# FAIR360

**The Fair360 Workplace Fairness Survey**

# Welcome to the Fair360 Workplace Fairness Survey

**Hospitals and Health Systems**
Hospitals and health systems will complete the same survey as other major U.S. employers. Q5-5A are designed only for Hospitals and health systems.

# Contact Us

To understand the language used in the survey, view our Glossary of Terms and FAQs. For any other questions, please email survey@fair360.com .

The following section will ask you for your organization's contact information, followed by questions assessing your organizational structure.

## Company Profile – [Q1-Q5]

Q1. Please provide the following information about your company and U.S. headquarters *(write "NA" if not applicable for City, State and Zip Code)*:
*Note: The company name entered here will be used in your free report card.*
    A. Company name     _____
    B. City     _____
    C. State / Province / Region     _____
    D. Zip Code     _____
    E. Country     _____
    F. Corporate website     _____

Q2. Please provide contact information for the *most senior level executive or manager responsible for U.S. management*:
    A. First name     _____
    B. Middle initial     _____
    C. Last name     _____
    D. Title     _____
    E. Email     _____
    F. Phone (primary: no dashes)

Q3. Please provide contact information for the *head of human resources*:
    A. First name     _____
    B. Middle initial     _____
    C. Last name     _____
    D. Title     _____
    E. Email     _____
    F. Phone (primary: no dashes)     _____

Q4. Choose the NAICS industry code that **best** describes your main business.
*Note:* The definition of 2024 North American Industry Classification System (NAICS) industry codes (listed next to each industry) can be found in this Census Bureau web document: Definition. For the Fair360 survey definition of the NAICS, please see item 1.4 in the Glossary of Terms.

A. Accommodation and Food Services (72)
B. Administrative and Support and Waste Management and Remediation Services (56)
C. Agriculture, Forestry, Fishing and Hunting (11)
D. Arts, Entertainment and Recreation (71)
E. Construction (23)
F. Educational Services (61)
G. Finance and Insurance (52)
H. Health Care and Social Assistance (62)
I. Information (51)
J. Management of Companies and Enterprises (55)
K. Manufacturing (31-33)
L. Mining, Quarrying and Oil and Gas Extraction (21)
M. Other Services (except Public Administration) (81)
N. Professional, Scientific and Technical Services (54)
O. Public Administration (92)
P. Real Estate and Rental and Leasing (53)
Q. Retail Trade (44-45)
R. Transportation and Warehousing (48-49)
S. Utilities (22)
T. Wholesale Trade (42)
U. Other: Please specify the NAICS Codes not listed above. _____

Q5. Is your company completing the survey as a hospital and health system?
A. Yes
B. No

Q5A. Please indicate the percentage of physicians and nurses who are members of *at least* one **Employee Resource Group (ERG)**.
*Note: Enter a number between zero (0.0) and one hundred (100.0). If not applicable or the answer is unknown, leave the input box blank. The percentage must be based on the overall number of physicians and nurses within your workforce.*

|  | Percent |
|---|---|
| Percentage of physicians who are members of at least one resource group |  |
| Percentage of nurses who are members of at leastone resource group |  |

# Organizational Structure – [Q6-Q10]

Now that you have provided your contact information, we will ask a few questions about your organizational structure and responsibilities.

Q6. Who chairs the Executive HR Council?
   A. CEO chairs or co-chairs the Council
   B. A direct report of the CEO chairs the Council
   C. An executive who does not report to the CEO chairs the Council
   D. Other (*please specify*)

Q7. How are members of your Executive HR Council selected? (*Select all that apply*)
   A. Selected by the Council chair
   B. Nominated by Council members
   C. Self-selected
   D. Other (*please specify*)

Q8. Who sets the agenda for the Executive HR Council?
   A. CEO sets the agenda or partially sets the agenda
   B. A direct report of the CEO sets the agenda
   C. An executive who does not report to the CEO sets the agenda
Other (*please specify*)

Q9. Who does the most senior-level Inclusion executive or manager report to in your organization?
(*Please select all that apply in the event of dual reporting*):
   A. CEO (*Chief Executive Officer*) or similar
   B. COO (*Chief Operating Officer*) or similar
   C. CAO (*Chief Administrative Officer*) or similar
   D. CHRO *(Chief Human Resources Officer*) or similar
Other (*please specify*)

Q9a. Please identify the formal inclusion responsibilities for each of the following groups: (*Select all that apply*) For the Fair360 survey definition of fair, please see item 1.1 in the Glossary of Terms.

| A. Board of Directors | Promoting talent fairly | Monitoring workforce representation | Monitoring Supplier Fairness results | Sponsoring cultural awareness and/or inclusive workplace events | Setting and/or approving enterprise inclusive workplace goals | Other |
|---|---|---|---|---|---|---|
| B. Executive HR Council(s) | Promoting talent fairly | Monitoring workforce representation | Monitoring Supplier Fairness results | Sponsoring cultural awareness and/or inclusive workplace events | Setting and/or approving enterprise inclusive workplace goals | Other |

Q9b.How often does each of the following meet (meetings can be in person orvirtual)? Note that if subcommittees meet more frequently than the main body, you may select the more frequent meeting cadence.

| A. Board of Directors | Every month | Every other month | Every quarter | Three times a year | Twice a year | Once per year | Less than once per year |
|---|---|---|---|---|---|---|---|
| B. Executive HR Council(s) | Every month | Every other month | Every quarter | Three times a year | Twice a year | Once a year | Less than once per year |

Q10. Please answer the following questions with whole numbers.
*Note: The full-time employees' number pertains to those employees who specifically work in your workplace Inclusion department and does not include dotted-line or matrix employees in other functions of the company. However, the number of employees having some Inclusion responsibilities refers to the number of employees in other departments (for example, the marketingdepartment) with some responsibility or accountability for Inclusion within their own department.*

A. How many **full-time (or equivalent) employees** in your company are responsible for Inclusion?
*Please type your response (whole numbers only; no decimals) into the field below. If not applicable or the answer is unknown, leave the field(s) blank.*  _____

B. How many direct reports does the CIO (*Chief Inclusion Officer* or equivalent) have at your company?
*Please type your response (whole numbers only; no decimals) into the field below. If not applicable or the answer is unknown, leave the field(s) blank.*  _____

C. What percentage of members of your senior leadership (levels 1 and 2) have formal inclusion responsibilities? For the Fair360 survey definition of Senior Leadership, please see item 2.11 in the Glossary of Terms.
*Please type your response (whole numbers only; no decimals) into the field below. If not applicable or the answer is unknown, leave the field(s) blank.*

# Human Capital Metrics – [Q18-Q25]

The following section is designed to collect information on your human capital metrics.

