



IRI is currently conducting a survey of our asset manager, distributor, and insurer members. With the data collected, we can help organizations identify areas for improvement while also informing our understanding of industry-wide opportunities for action as it pertains to DEI.

IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

Thank you for participating in IRI's Diversity, Equity and Inclusion (DEI) survey of members. The results of this survey will assist IRI and its members with benchmarking best practices, and developing proactive DEI programs and policies. Please do your best to complete all questions, and if you are not the appropriate individual to complete the survey please let us know who should receive it. IRI is committed to leading our membership forward with respect to DEI, and surveys like these help us understand the landscape and better serve our members.

* 1. Member Information

Name

Company

Title

Email Address

Phone Number

* 2. What type of firm do you represent?

- Asset Manager
- Distributor
- Insurer
- Other (please specify)

* 3. What is your firm's ownership structure?

- Stock
- Mutual
- Private equity
- Privately held
- Other (please specify)

* 4. What is your firm's approximate annual U.S. revenue?

- Less than \$50 million
- \$50 million to less than \$100 million
- \$100 million to less than \$1 billion
- \$1 billion to less than \$10 billion
- \$10 billion to less than \$25 billion
- \$25 billion to less than \$50 billion
- \$50 billion to less than \$75 billion
- \$75 billion or more

* 5. What is the location of your headquarters?

City

State

Country



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* 6. How many TOTAL individuals does your firm employ?

* 7. How many individuals does your firm employ *at the VP level and above?*

* 8. How many individuals sit on your company's *Board of Directors?*



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9. What is the annual attrition rate for each of the below groups of your company's employees/representatives? Enter a numeric value, or N/A if information is not available.

ALL employees

VP and above



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

* 10. Does your company track employee gender beyond male/female?

Yes

No



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11. What is the gender distribution among ALL your company's employees? Please enter a one or two digit number representing the percentage of employees in each category, which must total to 100. If your company does not track extended gender categories, please enter only your male and female percentages totaling to 100.

Male

Female

Transgender Male

Transgender Female

Gender Variant / Non-Conforming

Non-Binary

Other



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

12. What is the gender distribution among your company's employees *at the VP level and above*? Please enter a one or two digit number representing the percentage of employees in each category, which must total to 100. If your company does not track extended gender categories, please enter only your male and female percentages totaling to 100.

Male

Female

Transgender Male

Transgender Female

Gender Variant / Non-Conforming

Non-Binary

Other



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

13. What is the gender distribution among your company's *Board of Directors*? Please enter a one or two digit number representing the percentage of employees in each category, which must total to 100. If your company does not track extended gender categories, please enter only your male and female percentages totaling to 100.

Male

Female

Transgender Male

Transgender Female

Gender Variant / Non-Conforming

Non-Binary

Other



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

14. What is the annual attrition rate for ALL employees in your company, broken down by gender? Please enter a one or two digit number representing the percentage of employees in each category. If your company does not track extended gender categories, please enter only your male and female percentages.

Male

Female

Transgender male

Transgender female

Gender Variant / Non-Conforming

Non-Binary

Other



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

15. What percentage of ALL your company's employees self-identify as LGBTQ+? Enter a numeric value from 1 to 100, or N/A if information is not available.

16. What percentage of your company's employees at the VP level and above self-identify as LGBTQ+? Enter a numeric value from 1 to 100, or N/A if information is not available.

17. What percentage of your company's Board of Directors self-identify as LGBTQ+? Enter a numeric value from 1 to 100, or N/A if information is not available.

18. What is the attrition rate among employees who self-identify as LGBTQ+? Enter a numeric value from 1 to 100, or N/A if information is not available.

19. Please check the box below as applicable.

My company does not track whether employees self-identify as LGBTQ+



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

20. What percentage of ALL your company's employees fall into each of the below age ranges? Please enter a one or two digit number representing the percentage of employees in each range, which must total to 100.

18 - 29

30 - 39

40 - 49

50 - 59

60+

21. Please check the box below as applicable.

My company does not track employees by age range.



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

22. What percentage of your company's employees *at the VP level and above* fall into each of the below age ranges? Please enter a one or two digit number representing the percentage of employees in each range, which must total to 100.

18 - 29

30 - 39

40 - 49

50 - 59

60+

23. Please check the box below as applicable.

My company does not track employees at the VP level and above by age range.



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

* 24. What percentage of your company's Board of Directors fall into each of the below age ranges? Please enter a one or two digit number representing the percentage of employees in each range, which must total to 100.

18 - 29

30 - 39

40 - 49

50 - 59

60+

25. Please check the box below as applicable.

My company does not track Board of Director members by age range.



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

26. What is the racial distribution among ALL your company's employees? Please enter a one or two digit number representing the percentage of employees in each category, which must total to 100.

Asian / Pacific Islander	<input type="text"/>
Black or African American	<input type="text"/>
Hispanic or Latino	<input type="text"/>
Native American or American Indian	<input type="text"/>
White or Caucasian	<input type="text"/>
Other	<input type="text"/>

27. Please check the box below as applicable.

My company does not track employees by racial distribution.



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

28. What is the racial distribution among your company's employees at the *VP level and above*? Please enter a one or two digit number representing the percentage of employees in each category, which must total to 100.

