SWE A4E Program Participant Instructions

Contents

I. SWE A4E Overview

Advocates for Empowerment (A4E) is a gender parity and equality benchmarking program offered annually by the Society of Women Engineers (SWE) to achieve four main objectives:

- Provide organizations with actionable information and assistance to recruit and retain diverse women in engineering and technology positions as well as advance them into top management.
- Determine best and promising practices to achieve and maintain parity and equality in the workforce.
- Assess how diverse women in engineering and technology positions are doing in the workforce.
- Identify areas for more in-depth research on diverse women in engineering and technology.

SWE A4E uses rigorous methodology to analyze data from participating organizations in three key categories to identify the best employers, and provide women and organizations with valuable insights:

- Representation of Diverse Women in the Workforce
- Programs, Policies & Practices to Retain and Advance Diverse Women in the Workforce
- Corporate Culture that is Inclusive and Supportive of Diverse Women in the Workforce

All participating organizations will be recognized, not just those with high scores. Every organization that participates in the program will receive two findings reports: 1) confidential report on their individual results compared to benchmarks from all participating organizations, and 2) findings report on the aggregated results of all participating organizations.

A. DEI&B Statement

SWE respects that gender is a continuum. A4E is currently collecting data on individuals who identify as "men" and "women." SWE understands expanding and enhancing our data collection will help enrich data collected on gender parity. We are committed to expanding these categories in the future.

II. Key Dates

The dates listed below are for planning purposes only and are subject to change. Please check Frequently Asked Questions (FAQs) on the SWE A4E website for an updated timeline.

- January 2, 2024: Registration opens.
- April 1, 2024: Application opens (registered organizations are given access).
- June 15, 2024: Registration closes.
- July 1, 2024: Application closes.
- October 1, 2024: Participants are notified of their results.

III. Steps to Submit Your Application

1. Determine your organization's eligibility to participate in SWE A4E (See Section IV: Eligibility Requirements).
2. If eligible to participate, complete the online registration form on the A4E website. SWE Strategic Partnerships will contact you after you submit your registration with the required Non-Disclosure Agreement.
3. Gather your organization's data for the prior year January 1, 2023 to December 31, 2023. You will need to map your organization's job codes to specific positions and levels in order to submit your data (See Sections VIII: Key Definitions, IX: Data Period and Appendix: List of Required Data for the Application).
4. Enter your organization's data into the online application. You will receive an email from SWE A4E with the link if SWE has a signed Non-Disclosure Agreement on file. The application will open on April 1, 2024.

5. Finalize and submit your organization's application by July 1, 2024 at 11:59 PM Pacific Time

IV. Eligibility Requirements

Organizations must meet the following requirements to participate in SWE A4E:
- Privately held or publicly traded company in any industry with the following characteristics:
    — Privately held or publicly traded company in any industry.
    — For-profit.
    — Headquartered in the U.S. (or a significant U.S.-based workforce)
    — Full-time U.S.-based employees:
        ▪ 150 or more full-time U.S.-based employees.
        ▪ At least 25 women in engineering positions and 25 women in technology positions at each level below Executive:
            • Senior Level
            • Mid-level
            • Professional
- Registration completed by June 15, 2024, including a signed SWE A4E Non-Disclosure Agreement.
- Application completed by July 1, 2024, including all requested data provided. NOTE: All data is not required to participate in the program, but there are some minimum data requirements to be able to submit the application.

SWE A4E's eligibility requirements were established to help ensure that: (1) participating organizations are committed to retaining and advancing diverse women in engineering and technology, and (2) the performance results, benchmarks, best practices, and insights generated are valid, comparable, and valuable.

V. Participation Benefits, Packages and Fees

SWE A4E is designed to benefit your organization by providing:

- Actionable performance information to make your workplace better for diverse women in engineering and technology and to achieve gender parity and equality:
    — Assess performance over time and against other organizations with meaningful metrics and benchmarks.
    — Drive best and leading programs, policies and practices and targeted interventions.
    — Continuously improve performance.
- Promotion of your organization as a workplace that cares about supporting and advancing diverse women in engineering and technology:
    — Receive validation that your organization is strategically focused on addressing diversity, equity, includion, and belonging, from the world's largest association of women engineers.
    — Increase recruitment and retention of diverse women in engineering and technology.
- Brand awareness that shows that your organization cares about and values diversity in engineering and technology:
    — Demonstrate commitment to transparency, achieving gender parity and equality, and being an employer of choice.
    — Showcase your strategies and progress.
    — Make it a key part of your marketing strategy.