**About this section.** In this section, you will be asked to report total counts for intersectionality (gender: female, male, non-binary, unknown; and ethnicity: Black, Asian, Native Hawaiian/other Pacific Islander, Native American/Alaskan Native, Latino or Hispanic, two or more races/ethnicities, Other, Unknown) for your workforce. *You have the option to report human capital metrics based on your organization's fiscal year rather than the traditional calendar year (Jan. 1 to Dec. 31).*

You may want to consider responding to this section in partnership with your human resources division or any staff who manages data or reporting for human capital metrics.

**What you will be asked.** Specifically, you will be asked to provide the gender and ethnicity composition for the following categories:

1. **Overall workforce**
   a. Overall totals (entire U.S. workforce)
   b. Hourly
   c. Non-hourly exempt
   d. New hire totals
   e. Promotions to management
   f. Turnover
      i. Involuntary
      ii. Voluntary
      iii. Retirement
   g. Highest paid 10%
2. **Overall management**
   a. Overall totals (all U.S. management)
      i. Including subtotals for level 1, level 2, level 3 and level 4
   b. New hire totals
   c. Promotions within management
   h. Turnover
      i. Involuntary
      ii. Voluntary
      iii. Retirement
3. **Special populations**
   a. Veterans' percentage (overall workforce, overall management, levels 1-4 management)
   b. People with disabilities percentage (overall workforce, overall management, levels 1-4 management)
   c. LGBTQ+ percentage (overall workforce, overall management, levels 1-4 management)
4. **Organizational divisions**
   a. Board of Directors
   b. Executive HR Council

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Q12. Which of the following ways would you prefer to enter your data?
    A.  Enter the data for each question on the screen in Momentive
    B.  Download a form and upload that form to Momentive

*Note:* You may change your selection any time by navigating back to this question and selecting the desired response. When you select the "forward" arrow, the appropriate questions and your choice will then display.

You will be asked to complete a series of tables for human capital metrics across your workforce, which includes categories for "*Other"* and *"Unknown*" for both ethnicity and gender.

"*Other*" should only be used for instances where the existing categories do not capture the ethnicity or gender that are listed. "*Unknown*" should only be used when an employee chooses not to self-identify (self-ID).

[DISPLAY TABLE UPLOAD PAGE IF 12 = B]

Please **click here** to download the Human Capital Excel template.

Q13. Please upload your human capital metrics using the field below. **Note:** The file must be saved in the .xlsx format. Do not modify the template other than to add your data (i.e., do not change formatting, add formulae, etc.).
    A. {Upload field}

Q14. Does your company use "*other"* for any other reason than what is listed above?
    A. Yes
    B. No
Q15. [DISPLAY IF 14A = YES] Please describe how "*other*" is used in human capital metrics by your company.

_____

Q17. How many employees did your company have at the end of the previous calendar year or fiscal year?
*Note: The gray cell value (total) is automatically calculated. Please enter only whole numbers. The maximum digits allowed is nine. "U.S." includes employees in Puerto Rico, Guam, and other U.S. territories.*

|  | Number of employees |
|---|---|
| U.S. |  |
| Non-U.S. |  |
| Total |  |

Please answer each of the following questions by filling out the tables listed below with your organization's human capital metrics. You can refer to the definitions by reviewing the table below or accessing our Glossary of Terms.

| Category | Definition |
|---|---|
| **Board of Directors** | U.S. Board of Directors. Use global board if you do not have a U.S. board. If you do not have any Board, please enter zeros in the corresponding fields. For the Fair360 survey definition of Board of Directors, please see item 2.12 in the Glossary of Terms. |
| **Executive HR Council** | The internal Council, which is comprised of high-level leaders or management levels 1 through 4 only. (See below Executive HR Council/Human Resources staff for the explanation of the management levels.) If you do not have an Executive HR Council, please enter zeros in the corresponding fields. For the Fair360 survey definition of Executive HR Council, please see item 2.13 in the Glossary of Terms. |
| **Workforce** | U.S. workforce including Alaska, Hawaii, Puerto Rico or any other U.S. territories. The workforce includes all employees, both management and non-management. Sometimes we use the term "total workforce," which is synonymous with "workforce." For the Fair360 survey definition of Overall Workforce, please see item 2.5 in the Glossary of Terms. |
| **Workforce hourly** | U.S. workforce paid on an hourly basis for the amount of time spent working, including Alaska, Hawaii, Puerto Rico or any other U.S. territories. The workforce includes all employees, both management and non-management. |
| **Workforce non-hourly exempt** | U.S. workforce employees who are exempt from hourly and overtime pay, including Alaska, Hawaii, Puerto Rico or any other U.S. territories. The workforce includes all employees, both management and non-management. |
| **Workforce new hires** | All the new hires into workforce (as defined above) during the survey year (from Jan. 1 to Dec. 31). For the Fair360 survey definition of New Hires, please see item 2.1 in the Glossary of Terms. |
| **Workforce turnover (voluntary)** | By turnover, we mean the employees who were with the company on the last day of the previous year (Dec. 31) but were no longer with the company on the last day of the current survey year (Dec. 31). Include retirees in the category of Retirement voluntary turnovers; exclude them from Voluntary turnover. For the Fair360 survey definition of Voluntary Turnover, please see item 2.3 in the Glossary of Terms. |
| **Workforce turnovers (involuntary)** | Involuntary turnovers are the turnovers due to firing, lay-offs, etc. Only include those retirees impacted by a mandatory retirement age. For the Fair360 survey definition of Involuntary Turnover, please see item 2.4 in the Glossary of Terms. |
| **Management overall** | All the management/professional employees as defined by your company. This includes management levels 1 through 4 and all other management/professional employees at the lower levels. (See below for the explanation of the management levels.) As a part of workforce, management overall includes only U.S. (including Alaska, Hawaii, Puerto Rico or any other U.S. territories). We often use the terms "management" or "management employees," both of which are synonymous with "management overall." For the Fair360 survey definition of Management Overall, please see item 2.6 in the Glossary of Terms. |
| **Management new hires** | All the new hires into management overall (as defined above) during the survey year (from Jan. 1 to Dec. 31). |
| **Within-management promotions** | Members of management overall who received promotions during the survey year (from Jan. 1 to Dec. 31). They should have been a management member overall before being promoted. For the Fair360 survey definition of Promotions, please see item 2.2 in the Glossary of Terms. |
| **Employees promoted into management** | All U.S. employees who were promoted into management. They should have been non-management employees prior to being promoted and became management employees. Leave these cells blank if your company does not allow this. |
| **Management turnovers (voluntary)** | Voluntary turnovers within management overall. See above, "Workforce turnovers (voluntary)," for the definition of voluntary turnover. |
| **Management turnovers (involuntary)** | Involuntary turnovers within management overall. See above, "Workforce turnovers (involuntary)," for the definition of involuntary turnovers. |

