



Ireland's Women in Finance Charter: Annual Reporting Template 2023

Welcome to the 2023 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 2022. Please ensure that these steps have been completed before proceeding. Further information and guidance on the commitments of the Charter 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. This is a PDF printable version of the template for reference; but we request that all information is inputted through the online form. You will receive a link to the online form in early 2023.

The information 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. 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.

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	

Q2a. Please confirm that the data you are providing reflects the situation at your firm as of the 1st of January 2023.

- Yes
 No *(If 'No', please answer Q2b)*

Q2b. If the data you are providing does not reflect the situation at your firm as of the 1st of January 2023, please state the period to which your data pertains:

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Q3. Have employee numbers at your firm changed in the last 12 months compared to the previous 12 months?

- Increased
 Decreased
 Stayed the Same

Q4. Is your firm regulated by the Central Bank of Ireland?

- Yes
 No

Section 2: Key Metrics

Q5. Please report the number of male and female employees within your firm in the Republic of Ireland as of the 1st of January 2023. Board members who are not employees should not be included here. Please provide these figures as a total headcount, not as full-time equivalent.

	Female	Male	Total
Full-Time			
Part-Time			

Q6. Using the same employee categories used in your baseline data submission in 2022, please report the number of male and female employees and board members in the following positions 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 the full-time equivalent. 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. Personnel should appear in one category only.
- **Other Senior management** positions are those defined within your own firm (see next question below).
- **Middle management** are managerial positions one layer below senior management.
- **Junior management** consists of all other employees with managerial responsibilities.
- **Professional / technical occupations** (without managerial responsibilities) are regarded as financial and non-financial positions that require specialist skills, education, or training (e.g. accountant, business analyst, human resources, IT, etc.).
- **Other occupations** include all other employees within your firm (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)			

Q7. Please outline the roles you have defined as 'other senior management' within your firm:

Q8. Is your firm's CEO male or female?

- Male
 Female

Section 3: Progress on Headline Targets

In 2022, your firm set targets for female representation. In this section, please report on your progress towards all targets. The table below summarises all questions and response pathways for each employee category: Board Members, Executive Committee / C-Suite, Other Senior Management, Middle Management, Junior Management, and Technical / Professional roles.

	A. Did your firm set a target for female representation at level?	B. Has your firm met its headline target for female representation at level?	C. Why was this target for level not met? (Tick all that apply.)	D. Is your firm on track to meet its target for female representation at level?
Q9. Board	Yes <input type="checkbox"/> (Go to Q9B) No <input type="checkbox"/> (Go to Q10)	Yes <input type="checkbox"/> (Go to Q10) No <input type="checkbox"/> (Go to Q9C) Deadline not yet passed <input type="checkbox"/> (Go to Q9D)	<input type="checkbox"/> Target too ambitious <input type="checkbox"/> Low number of female applicants <input type="checkbox"/> Reduced headcount growth /recruitment <input type="checkbox"/> Hours required and demands of position	Yes <input type="checkbox"/> (Go to Q10) No <input type="checkbox"/> (Go to Q10)

