



Ireland's Women in Finance Charter Baseline Data Template

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

The completion of the Baseline Data Template is only for firms who are new signatories to Ireland's Women in Finance Charter. All financial services firms are eligible to become signatories to the Charter. You can sign up to the Charter and find further information and guidance on the commitments of the Charter at: <https://www.betterbalance.ie/partners/> Please ensure that these steps have been completed before proceeding.

In the following Baseline Data 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. 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 when you register.

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 Baseline Information 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:

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"/> General Insurance | <input type="checkbox"/> Non-Bank Lending |
| <input type="checkbox"/> Banking | <input type="checkbox"/> Investment Management | <input type="checkbox"/> Payment Services |
| <input type="checkbox"/> Corporate Treasury | <input type="checkbox"/> Legal Services | <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"/> Fund Administration | <input type="checkbox"/> Other, please specify: _____ | |

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

- Irish
 International

Q5. Have employee numbers at your firm changed in the last 12 months compared to the previous 12 months?

- Increased
 Decreased
 Stayed the Same

Q6. Is your firm regulated by the Central Bank of Ireland?

- Yes
 No

Section 2: Key Metrics

Q7. 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			

Q8a. Does your firm collect information on gender identity?

Note: We would like to find out the proportion of firms who collect this data, with a view to including this information, if available, in future annual reporting templates for the Charter.

- Yes *(If yes, please answer Q8b)*
 No

Q8b. If yes, what language / terminology do you use in collecting this information?

Q9. Are the Board and the Executive Committee the same within your firm?

- Yes
 No

Q10. 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)			

Q11. Please outline the roles you have defined as 'other senior management' within your firm:

Q12. Is your firm's CEO male or female?

- Male
- Female

Section 3: Headline Targets

Note: 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 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 you already have high levels of female representation (>40%) **at all layers** within your firm, **then** you can set a target(s) to maintain existing levels of female representation.

If you do not have a target for a particular layer, select 'No'. If you have targets that do not fit into the categories provided, e.g. if you have a target that combines a number of layers, please describe the target in the open text box at the end of the section.

Q13a.	Does your firm have any headline or interim targets for female representation at BOARD level?	<input type="checkbox"/> Yes <input type="checkbox"/> No <i>(If 'No' go to Q.14a)</i>
Q13b.	Please provide details of your firm's <u>headline</u> target for female representation at BOARD level:	_____ %
Q13c.	Please provide details of the timeframe by which your firm's <u>headline</u> target for female representation at BOARD level is to be achieved:	_____ (DD/MM/YYYY)
Q13d.	Please provide details of your firm's <u>interim</u> target for female representation at BOARD level:	_____ %
Q13e.	Please provide details of the timeframe by which your firm's <u>interim</u> target for female representation at BOARD level is to be achieved:	_____ (DD/MM/YYYY)
Q14a.	Does your firm have any headline or interim targets for female representation at EXECUTIVE-COMMITTEE / C-SUITE level?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Q14b.	Please provide details of your firm's <u>headline</u> target for female representation at EXECUTIVE-COMMITTEE / C-SUITE level:	_____ %
Q14c.	Please provide details of the timeframe by which your firm's <u>headline</u> target for female representation at EXECUTIVE-COMMITTEE / C-SUITE level is to be achieved:	_____ (DD/MM/YYYY)
Q14d.	Please provide details of your firm's <u>interim</u> target for female representation at EXECUTIVE-COMMITTEE / C-SUITE level:	_____ %
Q14e.	Please provide details of the timeframe by which your firm's <u>interim</u> target for female representation at EXECUTIVE-COMMITTEE / C-SUITE level is to be achieved:	_____ (DD/MM/YYYY)
Q15a.	Does your firm have any headline or interim targets for female representation at OTHER SENIOR MANAGEMENT level?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Q15b.	Please provide details of your firm's <u>headline</u> target for female representation at OTHER SENIOR MANAGEMENT level:	_____ %
Q15c.	Please provide details of the timeframe by which your firm's <u>headline</u> target for female representation at OTHER SENIOR MANAGEMENT level is to be achieved:	_____ (DD/MM/YYYY)
Q15d.	Please provide details of your firm's <u>interim</u> target for female representation at OTHER SENIOR MANAGEMENT level:	_____ %
Q15e.	Please provide details of the timeframe by which your firm's <u>interim</u> target for female representation at OTHER SENIOR MANAGEMENT level is to be achieved:	_____ (DD/MM/YYYY)
Q16a.	Does your firm have any headline or interim targets for female representation at MIDDLE MANAGEMENT level?	<input type="checkbox"/> Yes

Q16b	Please provide details of your firm's <u>headline</u> target for female representation at MIDDLE MANAGEMENT level:	<input type="checkbox"/> No _____ %
Q16c.	Please provide details of the timeframe by which your firm's <u>headline</u> target for female representation at MIDDLE MANAGEMENT level is to be achieved:	_____ (DD/MM/YYYY)
Q16d	Please provide details of your firm's <u>interim</u> target for female representation at MIDDLE MANAGEMENT level:	_____ %
Q16e.	Please provide details of the timeframe by which your firm's <u>interim</u> target for female representation at MIDDLE MANAGEMENT level is to be achieved:	_____ (DD/MM/YYYY)
Q17a.	Does your firm have any headline or interim targets for female representation at JUNIOR MANAGEMENT level?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Q17b	Please provide details of your firm's <u>headline</u> target for female representation at JUNIOR MANAGEMENT level:	_____ %
Q17c.	Please provide details of the timeframe by which your firm's <u>headline</u> target for female representation at JUNIOR MANAGEMENT level is to be achieved:	_____ (DD/MM/YYYY)
Q17d	Please provide details of your firm's <u>interim</u> target for female representation at JUNIOR MANAGEMENT level:	_____ %
Q17e.	Please provide details of the timeframe by which your firm's <u>interim</u> target for female representation at JUNIOR MANAGEMENT level is to be achieved:	_____ (DD/MM/YYYY)
Q18a.	Does your firm have any headline or interim targets for female representation at the TECHNICAL / PROFESSIONAL level?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Q18b	Please provide details of your firm's <u>headline</u> target for female representation at the TECHNICAL / PROFESSIONAL level:	_____ %
Q18c.	Please provide details of the timeframe by which your firm's <u>headline</u> target for female representation at the TECHNICAL / PROFESSIONAL level is to be achieved:	_____ (DD/MM/YYYY)
Q18d	Please provide details of your firm's <u>interim</u> target for female representation at the TECHNICAL / PROFESSIONAL level:	_____ %
Q18e.	Please provide details of the timeframe by which your firm's <u>interim</u> target for female representation at the TECHNICAL / PROFESSIONAL level is to be achieved:	_____ (DD/MM/YYYY)

Q19a. If your firm has any other targets regarding female representation, please give a detailed description of them below and the positions in your firm they relate to:

Q19b. Please provide details of the timeframe by which this target is to be achieved: _____ (DD/MM/YYYY)

Q20. Public communication of these progress against these targets is required by signatories of the Charter. Please provide outline where you will communicate these targets and provide the link if available.

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 Dr Sarah Curristan at the Economic and Social Research Institute at womeninfinance@esri.ie