| | |
|---|---|
| **Management level 1** | CEO and his/her direct, non-administrative reports. This is the highest level in management. Sometimes it is shortened to "level 1" or even "lev1." For the Fair360 survey definition of Management Level 1, please see item 2.7 in the Glossary of Terms. |
| **New hires to management level 1** | All new hires into management level 1 during the survey year. This refers to new hires from outside of the company. |
| **Promoted to management level 1** | All new members who were promoted into management level 1 during the survey year. Exclude new hires from outside the Company. |
| **Management level 1 turnovers (voluntary)** | Voluntary turnovers within management level 1. See above, "Workforce turnovers (voluntary)," for the definition of voluntary turnover. |
| **Management level 1 turnovers (involuntary)** | Involuntary turnovers within management level 1. See above, "Workforce turnovers (involuntary)," for the definition of involuntary turnovers. |
| **Management level 2** | One level below management level 1 (non-administrative). For the Fair360 survey definition of Management Level 2, please see item 2.8 in the Glossary of Terms. |
| **New hires to management level 2** | All new hires into management level 2 during the survey year. This refers to new hires from outside of the company. |
| **Promoted to management level 2** | All new members who were promoted into management level 2 during the survey year. Exclude new hires from outside of the company. |
| **Management level 1 turnovers (voluntary)** | Voluntary turnovers within management level 2. See above, "Workforce turnovers (voluntary)," for the definition of voluntary turnover. |
| **Management level 1 turnovers (involuntary)** | Involuntary turnovers within management level 2. See above, "Workforce turnovers (involuntary)," for the definition of involuntary turnovers. |
| **Management level 3** | Two levels below management level 1 (non-administrative). For the Fair360 survey definition of Management Level 3, please see item 2.9 in the Glossary of Terms. |
| **New hires to management level 3** | All new hires into management level 3 during the survey year. This refers to the new hires from outside of the company. |
| **Promoted to management level 3** | All new employees promoted into management level 3 during the survey year. Exclude new hires from outside of the company. |
| **Management level 3 turnovers (voluntary)** | Voluntary turnovers within management level 3. See above, "Workforce turnovers (voluntary)," for the definition of voluntary turnover. |
| **Management level 3 turnovers (involuntary)** | Involuntary turnovers within management level 3. See above, "Workforce turnovers (involuntary)," for the definition of involuntary turnovers. |
| **Management level 4** | Three levels below management level 1 (non-administrative). Notice that level 4 does not have to be the lowest level within management overall. The ladder may include lower levels below level 4. For the Fair360 survey definition of Management Level 4, please see item 2.10 in the Glossary of Terms. |
| **New hires to management level 4** | All new hires into management level 4 during the survey year. This refers to the new hires from outside of the company. |
| **Promoted to management level 4** | All new members who were promoted into management level 4 during the survey year. Exclude new hires from outside of the company. |
| **Management level 4 turnovers (voluntary)** | Voluntary turnovers within management level 4. See above, "Workforce turnovers (voluntary)," for the definition of voluntary turnover. |
| **Management level 4 turnovers (involuntary)** | Involuntary turnovers within management level 4. See above, "Workforce turnovers (involuntary)," for the definition of involuntary turnovers. |

Q18. Provide the gender and ethnicity breakdowns of your total workforce. This includes total hourly workforce, total non-hourly exempt workforce, workforce new hires, and voluntary and involuntary turnovers: *(optional)*

*Note: The total for workforce (women) and workforce (men) should be equal to the number of U.S. employees reported in the previous question. Please include all employees in all U.S. territories. New hires are those who were hired after Dec. 31, the previous year, and were employed during the current calendar year. Turnovers are the employees who were with the companyon the last day of the previous year (Dec. 31) but were no longer with the company on the last day of the current survey year (Dec. 31). Note: Include retirees in the category of Retirement voluntary turnovers; exclude them from Voluntary turnover.*

| Type | Gender | White | Black | Asian | Native Hawaiian / Other Pacific Islander | Native American / Alaskan Native | Latino or Hispanic | Two or More Races / Ethnicities | Other | Unknown | Total |
|------|--------|-------|-------|-------|------|------|------|------|-------|---------|-------|
| *Overall workforce* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Hourly workforce* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Non-hourly exempt workforce* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *New hires* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Promotions* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Involuntary turnover* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |

| | | |
|---|---|---|
| Voluntary turnover *(excluding retirement)* | Women | |
| | Men | |
| | Other | |
| | Unknown | |
| *Retirement voluntary turnover* | Women | |
| | Men | |
| | Other | |
| | Unknown | |

Q19. Provide the gender and ethnicity breakdowns of your management overall, management newhires, non-management employees promoted into management, within-management promotions, and management turnovers (voluntary and involuntary):

*Note: Please enter the number of all the management employees as defined by your company (and as answered previously). This includes entry-level management up to your U.S. CEO. <u>Please include all management employees in all U.S. territories</u>. Management new hires are those who are hired into management after Dec. 31, the previous year, and were active management employees during the current calendar year. The same applies to non-management employees promoted into management. Turnovers are defined as the management employees who were with the company on the last day of the previous year (Dec. 31) but no longer with the company on the last day of the current survey year (Dec. 31). Note: Include retirees in the category of Retirement voluntary turnovers; exclude them from Voluntary turnover.*

| Type | Gender | White | Black | Asian | Native Hawaiian / Other Pacific Islander | Native American / Alaskan Native | Latino or Hispanic | Two or More Races/Ethnicities | Other | Unknown | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| *Overall management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *New hires* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Promotions within management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Promotions into management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Involuntary turnover* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Voluntary turnover (excluding retirement)* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |

| *Retirement voluntary turnover* | Women | |
| --- | --- | --- |
| | Men | |
| | Other | |
| | Unknown | |

Q20. Provide the gender and ethnicity breakdowns of your management level 1, new hires to management level 1 from outside of your company, those who were promoted to this level, and total turnover in this level. **The total formanagement level 1 (women and men) must not exceed 25**.