VI. Recognitions

Because SWE A4E is focused on providing positive recognition to effect change, participating organizations will be listed alphabetically (not by score). The SWE A4E list of participating organizations will be publicly announced and promoted in news releases to the national press and to SWE's 40,000+ members and stakeholders through its multiple media outlets, including:

- Posts on SWE's social media sites:

- — [Blog (All Together)](#)
- — [Facebook](#)
- — [Twitter (@SWEtalk)](#)
- — [LinkedIn](#)
- — [YouTube](#)
- ▪ *[SWE Magazine](#)* articles.

SWE A4E participating organizations will also receive a digital award logo to promote their commitment to equity and be acknowledged at the SWE annual conference with a nametag ribbon and career booth signage.

VII. Methodology & Scoring

An online application hosted by Qualtrics will be used to gather and score organizational data provided by participating organizations. It includes two weighted categories of questions totaling 100 points:

- ▪ Representation of Diverse Women in the Workforce – 60 points
- ▪ Programs, Policies & Practices to Retain and Advance Diverse Women in the Workforce – 40 points

There is also a third, non-weighted category of questions - Corporate Culture. The number of questions in the application varies from a minimum of 86 to a maximum of 234 based on the responses provided.

SWE A4E uses a wide range of criteria within the three categories and 14 sections to: (1) benchmark strategic and human capital programs, policies and practices of organizations and their outcomes on women in engineering and technology positions, and (2) connect outcomes of the top performing organizations to best, promising and emerging practices. The sections include questions on topics that research suggests are critical to retaining and advancing more diverse women in the workforce including commitment by top management, communications and training, pay and benefits, work/life balance options, career development opportunities, employee protections, accountability, and transparency.

All participating organizations will be publicly recognized by SWE A4E and listed alphabetically on the [SWE website](#), not by score.

VIII. Key Definitions

Below are the definitions that your organization will need to answer the questions in the online SWE A4E registration and application. They may also be found by placing your cursor on the question and response options in both questionnaires.

B. Organizational Levels

SWE A4E gathers data on each participating organization's board of directors and U.S.-based employees across six organizational levels, four in top management and three in the corporate/talent pipeline. We recommend that organizations map their job codes to the specified levels and positions before beginning the SWE A4E application.

- **Top Management:**
  - — Members of an organization's board of directors.
  - — Employees in the top three levels of the organization's workforce:
    - ✓ (L1) **C-Suite** - CEO and her/his other direct reports, responsible for the organization's operations and profitability.
    - ✓ (L2) **Senior Vice Presidents** - Senior leaders of the organization with significant business unit or functional oversight that are not members of the C-Suite.
    - ✓ (L3) **Executives** (Vice Presidents) - Leaders of the organization who report directly to Senior Vice Presidents.

- **Corporate/Talent Pipeline:** (Employees in the three levels below Executive.)
    - ✓ (L4) **Senior Level** (Senior Managers & Directors) - Seasoned managers with responsibility for multiple teams and discrete functions or operating units.
    - ✓ (L5) **Mid-Level** (Managers) - Employees who have management responsibility over a store, team, or project.
    - ✓ (L6) **Professional** – Entry-level employees and individual contributors who carry out discrete tasks and participate on teams, typically in an office or corporate setting.

C. Engineering and Technology Positions

Data on employees in engineering and technology positions is only requested for the Corporate/Talent Pipeline (L4 – L6). It is assumed that the background of employees is not tracked by organizations once they become Executives (L3). SWE A4E defines employees in engineering and technology by position not department or educational background based on U.S. Bureau of Labor Statistics designations.

