



Ireland's Women in Finance Charter Annual Reporting Template 2022

Welcome to the 2022 Annual Reporting Template for Ireland's Women in Finance Charter. Thank you for agreeing to provide this data on behalf of your firm.

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. This is a PDF printable version of the template for reference; but we request that all information is inputted through the online form. The ESRI will issue you with a link to the online form in late 2022.

The data you will be asked to provide will be at the firm level, therefore no individuals within your firm will be rendered identifiable. Data gathered by this template is confidential and will be reported in an anonymised way only. All data will be stored securely by the Economic and Social Research Institute 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 2022 or the use of this data, please contact the ESRI research team at this address: womeninfinance@esri.ie.

Industry Partners



Data Partner



Section 1: Firm Profile

Q1. Please complete the following details on behalf of yourself and the firm you represent:

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 2022 to 31st of December 2022.

- Yes
 No

Q2a. If the data you are providing does not reflect the period of 1st of January 2022 to 31st of December 2022, please state the period to which your data pertains:

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Q3. Which of the following best describes the sector in which your firm operates? (Please select one option only.)

- | | | |
|---|--|--|
| <input type="checkbox"/> Aircraft Leasing | <input type="checkbox"/> Fund Administration | <input type="checkbox"/> Non-Bank Lending |
| <input type="checkbox"/> Banking | <input type="checkbox"/> General Insurance | <input type="checkbox"/> Payment Services |
| <input type="checkbox"/> Corporate Treasury | <input type="checkbox"/> Investment Management | <input type="checkbox"/> Pension Providers |
| <input type="checkbox"/> Credit Union | <input type="checkbox"/> Life Assurance | <input type="checkbox"/> Professional Advisory |
| <input type="checkbox"/> Financial Advisors | <input type="checkbox"/> Mortgage Intermediaries | <input type="checkbox"/> Securitisation |
| <input type="checkbox"/> Fintech | <input type="checkbox"/> Mortgage Lenders | <input type="checkbox"/> Wealth Management |
| <input type="checkbox"/> Other, please specify: _____ | | |

Q4. How would you best describe the ownership of your firm?

- Irish
 International

Q5. Has your business turnover changed in the last 12 months compared to the previous 12 months?

Note: This question will provide helpful background context for understanding changes in your firm over the past year.

- Increased
- Decreased
- Stayed the Same

Section 2: Key Metrics

Q6. Please report the number of male and female employees within your firm in the Republic of Ireland as of the 1st of January 2023. Please provide these figures as a total headcount, not by number in full-time employment.

	Female	Male	Total
Full-Time			
Part-Time			

Q7. 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 2023. Please provide these figures as a total headcount, not by number in full-time employment.

Note: Personnel should appear in one category only. If some of these positions do not apply to your firm, please record '0' in the corresponding cell.

Note: 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.

Note:

- **Other Senior Management** positions are those defined within your own firm (see Question 9 below) excluding board members and executive committee positions.
- **Middle Management** are managerial positions one layer below senior management.
- **Junior Management** consists of all other employees with managerial responsibilities.
- **Technical/Professional occupations** (without managerial responsibilities) are regarded as financial and non-financial positions that require specialist skills, education, or training, including (e.g. accountant, business analyst, human resources, IT, etc.).
- **Other occupations** include all other employees (e.g. clerical, administrative, sales, catering, etc.)

	Female	Male	Total
Board Members			
Executive Committee / C-Suite			
Other Senior Management			
Middle Management			
Junior Management			
Technical / Professional (with no managerial responsibilities)			
Other Occupations (with no managerial responsibilities)			

Q8. Please outline the roles you have defined as 'other senior management' within your firm:

Section 3: Progress on Headline Targets

Note: This section captures progress against headline targets set by your firm upon signing the Charter. Firms have committed to undertaking targets for female representation for various different roles within their organisation – some may apply to your firm, and some may not. The table below summarises all questions for each group: Board Members, Executive Committee / C-Suite, Other Senior Management, Middle Management, Junior Management, and Technical / Professional roles. In this paper version of the reporting template, for brevity's sake, the full question set are shown for just the Board Members group. In the online version of this reporting template, questions that are irrelevant to your firm's targets for each of these groups will not be displayed.