			<input type="checkbox"/> Low turnover at this level <input type="checkbox"/> High turnover at this level <input type="checkbox"/> Restructuring / Merger <input type="checkbox"/> Other, please specify: _____ <p style="text-align: right;">(Go to Q10)</p>	
Q10. Ex-Committee / C-Suite	Yes <input type="checkbox"/> (Go to Q10B) No <input type="checkbox"/> (Go to Q11)	Yes <input type="checkbox"/> (Go to Q11) No <input type="checkbox"/> (Go to Q10C) Deadline not yet passed <input type="checkbox"/> (Go to Q10D)	<input type="checkbox"/> Target too ambitious <input type="checkbox"/> Low number of female applicants <input type="checkbox"/> Reduced headcount growth /recruitment <input type="checkbox"/> Hours required and demands of position <input type="checkbox"/> Low turnover at this level <input type="checkbox"/> High turnover at this level <input type="checkbox"/> Restructuring / Merger <input type="checkbox"/> Other, please specify: _____ <p style="text-align: right;">(Go to Q11)</p>	Yes <input type="checkbox"/> (Go to Q11) No <input type="checkbox"/> (Go to Q11)
Q11. Other Senior Management	Yes <input type="checkbox"/> (Go to Q12B) No <input type="checkbox"/> (Go to Q13)	Yes <input type="checkbox"/> (Go to Q13) No <input type="checkbox"/> (Go to Q12C) Deadline not yet passed <input type="checkbox"/> (Go to Q12D)	<input type="checkbox"/> Target too ambitious <input type="checkbox"/> Low number of female applicants <input type="checkbox"/> <input type="checkbox"/> <p style="text-align: right;">(Go to Q13)</p>	Yes <input type="checkbox"/> (Go to Q13) No <input type="checkbox"/> (Go to Q13)
Q12. Middle Management	Yes <input type="checkbox"/> (Go to Q12B) No <input type="checkbox"/> (Go to Q13)	Yes <input type="checkbox"/> (Go to Q13) No <input type="checkbox"/> (Go to Q12C) Deadline not yet passed <input type="checkbox"/> (Go to Q12D)	<input type="checkbox"/> Target too ambitious <input type="checkbox"/> Low number of female applicants <input type="checkbox"/> <input type="checkbox"/> <p style="text-align: right;">(Go to Q13)</p>	Yes <input type="checkbox"/> (Go to Q13) No <input type="checkbox"/> (Go to Q13)
Q13. Junior Management	Yes <input type="checkbox"/> (Go to Q13B) No <input type="checkbox"/> (Go to Q14)	Yes <input type="checkbox"/> (Go to Q14) No <input type="checkbox"/> (Go to Q13C) Deadline not yet passed <input type="checkbox"/> (Go to Q13D)	<input type="checkbox"/> Target too ambitious <input type="checkbox"/> Low number of female applicants <input type="checkbox"/> <input type="checkbox"/> <p style="text-align: right;">(Go to Q14)</p>	Yes <input type="checkbox"/> (Go to Q14) No <input type="checkbox"/> (Go to Q14)
Q14. Technical / Professional	Yes <input type="checkbox"/> (Go to Q14B) No <input type="checkbox"/> (Go to Q15)	Yes <input type="checkbox"/> (Go to Q15) No <input type="checkbox"/> (Go to Q14C) Deadline not yet passed <input type="checkbox"/> (Go to Q14D)	<input type="checkbox"/> Target too ambitious <input type="checkbox"/> Low number of female applicants <input type="checkbox"/> <input type="checkbox"/> <p style="text-align: right;">(Go to Q15)</p>	Yes <input type="checkbox"/> (Go to Q15) No <input type="checkbox"/> (Go to Q15)
Q15. Other Targets	Yes <input type="checkbox"/> (Go to Q15B) No <input type="checkbox"/> (Go to Q16)	Yes <input type="checkbox"/> (Go to Q16) No <input type="checkbox"/> (Go to Q15C) Deadline not yet passed <input type="checkbox"/> (Go to Q15D)	<input type="checkbox"/> Target too ambitious <input type="checkbox"/> Low number of female applicants <input type="checkbox"/> <input type="checkbox"/> <p style="text-align: right;">(Go to Q16)</p>	Yes <input type="checkbox"/> (Go to Q16) No <input type="checkbox"/> (Go to Q16)

Note: In the online version of the reporting template Q10a to Q16d will appear in the following format for each 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. Did your firm set a target for female representation at BOARD level?

- Yes
- No **If You Select 'No' You Will Be Routed to Q10a**

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

- Yes **If You Have Select 'Yes' You Will Be Routed to Q10a**
- No **If You Have Select 'Yes' You Will Be Routed to Q9c**
- Our firm's deadline for this target has not yet passed. **If Selected, You Will Be Routed to Q9d**

Q9c. Why was this target for BOARD level not met? (Tick all that apply).

- 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: _____

Upon completing this question, you will be routed to 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

Q16. Public communication of progress against these targets is required by signatories of the Charter. Please outline where you communicate this and provide the link if available.

Q17. Please provide a brief account of progress made towards your firm's targets in the last calendar year (1st January 2022 – 31st December 2022):

Section: 4: New Targets

Note: In this section firms can opt to set new targets; these are in addition to targets set during the baseline template. Using the data supplied on employees in the previous section, and considering existing levels of female representation at each layer in your firm, please state your new targets for increasing gender balance. At least one positive target must be set (i.e. a target which will increase existing female representation at one of the seven layers - board, executive committee, etc.). If your firm already has high levels of female representation (>40%) at all layers within your firm, then you can set target(s) to maintain existing levels of female representation.