- **Engineering Positions**
    - Management:
        - ✓ **Architectural and engineering managers** - Employees who plan, direct, and coordinate activities in the fields of architecture and engineering.
        - ✓ **Construction managers** - Employees who plan, coordinate, budget, and supervise construction projects from start to finish.
        - ✓ **Industrial production managers** - Employees who oversee the daily operations of manufacturing and related plants.
    - Engineers:
        - ✓ **Aerospace engineers** - Employees who design, develop, and test aircraft, spacecraft, satellites, and missiles.
        - ✓ **Agricultural engineers** - Employees who solve problems concerning power supplies, machine efficiency, the use of structures and facilities, pollution and environmental issues, and the storage and processing of agricultural products.
        - ✓ **Bioengineers and biomedical engineers** - Employees who combine engineering principles with sciences to design and create equipment, devices, computer systems, and software.
        - ✓ **Chemical engineers** - Employees who apply the principles of chemistry, physics, and engineering to design equipment and processes for manufacturing products such as gasoline, detergents, and paper.
        - ✓ **Civil engineers** - Employees who plan, design, and supervise the construction and maintenance of building and infrastructure projects.
        - ✓ **Computer hardware engineers** - Employees who research, design, develop, and test computer systems and components.
        - ✓ **Electrical and electronics engineers** - Employees who design, develop, test, and supervise the manufacture of electrical equipment.
        - ✓ **Environmental engineers** - Employees who use engineering disciplines in developing solutions to problems of planetary health.
        - ✓ **Health and Safety Engineers** – Employees who combine knowledge of engineering and of health and safety to develop procedures and design systems to protect people from illness and injury and property from damage.
        - ✓ **Industrial engineers** - Employees who devise efficient systems that integrate workers, machines, materials, information, and energy to make a product or provide a service.
        - ✓ **Marine engineers and naval architects** - Employees who design, build, and maintain ships, from aircraft carriers to submarines and from sailboats to tankers.
        - ✓ **Materials engineers** - Employees who develop, process, and test materials used to create a wide range of products.
        - ✓ **Mechanical engineers** - Employees who design, develop, build, and test mechanical and thermal sensors and devices.

- ✓ **Mining and geological engineers** - Employees who design mines to safely and efficiently remove minerals for use in manufacturing and utilities.
- ✓ **Nuclear engineers** - Employees who research and develop projects or address problems concerning the release, control, and use of nuclear energy and nuclear waste disposal.
- ✓ **Petroleum engineers** - Employees who design and develop methods for extracting oil and gas from deposits below the Earth's surface.
- ✓ **Software engineers** - Employees who apply the principles of software engineering to the design, development, maintenance, testing, and evaluation of computer software.
- — **Drafters**: Employees who use software to convert the designs of engineers the designs of engineers and architects into technical drawings.
- **Technology Positions**
  - — Management:
    - ✓ **Computer and information systems managers** - Employees who plan, coordinate, and direct computer-related activities in an organization.
  - — Computer occupations:
    - ✓ **Computer and information research scientists** - Employees who design uses for new and existing computing technology.
    - ✓ **Computer network architects** - Employees who design and build data communication networks, including local area networks (LANs), wide area networks (WANs), and Intranets.
    - ✓ **Computer Programmers** - Employees who write, modify, and test code and scripts that allow computer software and applications to function properly.
    - ✓ **Computer support specialists** - Employees who maintain computer networks and provide technical help to computer users.
    - ✓ **Computer systems analysts** - Employees who study an organization's current computer systems and design ways to improve efficiency.
    - ✓ **Database administrators and architects** - Employees who use create or organize systems to store and secure data.
    - ✓ **Information security analysts** - Employees who plan and carry out security measures to protect an organization's computer networks and systems.
    - ✓ **Network and computer systems administrators** - Employees who install, configure, and maintain organizations' computer networks and systems.
    - ✓ **Software developers** - Employees who design computer applications or programs.
    - ✓ **Quality assurance analysts and testers** - Employees who identify problems with applications or programs and report defects.
    - ✓ **Web developers** - Employees who create and maintain websites.
    - ✓ **Digital designers** - Employees who develop, create, and test website or interface layout, functions, and navigation for usability.
  - — **Data scientists** - Employees who use analytical tools and techniques to extract meaningful insights from data.
  - — Engineering technologists and technicians:
    - ✓ **Aerospace engineering and operations technologists and technicians** - Employees who run and maintain equipment used to develop, text, produce, and sustain aircraft and spacecraft.
    - ✓ **Civil engineering technologists and technicians** - Employees who help civil engineers plan, design, and build infrastructure and development projects.
    - ✓ **Electrical and electronic engineering technologists and technicians** – Employees who help engineers design and develop equipment that is powered by electricity or electric current.
    - ✓ **Electro-mechanical and mechatronics technologists and technicians** - Employees who operate, test, and maintain electromechanical or robotic equipment.
    - ✓ **Environmental engineering technologists and technicians** - Employees who implement the plans that environmental engineers develop.