	A. Does your firm have a target for...?	B. Have you met this target...?	C. Why was target not met? <i>Open response</i>	D. Are you on track to meet your target?
Q9. Board	_____% <i>(Go to Q9B)</i> No <input type="checkbox"/> <i>(Go to Q10)</i>	Yes <input type="checkbox"/> <i>(Go to Q10)</i> No <input type="checkbox"/> <i>(Go to Q9C)</i> Deadline not yet passed <input type="checkbox"/> <i>(Go to Q9D)</i>	<i>(Go to Q10)</i>	Yes <input type="checkbox"/> <i>(Go to Q10)</i> No <input type="checkbox"/> <i>(Go to Q10)</i>
Q10. Ex-Committee / C-Suite	_____% <i>(Go to Q10B)</i> No <input type="checkbox"/> <i>(Go to Q11)</i>	Yes <input type="checkbox"/> <i>(Go to Q11)</i> No <input type="checkbox"/> <i>(Go to Q10C)</i> Deadline not yet passed <input type="checkbox"/> <i>(Go to Q10D)</i>	<i>(Go to Q11)</i>	Yes <input type="checkbox"/> <i>(Go to Q11)</i> No <input type="checkbox"/> <i>(Go to Q11)</i>
Q11. Other Senior Management	_____% <i>(Go to Q11B)</i> No <input type="checkbox"/> <i>(Go to Q12)</i>	Yes <input type="checkbox"/> <i>(Go to Q12)</i> No <input type="checkbox"/> <i>(Go to Q11C)</i> Deadline not yet passed <i>(Go to Q11D)</i>	<i>(Go to Q12)</i>	Yes <input type="checkbox"/> <i>(Go to Q12)</i> No <input type="checkbox"/> <i>(Go to Q12)</i>
Q12. Middle Management	_____% <i>(Go to Q12B)</i> No <input type="checkbox"/> <i>(Go to Q13)</i>	Yes <input type="checkbox"/> <i>(Go to Q13)</i> No <input type="checkbox"/> <i>(Go to Q12C)</i> Deadline not yet passed <input type="checkbox"/> <i>(Go to Q12D)</i>	<i>(Go to Q13)</i>	Yes <input type="checkbox"/> <i>(Go to Q13)</i> No <input type="checkbox"/> <i>(Go to Q13)</i>
Q13. Junior Management	_____% <i>(Go to Q13B)</i> No <input type="checkbox"/> <i>(Go to Q14)</i>	Yes <input type="checkbox"/> <i>(Go to Q14)</i> No <input type="checkbox"/> <i>(Go to Q13C)</i> Deadline not yet passed <input type="checkbox"/> <i>(Go to Q13D)</i>	<i>(Go to Q14)</i>	Yes <input type="checkbox"/> <i>(Go to Q14)</i> No <input type="checkbox"/> <i>(Go to Q14)</i>
Q14. Technical / Professional	_____% <i>(Go to Q14B)</i> No <input type="checkbox"/> <i>(Go to Q15)</i>	Yes <input type="checkbox"/> <i>(Go to Q15)</i> No <input type="checkbox"/> <i>(Go to Q14C)</i> Deadline not yet passed <input type="checkbox"/> <i>(Go to Q14D)</i>	<i>(Go to Q15)</i>	Yes <input type="checkbox"/> <i>(Go to Q15)</i> No <input type="checkbox"/> <i>(Go to Q15)</i>

In the online version of the reporting template Q9a to Q14d will appear in the following format for each of the roles of: Board Members; Executive Committee / C-Suite; Other Senior Management; Middle Management; Junior Management; and Technical / Professional roles. Respondents will only see the questions when they have confirmed their firm has set a target for the group in question.

Q9a. On signing the Charter your firm set targets for increasing female representation. Does your firm have a headline target for increasing female representation at BOARD level?

- Yes, please specify the percentage of female representation sought at this level: ____%
- No **(If 'No', you will be routed to Q10a)**

Q9b. Has your firm met its headline target for female representation at BOARD level?

- Yes **(If 'Yes', you will be routed to Q10a)**
- No **(If 'No' you will be routed to Q9c)**
- Our firm's deadline for this target has not yet passed. **(If you select this, you will be routed to Q9d)**

Q9c. If your firm's target for female representation at BOARD level was not met, please briefly explain the reasons why:

(Upon completion this question, you will be routed Q10a)

Q9d. Is your firm on track to meet its target for female representation at BOARD level?