Q18. Does your firm want to set any NEW targets for any of the following categories? Please do not alter existing targets set in your baseline submission, such changes will be discarded.

	Yes	No
Board	<input type="checkbox"/>	<input type="checkbox"/>
Executive Committee / C-Suite	<input type="checkbox"/>	<input type="checkbox"/>
Other Senior Management	<input type="checkbox"/>	<input type="checkbox"/>
Middle Management	<input type="checkbox"/>	<input type="checkbox"/>
Junior Management	<input type="checkbox"/>	<input type="checkbox"/>
Technical / Professional (with no managerial responsibilities)	<input type="checkbox"/>	<input type="checkbox"/>

Note: In the online survey, participants will be directed to Q19-24 as appropriate based on their responses to Q18 above.

Note: Targets set are to be expressed as percentage of female representation sought (%).

Q19a.	Please set your new headline target for female representation at BOARD level:	_____%
Q19b.	Please state the deadline by which your firm's target for female representation at BOARD level is to be achieved:	_____ (DD/MM/YYYY)
Q20a.	Please set your new headline target for female representation at EXECUTIVE COMMITTEE / C-SUITE level:	_____%
Q20b.	Please state the deadline by which your firm's target for female representation at EXECUTIVE COMMITTEE / C-SUITE level is to be achieved:	_____ (DD/MM/YYYY)
Q21a.	Please set your new headline target for female representation at SENIOR MANAGEMENT level:	_____%
Q21b.	Please state the deadline by which your firm's target for female representation at SENIOR MANAGEMENT level is to be achieved:	_____ (DD/MM/YYYY)
Q22a.	Please set your new headline target for female representation at MIDDLE MANAGEMENT level:	_____%
Q22b.	Please state the deadline by which your firm's target for female representation at MIDDLE MANAGEMENT level is to be achieved:	_____ (DD/MM/YYYY)
Q23a.	Please set your new headline target for female representation at JUNIOR MANAGEMENT level:	_____%
Q23b.	Please state the deadline by which your firm's target for female representation at JUNIOR MANAGEMENT level is to be achieved:	_____ (DD/MM/YYYY)
Q24a.	Please set your new headline target for female representation at TECHNICAL / PROFESSIONAL level:	_____%
Q24b.	Please state the deadline by which your firm's target for female representation at TECHNICAL / PROFESSIONAL level is to be achieved:	_____ (DD/MM/YYYY)

Section 5: Recruitment, Appointments & Retention

Q25. Which of the following are used by your firm 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 executive or senior management positions in the last 12 months.

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

Q26. When interviews are conducted at your firm, what is (on average) the percentage of females included as interviewers on the interview panel?

- 0-24%
 25-49%
 50-74%
 75-100%
 Don't Know / Information not available

Q27. Please record the number of female and male appointees in each of the following positions, indicating whether these were internal (i.e. from within the firm) or external appointments. If some of the categories do not apply in your firm or if no appointments were made, 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					

Q28. 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)			

Q29. Which of the following policies or arrangements are available within your firm?

	Yes	No
Parental Leave?	<input type="checkbox"/>	<input type="checkbox"/>
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"/>

Q30. Have any of these policies / arrangements been taken up by EXECUTIVE COMMITTEE / C-SUITE or OTHER SENIOR MANAGEMENT in the last 12 months?

	Yes	No
Parental Leave?	<input type="checkbox"/>	<input type="checkbox"/>
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"/>

Q31. Have any of these policies / arrangements been taken up by MIDDLE MANAGEMENT or JUNIOR MANAGEMENT in the last 12 months?

	Yes	No
Parental Leave?	<input type="checkbox"/>	<input type="checkbox"/>
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 6: Progress & Challenges

Q32. Which of the following actions is your firm taking to support the achievement of your 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"/> Gender balanced shortlist of job candidates |
| <input type="checkbox"/> Other, please specify: _____ | |

Q33. Which of these do you consider the most 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"/> Gender balanced shortlist of job candidates |
| <input type="checkbox"/> Other, please specify: _____ | |

Q34. If there have been any other developments or initiatives at your firm in the last calendar year (1st January 2022 to 31st December 2022) that have contributed to improving gender balance, please describe:

Q35. 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: _____

Q36. 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: _____

Q37. 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

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 Annual Reporting Template, please contact Prof Helen Russell or Dr Sarah Curristan at the Economic and Social Research Institute at womeninfinance@esri.ie