Asian / Pacific Islander

Black or African American

Hispanic or Latino

Native American or
American Indian

White or Caucasian

Other

29. Please check the box below as applicable.

My company does not track VP and above by racial distribution.



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

30. What is the racial distribution among your company's *Board of Directors*? Please enter a one or two digit number representing the percentage of employees in each category, which must total to 100.

Asian / Pacific Islander

Black or African American

Hispanic or Latino

Native American or
American Indian

White or Caucasian

Other

31. Please check the box below as applicable.

My company does not track Board of Director members by racial distribution.



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

32. What is the annual attrition rate among ALL your company's employees by racial designation? Please enter a one or two digit number representing the percentage attrition rate for each category, or N/A if unknown.

Asian / Pacific Islander	<input type="text"/>
Black or African American	<input type="text"/>
Hispanic or Latino	<input type="text"/>
Native American or American Indian	<input type="text"/>
White or Caucasian	<input type="text"/>
Other	<input type="text"/>

33. Please check the box below as applicable.

My company does not track attrition for all employees by racial designation.



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

34. What is the annual attrition rate for your company's employees *at the VP level and above* by racial designation? Please enter a one or two digit number representing the percentage attrition rate for each category, or N/A if unknown.

Asian / Pacific Islander

Black or African American

Hispanic or Latino

Native American or
American Indian

White or Caucasian

Other

35. Please check the box below as applicable.

My company does not track attrition for VP and above by racial designation.



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

36. What percentage of each of the below groups of your company's employees/representatives are veterans? Enter a numeric value, or N/A if information is not available.

ALL employees

VP and above

Board of Directors

37. What is the annual attrition rate for your employees who are veterans? Enter a numeric value, or N/A if information is not available.

38. Please check the box below as applicable.

My company does not track veteran status.



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

39. What percentage of each of the below groups of your company's employees/representatives have self-identified an impairment, disability, or handicap? Enter a numeric value, or N/A if information is not available.

ALL employees

VP and above

Board of Directors

40. What is the annual attrition rate for your company's employees who have self-identified an impairment, disability, or handicap? Enter a numeric value, or N/A if information is not available.

41. Please check the box below as applicable.

My company does not track disability status.



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

42. What percentage of ALL your employees fall into each of the below ranges of tenure? Please enter a one or two digit number representing the percentage of employees in each range, which must total to 100.

Less than 2 years

2 to less than 5 years

5 to less than 10 years

10 years or longer

43. What is the annual attrition rate for your company's employees broken down by tenure? Please a numeric value, or N/A if information is not available.

Less than 2 years

2 to less than 5 years

5 to less than 10 years

10 years or longer

44. Please check the box below as applicable.

My company does not track tenure of employees.



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

45. What percentage of your employees *at the VP level or above* fall into each of the below ranges of tenure? Please enter a one or two digit number representing the percentage of employees in each range, which must total to 100.

Less than 2 years

2 to less than 5 years

5 to less than 10 years

10 years or longer

46. What is the annual attrition rate for your company's employees *at the VP level or above* broken down by tenure? Please a numeric value, or N/A if information is not available.

Less than 2 years

2 to less than 5 years

5 to less than 10 years

10 years or longer

47. Please check the box below as applicable.

My company does not track tenure of VP level and above.



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

48. What percentage of your company's *Board of Directors* fall into each of the below ranges of tenure? Please enter a one or two digit number representing the percentage of employees in each range, which must total to 100.

Less than 2 years

2 to less than 5 years

5 to less than 10 years

10 years or longer

49. Please check the box below as applicable.

My company does not track tenure of members of the Board of Directors.



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

50. Please indicate which of the following talent retention best practices your company currently uses. Check all that apply.

- Employee resource groups, diversity councils, or equivalent
- Retention groups or programs focused on minority employees
- Mentorship and/or sponsorship programs
- Minority leadership development programs
- Mandatory inclusion and unconscious bias training for all staff
- Mandatory inclusions and unconscious bias training for all managers
- Annual pay disparity analysis
- Standardized performance evaluations
- VP or above position dedicated to diversity, equity and inclusion
- Conduct bias audits on policies, practices, job descriptions, etc.
- None of the above

What other talent retention best practices does your company use that you would like to share?



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

51. Please indicate which of the following talent acquisition best practices your company currently uses. Select all that apply.

- Diversity hiring goals
- Dedicated diversity hiring programs
- Recruiting programs at HBCUs
- Recruiting programs at Hispanic-serving institutions
- Require diversity among considered candidates
- Sourcing tracking for new hires
- Blinded resume review
- Standardized interview questions
- Committee-based hiring
- None of the above

What other talent acquisition best practices does your company use that you would like to share?



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52. Where do you source the majority of your employees?

- Social Media
- Referrals
- College recruiting
- Job boards

Other (please specify)



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

53. Where do you source the majority of your diverse employees?

- Social Media
- Referrals
- College recruiting
- Job boards

Other (please specify)



IRI Diversity, Equity and Inclusion (DEI) Benchmarking Survey

54. Please add any additional thoughts or comments you may have about DEI or this survey, and thank you for your participation!