- Yes
 - No
- (Upon completing this question, you will be routed to Q10a)**

Q15. Public communication of these targets is required by all Charter signatories. Please provide the link to where you publicly communicate your progress against these targets:

Q16. Please provide a brief account of progress made towards these targets in the last calendar year (1st January 2022 – 31st December 2022):

Section 4: Recruitment, Appointments & Retention

Q17. Which of the following are used in the recruitment of EXECUTIVE COMMITTEE / C-SUITE or OTHER SENIOR MANAGEMENT positions? Please tick all that apply.

Note: Please complete this question even if there have been no new appointments to the executive or senior management team in the last 12 months.

- | | |
|---|--|
| <input type="checkbox"/> Internal HR Function | <input type="checkbox"/> External HR Function (e.g. headhunters, 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"/> Other, please specify: _____ | |

Q18. When interviews are conducted at your firm, what is the average percentage of females included as interviewers on the interview panel?

- Less than 25%
 25% to under 50%
 50%
 Over 50%

Q19. Did your firm make any internal or external managerial level appointments in the 12 months from 1st of January 2022 and 31st of December 2022? This includes Executive-Committee / C-Suite, Other Senior Management, Middle Management, and Junior Management positions.

- Yes
 No

Q20. Please record the number of female and male 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	Total
Executive Committee / C-Suite					
Other Senior Management					
Middle Management					
Junior Management					

Q21. Please record the number of female and male employees, and their position, who left the firm between the 1st of January 2022 and the 31st of December 2022. If some of the categories do not apply to your firm, please record '0' in the corresponding cell.

	Female	Male	Total
Executive Committee / C-Suite			
Other Senior Management			
Middle Management			
Junior Management			
Technical / Professional (with no managerial responsibilities)			

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, term-time, etc.)	<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, term-time, etc.)	<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, term-time, etc.)	<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 5: Progress & Challenges

Q25. Which of the following actions is your firm taking to support the achievement of the gender balance and inclusion targets?

- | | |
|---|---|
| <input type="checkbox"/> Examining hiring practices | <input type="checkbox"/> Female career development / leadership training |
| <input type="checkbox"/> Improving flexible working | <input type="checkbox"/> Development programmes for women in middle / junior management |
| <input type="checkbox"/> Gender balance leader / diversity task force | <input type="checkbox"/> Seeking better gender balance in succession planning |
| <input type="checkbox"/> Identifying female leaders | <input type="checkbox"/> Requiring improved gender diversity from search firms |
| <input type="checkbox"/> Unconscious bias training | <input type="checkbox"/> Setting gender targets for external recruitment |
| <input type="checkbox"/> Sponsorship / mentoring opportunities | <input type="checkbox"/> Improving female representation on hiring panels |
| <input type="checkbox"/> None of the above | |
| <input type="checkbox"/> Other, please specify: _____ | |

Q26. Which of these do you consider the most important or effective actions? Please select up to three options.

- | | |
|---|---|
| <input type="checkbox"/> Examining hiring practices | <input type="checkbox"/> Female career development / leadership training |
| <input type="checkbox"/> Improving flexible working | <input type="checkbox"/> Development programmes for women in middle / junior management |
| <input type="checkbox"/> Gender balance leader / diversity task force | <input type="checkbox"/> Seeking better gender balance in succession planning |
| <input type="checkbox"/> Identifying female leaders | <input type="checkbox"/> Requiring improved gender diversity from search firms |
| <input type="checkbox"/> Unconscious bias training | <input type="checkbox"/> Setting gender targets for external recruitment |
| <input type="checkbox"/> Sponsorship / mentoring opportunities | <input type="checkbox"/> Improving female representation on hiring panels |
| <input type="checkbox"/> None of the above | |
| <input type="checkbox"/> Other, please specify: _____ | |

Q27. 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 required and demands of senior positions
- Low turnover in senior management
- Restructuring / Merger / Acquisition
- Other, please specify: _____

Q28. 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: _____

Q29. Would your firm be interested in providing insights for case study material for Ireland's Women in Finance Charter? If you select 'yes', ESRI will contact you for a brief discussion regarding your firm's experience with the Charter.

- Yes
- No
- I need more information

Q30. Please provide any general feedback or comments in the box below:

Thank You

Please remember to input the data you have collected through the online version of our template. If you have any questions about the 2022 Annual Reporting Template, please contact Prof Helen Russell or Dr Sarah Currigan at the Economic and Social Research Institute at womeninfinance@esri.ie