*Note: Your CEO and your CEO's direct reports are management level 1, which represents the highest level in management. Level 1 does not include administrative people, except for the Chief Administrative Officer, if you have one. Please include employees in this level in all U.S. territories only. Turnovers are defined as those who were with the company on the last day of the previous year (Dec. 31) but no longer with the company on the last day of the current survey year (Dec. 31). Note: Include retirees in the category of Retirement voluntary turnovers; exclude them from Voluntary turnover.*

| Type | Gender | White | Black | Asian | Native Hawaiian / Other Pacific Islander | Native American / Alaskan Native | Latino or Hispanic | Two or More Ethnicities | Other | Unknown | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Total level 1 management | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| New hires to level 1 management | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| Promotions to level 1 management | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| Involuntary turnover level 1 management | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| Voluntary turnover (excluding retirement) level 1 management | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |

| | | |
|---|---|---|
| | Other | |
| | Unknown | |
| *Retirement voluntary turnover level 1 management* | Women | |
| | Men | |
| | Other | |
| | Unknown | |

Q21. Provide the gender and ethnicity breakdowns of your management level 2, new hires tomanagement level 2 from outside of your company, those who were promoted to this level, and total turnover in this level.

*Note: Management level 2 is one level below level 1, or direct reports to your CEO's direct reports. <u>Please include employees in this level in all U.S. territories only</u>. Turnovers are defined as those who were with the company on the last day of the previous year (Dec. 31) but no longer with the company on the last day of the current survey year (Dec. 31). Please ensure turnover numbers are not greater than the workforce numbers for each cohort. Note: Include retirees in the category of Retirement voluntary turnovers; exclude them from Voluntary turnover.*

| Type | Gender | White | Black | Asian | Native Hawaiian / Other Pacific Islander | Native American / Alaskan Native | Latino or Hispanic | Two or More Ethnicities | Other | Unknown | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| *Total level 2 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *New hires to level 2 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Promotions to level 2 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Involuntary turnover level 2 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Voluntary turnover* | Women | | | | | | | | | | |

| | | |
|---|---|---|
| *(excluding retirement)* *level 2 management* | Men | |
| | Other | |
| | Unknown | |
| *Retirement voluntary turnover* *level 2 management* | Women | |
| | Men | |
| | Other | |
| | Unknown | |

Q22. Provide the gender and ethnicity breakdowns of your management level 3, new hires tomanagement level 3 from outside of your company, those who were promoted to this level, and total turnover in this level.

*Note: Management level 3 is two levels below level 1, or direct reports to level 2. <u>Please include employees in this level in all U.S. territories only</u>. Turnovers are defined as those who were with the company on the last day of the previous year (Dec. 31) but no longer with the company on the last day of the current survey year (Dec. 31). <u>Please</u> <u>ensure turnover numbers are not greater than the workforce numbers for each cohort</u>. Note: Include retirees in the category of Retirement voluntary turnovers; exclude them from Voluntary turnover.*

| Type | Gender | White | Black | Asian | Native Hawaiian / Other Pacific Islander | Native American / Alaskan Native | Latino or Hispanic | Two or More Ethnicities | Other | Unknown | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| *Total level 3 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *New hires to level 3 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Promotions to level 3 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Involuntary turnover level 3 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Voluntary turnover* | Women | | | | | | | | | | |

| | | |
|---|---|---|
| *(excluding retirement) level 3 management* | Men | |
| | Other | |
| | Unknown | |
| *Retirement voluntary turnover level 3 management* | Women | |
| | Men | |
| | Other | |
| | Unknown | |

Q23. Provide the gender and ethnicity breakdowns of your management level 4, new hires to management level 4 from outside of your company, those who were promoted to this level, and total turnover in this level.

*Note: Management level 4 is three levels below level 1, or direct reports to level 3. Please include employees in this level in all U.S. territories only. Turnovers are defined as those who were with the company on the last day of the previous year (Dec. 31) but no longer with the company on the last day of the current survey year (Dec. 31). Please ensure turnover numbers are not greater than the workforce numbers for each cohort. Note: Include retirees in the category of Retirement voluntary turnovers; exclude them from Voluntary turnover.*

| *Type* | Gender | White | Black | Asian | Native Hawaiian / Other Pacific Islander | Native American / Alaskan Native | Latino or Hispanic | Two or More Ethnicities | Other | Unknown | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| *Total level 4 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *New hires to level 4 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Promotions to level 4 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Involuntary turnover level 4 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Voluntary turnover* | Women | | | | | | | | | | |

| | | |
|---|---|---|
| *(excluding retirement)* *level 4 management* | Men | |
| | Other | |
| | Unknown | |
| *Retirement voluntary turnover* *level 4 management* | Women | |
| | Men | |
| | Other | |
| | Unknown | |

Q24. Provide a breakdown, in whole numbers, of your Executive HR Council by gender and ethnicity.
*Please type whole numbers (no decimals) into the boxes below. In the event you have more than one Executive HR Council, please aggregate the human capital metrics to reflect representation for all Executive HR Councils.*

| Type | Gender | White | Black | Asian | Native Hawaiian / Other Pacific Islander | Native American / Alaskan Native | Latino or Hispanic | Two or More Races / Ethnicities | Other | Unknown | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| *Executive HR Council* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |

Q25. Please provide the breakdown of the Executive Fairness Council by the following management levels
Note: The gray cell value (total) is automatically calculated.

| | Number of people |
|---|---|
| Level 1 (*CEO and direct reports*) | |
| Level 2 (*One level below level 1*) | |
| Level 3 (*Two levels below level 1*) | |
| Level 4 (*Three levels below level 1*) | |
| Other | |
| Total | |

# Talent Program Metrics – [Q26-Q46]

The following section is designed to collect information on your human capital metrics across talent programs.