       ✓ **Industrial engineering technologists and technicians** - Employees who help engineers solve problems affecting manufacturing layout or production.

       ✓ **Mechanical engineering technologists and technicians** - Employees who help mechanical engineers design, develop, test, and manufacture machines and other devices.

D. Other Terms & Metrics

- **Anytime, Anywhere Work Model/Schedule** - Work model/schedule that requires employees to be responsive 24 hours a day, 7 days a week and to travel or be relocated anywhere at any time.
- **Compensation** - Base salary, wages, incentives and/or commission.
- **Diversity and Inclusion** - The organization's mission, strategies, and practices value and support a diversity of opinions and backgrounds in workplace and leverage the effects of diversity to achieve a competitive business advantage.
- **Diversity Task Force** - An advisory board comprised of employees and/or external experts who lead, advocate, coordinate, inform, and/or monitor the organization's diversity and inclusion efforts.
- **Employee Net Promoter Score (eNPS)** – A measure of how likely an organization's employees are to recommend it as a place to work.

  Calculation: **eNPS = [(Number of Promoters – Number of Detractors) / Total Respondents]**
- **Employee Resource Group (ERG) -** Voluntary, employee-led group whose aim is to foster a diverse, inclusive workplace aligned with the organization's goals and objectives. Their participants share a characteristic including gender, ethnicity, religious affiliation, lifestyle, or interest. They are also known as ERGs, Affinity Groups, and Business Network Groups).
- **Employees** - People who work for the organization, not including contractors and freelancers.
  - **Full-time Employees** - Employees who work more than 40 hours per week.
  - **Part-time Employees** - Employees who work less than 40 hours per week.

  Calculation: **Average Number of Employees** = (Total number of employees on the first day of the 12-month period + Total number of Employees on the last day of the 12-month period) / 2
- **Flextime** – A flexible work schedule that allows employees to alter the starting and/or end time of her/his workday. Employees still work the same number of scheduled hours as they would under a traditional schedule (9am – 5 pm, Monday – Friday).
- **Formal Programs** - Programs that are organized, sanctioned, and tracked by the organization, and have both a budget and a staff.
  - **Career Mentorship** - Program to expand the abilities of employees to perform well in leadership roles
  - **Career Reentry** - A mid-career return to work program for people who have left the workforce for an extended period of time.
  - **Career Sponsorship** - Program that pairs leaders (sponsors) with employees for the expressed purpose of helping the employees advance in their careers.
  - **Diversity Management** – Integration of an organization's efforts to create and maintain a diverse, inclusive culture and equitable workplace.
  - **High-Potential** - Program to identify and prepare employees for future roles in top management.
  - **Leadership Development** - Program to expand the abilities of employees to perform well in leadership roles.
  - **Replacement/Succession Planning** - Program to identify and possibly groom specific employees to fill positions for the short- or long-term when positions become open.

- — **Succession Management** - Integration of an organization's HR programs, policies and practices to identify, develop and select employees for top management positions.
- — **Talent Management** - Integration of an organization's HR programs, practices and policies to hire, retain and promote employees.
- **Gender Balance** - Both women and men are represented in relatively equal numbers.
- **Gender Diversity** - Both women and men are represented.
- **Gender Equality** - Women and men have the same opportunities, rights, opportunities to choose, and material conditions while respecting their specificities.
- **Gender Equity** - Actions are taken to level the playing field Because women face career barriers that men do not.
- **Gender Inclusive Culture** - The organization's culture must value and support both women and men equally in the workplace.
- **Gender Parity** - Women and men are represented equally.
- **Gender Pay Equity** – Equal pay for women and men in similar jobs/positions.
- **Gender Pay Gap** - Average difference between the remuneration for men and women employees in cents per U.S. dollar.

