than half the week	Work remotely for half the week	Work remotely for more than half the week	Always work remotely	Not applicable
Board						
Executive Committee						
Senior Management						
Middle Management						
Junior Management						
Technical / Professional						
Other						

Section 8: Progress & Challenges

Q29. Which of the following actions is your firm taking to support the achievement of the gender balance and inclusion targets?

- Examining hiring practices
- Improving flexible working
- Gender balance leader / diversity task force
- Identifying female leaders
- Unconscious bias training
- Sponsorship / mentoring opportunities
- Gender balanced shortlist of job candidates
- Female career development / leadership training
- Development programmes for women in middle / junior management
- Seeking better gender balance in succession planning
- Requiring improved gender diversity from search firms
- Setting gender targets for external recruitment
- Improving female representation on hiring panels
- Other, please specify: _____

Q30. Among the actions selected in Q25, please rank the 3 actions you consider the most effective.

Q31. What are the top three barriers for achieving gender balance and inclusion targets at your firm? Please select up to three options.

- Targets too ambitious
- Low number of female applicants
- Reduced headcount growth, drop in recruitment
- Hours and demands of senior positions
- Low turnover in senior management
- Restructuring/ merger/ acquisition
- Difficulty of attracting external talent
- Specificity of skills/ experience required
- Pipeline / lower internal female progression
- Other, please specify: _____

Q32. How is your firm demonstrating leadership and accountability for progress against the Charter? Please tick all that apply and specify any additional actions.

- Action plans
- Ownership by member of the senior management or board
- Key performance indicators
- Balanced scorecard
- Linking pay to performance on gender diversity targets
- Other, please specify: _____

Actions plan selected.

Q33a. Please, briefly detail your firm's action plan:

Actions plan not selected.

Q33b Please be reminded that having an action plan to improve your firm's gender balance is a requirement of the Charter.

Q34. Please use this space if you would like to provide any more information:

Thank You

Please remember to input the data you have collected through the online version of our template. You will be provided a link upon registration. If you have any questions about the Baseline Information Template, please contact Prof Helen Russell or Garance Hingre at the Economic and Social Research Institute at womeninfinance@esri.ie