**About this section.** In this section, you will be asked to report total counts for intersectionality (gender: female, male; and ethnicity: Black, Asian, Native Hawaiian/other Pacific Islander, Native American/Alaskan Native, Latino or Hispanic, two or more races/ethnicities) for talent programs. *You have the option to report talent program metrics based on your organization's fiscal year rather than the traditional calendar year (Jan. 1 to Dec. 31).*

You may want to consider responding to this section in partnership with your human resources division or any staff who manages data or reporting for talent programs and human capital metrics.

For the Fair360 survey definitions of Mentorship, Formal Mentorship Program, Sponsorship, Sponsor, Formal Sponsorship Program, and Employee Resource Groups (ERGs), please see items 3.1-3.6 in the Glossary of Terms.

**What you will be asked.** Specifically, you will be asked to provide the gender and ethnicity composition for the following categories:

Talent Programs (if applicable)
A.  Mentorship
    (a)  Mentors and mentees in management levels 1-4
    (b)  Mentors and mentees within management
    (c)  Mentors and mentees in the overall workforce
    (d)  Percentage of mentors and mentees by levels of management who received promotions between Dec. 31 of the previous year, and Dec. 31 of the current reporting year.
    (e)  Mentorship success metrics
    (f)  Mentorship introduced during onboarding
B.  Sponsorship
    (a)  Sponsors and sponsored in management levels 1-4
    (b)  Sponsors and sponsored within management
    (c)  Sponsors and sponsored in the overall workforce
    (d)  Percentage of sponsors and sponsored employees by management levels who received promotions between Dec. 31 of the previous year, and Dec. 31 of the current reporting year.
    (e)  Sponsorship success metrics
C.  High potentials
    (a)  Management levels 1-4
    (b)  Overall management
    (c)  Overall workforce
    (d)  Percentage of high potentials by levels of management in mentorship/sponsorship programs
    (e)  Percentage of high potentials by management levels who received promotions between Dec. 31 of the previous year, and Dec. 31 of the current reporting year.
    (f)  High potential identification criteria and success metrics
D.  Employee Resource Groups (ERGs)

(a) Management levels 1- 4
(b) Overall management
(c) Overall workforce
(d) ERG members among employees at corporate headquarters and outside of headquarters
(e) Percentage of ERG members by management levels who received promotions between Dec. 31 of the previous year, and Dec. 31 of the current reporting year.
(f) Percentage of senior leadership (level 1 and 2) who participate as mentors, sponsors and executive sponsors of Employee Resource Groups (ERGs)
(g) ERG groups/subgroups/chapters
(h) ERGs with different purposes and functionality
(i) ERG success metrics

---

Q26. Which of the following ways would you prefer to enter your data?
    A.  Enter it per question onscreen in the Momentive online platform
    B.  Use an Excel template to upload your data form to Momentive

*Note:* You may change your selection at any time by navigating back to this question and selecting the desired response. When you select the "forward" arrow, the appropriate questions and your choice will then display.

You will be asked to complete a series of tables for talent programs and human capital metrics across your workforce, which include a category for "*other"* and *"unknown*" for both ethnicity and gender.

"*Other*" should only be used for instances where the existing categories do not capture the ethnicity or gender that are listed. "*Unknown*" should only be used when an employee chooses not to self-identify (self-ID).

---

[DISPLAY UPLOAD PAGE IF 26 = B]

Please **click here** to download the Talent Programs Excel template. *You can now report your organization's Human Capital and Talent Program Metrics based on your organization's fiscal year rather than the traditional calendar year reporting (January 1 to December 31).*

Q27. Please upload your talent program metrics using the field below. Note: The file must be saved in the .xlsx format. The template is locked, so it cannot be modified. Please do not attempt to modify the template in any way other than to add your data (i.e., do not change formatting, add a formula, etc.).
    B. {Upload field}

---

Q28a. Provide a breakdown of the U.S. *mentors* in yourcompany's mentorship program(s), by gender and ethnicity, in the reporting year:

| Type | Gender | White | Black | Asian | Native Hawaiian / Other Pacific Islander | Native American / Alaskan Native | Latino or Hispanic | Two or More Ethnicities | Other | Unknown | Total |
|------|--------|-------|-------|-------|------------------------------------------|----------------------------------|--------------------|-------------------------|-------|---------|-------|

| | | |
|---|---|---|
| | Women | |
| *Mentors*, *level 1 management* | Men | |
| | Other | |
| | Unknown | |
| | Women | |
| *Mentors*, *level 2 management* | Men | |
| | Other | |
| | Unknown | |
| | Women | |
| *Mentors*, *level 3 management* | Men | |
| | Other | |
| | Unknown | |
| | Women | |
| *Mentors*, *level 4 management* | Men | |
| | Other | |
| | Unknown | |
| | Women | |
| *Mentors*, *overall management* | Men | |
| | Other | |
| | Unknown | |
| | Women | |
| *Mentors*, *overall workforce* | Men | |
| | Other | |
| | Unknown | |

Q29a. Provide a breakdown of the U.S. *mentees* in yourcompany's mentorship program(s), by gender and ethnicity, in the reporting year:

| Type | Gender | White | Black | Asian | Native Hawaiian / Other Pacific Islander | Native American / Alaskan Native | Latino or Hispanic | Two or More Ethnicities | Other | Unknown | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Mentees**, level 1 management | Women Men Other Unknown | | | | | | | | | | |
| **Mentees**, level 2 management | Women Men Other Unknown | | | | | | | | | | |
| **Mentees**, level 3 management | Women Men Other Unknown | | | | | | | | | | |
| **Mentees**, level 4 management | Women Men Other Unknown | | | | | | | | | | |
| **Mentees**, overall management | Women Men Other Unknown | | | | | | | | | | |
| **Mentees**, overall workforce | Women Men Other Unknown | | | | | | | | | | |

Q30. Is mentorship introduced during onboarding for any of the following: (*Select all that apply*)

| |
|---|
| A. Level 1 management |
| B. Level 2 management |
| C. Level 3 management |
| D. Level 4 management |
| E. Overall management |
| F. Overall workforce |

Q30a. Please indicate the percentages of participants in the **formal mentorship program** who received a promotion between Dec. 31 previous year and Dec. 31 current year. For example, if there is a formal track of 100 mentees in your organization's talent program and 10 of them got promoted in the current FY, then the response for part A will be 10/100 (10%).

    A.  Mentors       _____%

    B.  Mentees       _____%

Q31.  Provide a breakdown of the U.S. employee **sponsors** in your company's sponsorship program(s), by gender and ethnicity:

| Type | Gender | White | Black | Asian | Native Hawaiian / Other Pacific Islander | Native American / Alaskan Native | Latino or Hispanic | Two or More Ethnicities | Other | Unknown | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| *Sponsors, level 1 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Sponsors, level 2 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Sponsors, level 3 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Sponsors, level 4 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Sponsors, overall management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |

Q32. Provide a breakdown of the U.S. employees *sponsored* in your company's sponsorship program(s), by gender and ethnicity:

| Type | Gender | White | Black | Asian | Native Hawaiian / Other Pacific Islander | Native American / Alaskan Native | Latino or Hispanic | Two or More Ethnicities | Other | Unknown | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| *Sponsored, level 1 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Sponsored, level 2 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Sponsored, level 3 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Sponsored, level 4 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *Sponsored, overall management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |

Q32f. Please indicate the percentage of participants in the **formal sponsorship program** who received a promotion between Dec. 31 of the previous year, and Dec. 31 of the current year. For example, if there is a formal track of 100 sponsors in your organization's talent program and 10 of them got promoted in the current FY, then the response for part A will be 10/100 (10%).

    A. Sponsors     _____ %
    B. Sponsored     _____ %

Q33a. Provide a breakdown of all U.S. employees in your *High Potential Program*, by gender and ethnicity:

| Type | Gender | White | Black | Asian | Native Hawaiian / Other Pacific Islander | Native American / Alaskan Native | Latino or Hispanic | Two or More Ethnicities | Other | Unknown | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| *High Potentials, level 1 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *High Potentials, level 2 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *High Potentials, level 3 management* | Women | | | | | | | | | | |
| | Men | | | | | | | | | | |
| | Other | | | | | | | | | | |
| | Unknown | | | | | | | | | | |
| *High Potentials,* | Women | | | | | | | | | | |

| | | | |
|---|---|---|---|
| *level 4 management* | Men | | |
| | Other | | |
| | Unknown | | |
| **High Potentials,** *overall management* | Women | | |
| | Men | | |
| | Other | | |
| | Unknown | | |
| **High Potentials,** *overall workforce* | Women | | |
| | Men | | |
| | Other | | |
| | Unknown | | |

Q34. Please indicate the following percentages.

*Note: Enter a number between zero (0.0) and one hundred (100.0). If not applicable or the answer is unknown, leave the input box blank.*

| | Percent |
|---|---|
| Percentage of **high potentials** who have mentors in the **formal mentorship** program (*U.S. employees only*) | |
| Percentage of **high potentials** who have **formal sponsors** (*U.S. employees only*) | |

Q35. Please indicate the percentages of participants in the **formal High Potential programs** who received a promotion in the previous calendar year or your fiscal year. For example, if there is a formal track of 100 high potentials in your organization's talent program in which 10 of them got promoted in the current FY, then the response for part A will be 10/100 (10%).

High potentials _____ %

Q36. What criteria are used toidentify high potentials? (*Select all that apply*)
   A. Strength-based assessments (e.g., talent reviews, 9-box)
   B. Self-identified career and/or leadership aspirations
   C. Selection based on current level/job titles
   D. Capability to perform at one or more higher level(s)
   E. Demonstrated capacity for learning agility
   F. Amount of responsibility candidates take on above their regularly assigned role
   G. Other (please describe) _____
   H. None of the above

Q37. How does your organization measure the success of high potentials? (*Select all that apply*)
   A. Evaluate individual performance goal(s)
   B. Track progress in developmental program(s)
   C. Movement/mobility between levels or sectors of the organization
   D. Promotion rates compared to internal benchmarks, such as all other managers
   E. Organizational retention
   F. Other (*please specify*) _____
   G. We do not measure the success of high potentials

Q38. Does your organization have *Employee Resource Groups(ERGs)*?
   A. Yes
   B. No

Q38b. For which levels of management or workforce (e.g., L1, L2, etc.)?

   _____

Q38c. Tell us how your company defines an *Employee ResourceGroup*.

   _____

Q39a. Provide a breakdown of all U.S. **ERG** members, by gender and ethnicity:

| Type | Gender | White | Black | Asian | Native Hawaiian / Other Pacific Islander | Native American / Alaskan Native | Latino or Hispanic | Two or More Ethnicities | Other | Unknown | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| *Employee resource group, level 1 management members* | Women Men Other Unknown | | | | | | | | | | |
| *Employee resource group, level 2 management members* | Women Men Other Unknown | | | | | | | | | | |
| *Employee resource group, level 3 management members* | Women Men Other Unknown | | | | | | | | | | |
| *Employee resource group, level 4 management members* | Women Men Other Unknown | | | | | | | | | | |
| *Employee resource group, overall management members* | Women Men Other Unknown | | | | | | | | | | |
| *Employee resource group overall workforce members* | Women Men Other Unknown | | | | | | | | | | |

Q40. How many corporate-wide resource groups does yourcompany have in the U.S.?

| A. Number of groups | [Numeric only] |
|---|---|
| B. Number of chapters and sub-groups | [Numeric only] |

Q41.  Please indicate the percentage of employees who are members of *at least* one resource group.
Note: for this question, you need to divide the total number of corporate headquarters employees who ERG members by the total number of corporate headquarters employees (for part A) and the total number of employees outside headquarters who participated in ERGs by the total number of employees outside headquarters (for part B).
*Enter a number between zero (0.0) and one hundred (100.0). If not applicable or the answer is unknown, leave the input box blank.*

|  | Percent |
|---|---|
| A.  % of ERG members among employees at corporate headquarters (that is, headquarter ERG participation rate) | [0-100 only: 1 decimal] |
| B.  % of ERG members among employees *outside* of corporate headquarters (that is, outside headquarter ERG participation rate) | [0-100 only: 1 decimal] |

Q42. Please indicate what percentage of corporate Employee Resource Groups (ERGs) have an executive sponsor in Senior Management Levels 1 & 2.

|  | Level 1 (CEO and Direct reports) & Level 2 (one level below CEO and direct reports) |
|---|---|
| % of Corporate ERGs sponsored by: |  |

Q43.  Please indicate the percentage of participants in **formal ERG programs** who received a promotion prior calendar year or your fiscal year.
        ERG  _____        %

Q44. What Key Performance Indicators (KPIs) do you generally use to measure success across your **formal ERG programs**? (*Select all that apply*)

| A. Employee Resource Groups | Engagement or other employee attitudes such as satisfaction, commitment, etc. | Employee retention | Overall participation | Promotions | Representation | Other | We do not measure success across this program |
|---|---|---|---|---|---|---|---|
|  |  |  |  |  |  |  |  |

Q44B. [DISPLAY IF ANY VALUE FOR 44 = OTHER]  Please describe the other methods used to measure success across the following:

Employee Resource Groups [DISPLAY IF 44 = OTHER] _____

Q45. Is formal ERG membership introduced during onboarding for any of the following: (*Select all that apply*)

| |
|---|
| A. Level 1 management |
| B. Level 2 management |
| C. Level 3 management |
| D. Level 4 management |
| E. Overall management |
| F. Overall workforce |

Q46. *Please indicate how your organization leverages its ERGs.* (Select all that apply)
  A. Acquisition of talent representative of the labor force
  B. Employee onboarding
  C. Communication of Inclusion initiatives
  D. Conducting self-ID campaigns
  E. Internal talent development
  F. Customer engagement (e.g., focus groups on products/services)
  G. Community outreach/engagement/volunteerism
  H. Philanthropic initiatives
  I. Identification of diverse suppliers
  J. Other (please describe) _____

# Talent Acquisition, Development, and Management – [Q47-Q48]

**About this section.** The following section is designed to assess your programs and practices around how you attract talent, what programs you offer to develop talent, and how you manage talent.

You may want to consider responding to this section in partnership with your human resources division or any staff who manages or oversees talent acquisition, development, and management. For the Fair360 survey definition of Talent Acquisition/Recruitment Staff, please see item 2.14 in the Glossary of Terms.

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Q47. Are inclusive interview panels:

| | | | | |
|---|---|---|---|---|
| A. Required for: | Promotions only | New hires only | Both promotions and new hires | No positions |
| B. Optional for: | Promotions only | New hires only | Both promotions and new hires | No positions |

Q48. Does your company have recruiting relationships that target: (*Select all that apply*)
  A. Alaskan Native or Native Hawaiian-Serving Institutions (ANNHIs)
  B. Asian American and Pacific Islander Serving Institutions (AAPISIs)
  C. Community Colleges
  D. Hispanic Serving Institutions (HSIs)
  E. Historically Black Colleges and Universities (HBCUs)
  F. Minority Serving Community Colleges
  G. Native American-Serving Non-Tribal Institutions (NASNTIs)
  H. Predominately Black Institutions (PBIs)
  I. Technical/Trade Schools
  J. Tribal Colleges and Universities (TCUs)
  K. Other (*please specify*)
  L. None of the above

# Review and Submit

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Thank you for completing the Fair360 Workplace Fairness survey!

Now that you have recorded your responses, the next steps require you to finalize these responses by providing a verification letter through Adobe.

[VERIFICATION URL]

[Required response] Follow the verification URL (directly above), have the document **signed by your CEO, CHRO** or other leader not directly responsible for your Workplace Inclusion office. This verification letter ensures that your answers are reviewed and approved either by your CEO or CHRO. Once completed, please hit next. Do not hit next until this step is completed.

Once verified, please click "**Next**" to continue.

Congratulations, you've reached the end of the survey. When you're ready to finalize your responses, please click **"Submit"** below. If you need to make changes to your responses, please go back and do so now.

# Fair360 Glossary of Terms

| Term | Definition |
|---|---|
| 1.1 Fair | Refers to a workplace culture whose talent management practices are representative of all employees, regardless of race, ethnicity, gender, sexual identity, disability or veteran status |
| 1.2 Disadvantaged Groups | Groups that are subject to prejudice, discrimination or biases due to their social status, background and/or other characteristics (e.g., a woman denied a management position because of her gender). |
| 1.3 Multicultural Organization | Refers to organizations that include people from multiple diverse group identities: race/ethnicity, gender, sexual orientation, People with Disabilities, veterans, nationality, class, religion or other groupings. |
| 1.4 North American Industry Classification System (NAICS) | A coding system used by Federal agencies to classify businesses to report on the U.S. business economy. For more information, please refer to: https://www.census.gov/naics/ |
| 2.1 New Hires | Employees in the U.S. (including U.S. territories) hired externally after Dec. 31, previous year and still active employees on Dec. 31, current year. |
| 2.2 Promotions | Employees in the U.S. (including U.S. territories) promoted to a higher position and/or ranking after Dec. 31, previous year and still active employees on Dec. 31, current year. |
| 2.3 Voluntary Turnover | By voluntary turnover, we mean the employees who were with the company on the last day of the previous year (Dec. 31) but no longer with the company on the last day of the current survey year (Dec. 31). Include retirees in the category of Retirement voluntary turnovers; exclude them from Voluntary turnover. |
| 2.4 Involuntary Turnover | Involuntary turnovers are the turnovers due to firing, lay-offs, etc. Only include those retirees impacted by a mandatory retirement age. |
| 2.5 Overall Workforce | Overall Workforce: U.S. workforce including Alaska, Hawaii, Puerto Rico or any other U.S. territories. The workforce includes all employees, both management and non-management. Sometimes we use the term "total workforce," which is synonymous with "workforce."<br><br>Workforce hourly: U.S. workforce paid on an hourly basis for the amount of time spent working, including Alaska, Hawaii, Puerto Rico or any other U.S. territories. The workforce includes all employees, both management and non-management.<br><br>Workforce non-hourly exempt: U.S. workforce who are exempt from hourly and overtime pay, including Alaska, Hawaii, Puerto Rico or any other U.S. territories. The workforce includes all employees, both management and non-management. |

| Term | Definition |
|---|---|
| | Workforce new hires: All the new hires into workforce (as defined above) during the survey year (from Jan. 1 to Dec. 31). |
| | Workforce turnover (voluntary): By turnover, we mean the employees who were with the company on the last day of the previous year (Dec. 31) but no longer with the company on the last day of the current survey year (Dec. 31). Include retirees in the category of Retirement voluntary turnovers; exclude them from Voluntary turnover. |
| | Workforce turnovers (involuntary): Involuntary turnovers are the turnovers due to firing, lay-offs, etc. Only include those retirees impacted by a mandatory retirement age. |
| 2.6 Management Overall | Management overall: All the management/professional employees as defined by your company. This includes management levels 1 through 4 and all other management/professional employees at the lower levels. (See below for the explanation of the management levels.) As a part of workforce, management overall includes only U.S. (including Alaska, Hawaii, Puerto Rico or any other U.S. territories). We often use the terms "management" or "management employees," both of which are synonymous with "management overall." |
| | Management new hires: All the new hires into management overall (as defined above) during the survey year (from Jan. 1 to Dec. 31). |
| | Within-management promotions: Members of management overall who received promotions during the survey year (from Jan. 1 to Dec. 31). They should have already been a member of management overall prior to being promoted. |
| | Employees promoted into management: All U.S. employees who were promoted into management. They should have been non-management employees prior to being promoted and became management employees. Leave these cells blank if your company does not allow this. |
| | Management turnovers (voluntary): Voluntary turnovers within management overall. See above, "Workforce turnovers (voluntary)," for the definition of voluntary turnover. |
| | Management turnovers (involuntary): Involuntary turnovers within management overall. See above, "Workforce turnovers (involuntary)," for the definition of involuntary turnovers. |
| 2.7 Management Level 1 | Management level 1: CEO and their direct, non-administrative reports. This is the highest level in management. Sometimes it is shortened to "level 1" or even "lev1." |
| | New hires to management level 1: All new hires into management level 1 during the survey year. This refers to new hires from outside of the company. |
| | Promoted to management level 1: All new members who were |

| Term | Definition |
|---|---|
| 2.8 Management Level 2 | promoted into management level 1 during the survey year. Exclude new hires from outside the<br><br>Company.<br><br>Management level 1 turnovers (voluntary): Voluntary turnovers within management overall. See above, "Workforce turnovers (voluntary)," for the definition of voluntary turnover.<br><br>Management turnovers (involuntary): Involuntary turnovers within management level 1. See above, "Workforce turnovers (involuntary)," for the definition of involuntary turnovers.<br><br>Management level 2: One level below management level 1 (non-administrative).<br><br>New hires to management level 2: All new hires into management level 2 during the survey year. This refers to new hires from outside of the company.<br><br>Promoted to management level 2: All new members who were promoted into management level 2 during the survey year. Exclude new hires from outside of the company.<br><br>Management level 2 turnovers (voluntary): Voluntary turnovers within management overall. See above, "Workforce turnovers (voluntary)," for the definition of voluntary turnover.<br><br>Management turnovers (involuntary): Involuntary turnovers within management level 2. See above, "Workforce turnovers (involuntary)," for the definition of involuntary turnovers. |
| 2.9 Management Level 3 | Management level 3: Two levels below management level 1 (non-administrative).<br><br>New hires to management level 3: All new hires into management level 3 during the survey year. This refers to the new hires from outside of the company.<br><br>Promoted to management level 3: All new employees promoted into management level 3 during the survey year. Exclude new hires from outside of the company.<br><br>Management level 3 turnovers (voluntary): Voluntary turnovers within management overall. See above, "Workforce turnovers (voluntary)," for the definition of voluntary turnover.<br><br>Management turnovers (involuntary): Involuntary turnovers within management level 3. See above, "Workforce turnovers (involuntary)," for the definition of involuntary turnovers. |
| 2.10 Management Level 4 | Management level 4: three levels below management level 1 (non-administrative).<br><br>New hires to management level 4: All new hires into management level 4 during the survey year. This refers to the new hires from |

| Term | Definition |
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| | outside of the company. |
| | Promoted to management level 4: All new employees promoted into management level 4 during the survey year. Exclude new hires from outside of the company. |
| | Management level 4 turnovers (voluntary): Voluntary turnovers within management overall. See above, "Workforce turnovers (voluntary)," for the definition of voluntary turnover. |
| | Management turnovers (involuntary): Involuntary turnovers within management level 4. See above, "Workforce turnovers (involuntary)," for the definition of involuntary turnovers. |
| 2.11 Senior Leadership | Your CEO (or U.S. lead) and direct reports as well as their direct reports (management levels 1 & level 2). |
| 2.12 Board of Directors | U.S. Board of Directors. Use global board if you do not have a U.S. one. If you do not have a Board, please enter zeros in corresponding fields. |
| 2.13 Executive HR Council | The internal Council, which is comprised of high-level leaders or management levels 1 through 4 only. (See below Executive HR Council/Human resources staff for the explanation of the management levels.) If you do not have an Executive HR Council, please enter zeros in corresponding fields. |
| 2.14 Talent Acquisition/Recruitm ent Staff | U.S. employees who are part of your company's Human Resources division. |
| 3.1 Mentorship | Refers to helping a person grow personally and professionally by providing them advice, feedback and coaching. |
| 3.2 Formal Mentorship Program | A company-sanctioned and company-run program that pairs mentors and mentees, tracks participation and assesses/measures the success of participant and program outcomes. |
| 3.3 Sponsorship | The process of a person with authority, who actively uses their influence to help employees advance in the company. |
| 3.4 Sponsor | Usually, someone at a more senior level and/or an individual with strong influence within an organization assists high potentials in gaining visibility for particular assignments, promotions or positions. |
| 3.5 Formal Sponsorship Program | A company-sanctioned and company-run program that pairs sponsors with identified talent, tracks participation and assesses/measures the success of participant and program outcomes. |
| 3.6 Employee Resource Groups (ERGs) | Internal networks within your organization that promote an inclusive workplace. |
| 3.7 Affinity Groups | A type of employee resource group that is organized based on a common interest/goal or to fulfill a specific purpose. |

| Term | Definition |
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| 4.1 Inclusive Workplace | A work environment aimed at welcoming and providing equal treatment to employees from different backgrounds. |
| 4.2 Talent Reviews | A process to review an employee's current (or past) performance, potential, development opportunities and career mobility within an organization. Could also include individuals identified as part of succession planning efforts. |