    Calculation: **Average Gender Pay Gap** = [1-(Average Wage of All Full-Time Women Employees / Average Wage of All Full-time Men Employees)]

- **Incentive Pay** – Compensation paid to employees for achieving or surpassing targeted performance levels (e.g., performance bonuses, profit-sharing and retention bonuses).
- **Initiatives** - Documented projects outside of day-to-day activities with designated people, dates and budgets approved by management to achieve specific goals and objectives.
- **Metric** – Documented system or standard of measurement.
- **Multinational Responsibilities** – Responsibilities that include sales, marketing, operations, programs or initiatives in other countries or global management of the organization.
- **Profit-and-Loss Responsibilities** – Responsibilities that include overseeing the cash flow and profit margin for a program, initiative, department, or the whole organization as well as advising on the budget allocations.
- **Promotion** – Advancement of an employee from one job position to another job position in an organization that has a higher salary, a higher-level job title, and often, more and higher-level job responsibilities.

    Calculation: **Promotion Rate** = (Total Number of Promotions in a 12-Month Period) / (Total Number of Employees in a 12-Month Period)

- **Strategic Objectives** – Statements in an organization's strategy that indicate what it intends to achieve by a specified date in the future.
- **Strategy** – Documented plan for how an organization plans to achieve its mission (why it exits) and vision (where it wants to be at a specified date in the future).
- **Target** – Documented numeric value/threshold that an organization intends to achieve for a specific metric.
- **Tenure** – Measure of the length of time a person has been employed by an organization.

    Calculation: **Average Tenure** = Average Number of Months All Regular Full- and Part-time Employees During a 12 Month Period Have been Employed at an Organization/ 12

- **Turnover** – Measure of the rate at which employees enter and leave (voluntarily and involuntarily) an organization during a given 12-month period.

    Calculation: **Turnover Rate** = Number of Employees Who Left an Organization During a 12-Month Period / Average Number of Employees During the 12-Month Period

- **Work/Life Balance** - Lack of opposition between work and other life roles. It is achieved when the demands of personal life, professional life, and family life are equal.

IX. Data Period

The data requested by SWE A4E includes information on your organization as of December 31, 2023 as well as yearly totals and averages for the prior 12-month period (January 1, 2023 to December 31, 2023). When submitting your organization's data, please pay attention to the metric definitions as well. They may also indicate the data period needed.

X. Resource Estimates to Submit Your Application

SWE A4E estimates that the application will take your organization 8-12 hours to complete the first year (6-10 hours to gather the data and 2 hours to enter it into the application). The time and resources required to submit the application in subsequent years should be significantly reduced after your organization has initially sourced and formatted the data. While other programs may take less time and effort to complete, they may not provide your organization with the comprehensive benchmarks, best practices, and insights that SWE A4E will.

We recommend that one person from your organization's HR or strategy department be designated to oversee the SWE A4E submission process. Ideally, that person will be familiar with your organization's diversity and inclusion efforts and have experience with providing data to research studies or recognition programs and with coordinating data collection across the organization. Departments and resources that may need to provide data include:

- Data Analytics
- Diversity and Inclusion
- Finance
- Governance
- HR

- Internal Consulting/Project Management
- Legal
- Offices of the CEO and Board of Directors
- Strategy

XI. Data Confidentiality and Security

Reasonable steps will be taken by SWE to maintain data confidentiality and security as described in the SWE A4E Non-Disclosure Agreement. Data provided by participants will be anonymized and aggregated. Organization and benchmarking data will not be shared nor linked to organization identifiers either publicly or in the confidential individual organization reports provided to participants. Moreover, SWE will only release individual organization reports to contacts designated by the organizations and will notify each organization of its results prior to publicly recognizing the list of participating organizations.

The online SWE A4E Registration and Application are hosted by Qualtrics. Qualtrics' Security Statement is as follows:

> Qualtrics' most important concern is the protection and reliability of customer data. Our servers are protected by high-end firewall systems and scans are performed regularly to ensure that any vulnerabilities are quickly found and patched. Application penetration tests are performed annually by an independent third-party. All services have quick failover points and redundant hardware, with backups performed daily.
>
> Access to systems is restricted to specific individuals who have a need-to-know such information and who are bound by confidentiality obligations. Access is monitored and audited for compliance.
>
> Qualtrics uses Transport Layer Security (TLS) encryption (also known as HTTPS) for all transmitted data. Surveys may be protected with passwords. Our services are hosted by trusted data centers that are independently audited using the industry standard SSAE-18 method.

Qualtrics obtained a SOC 2 Type II report for the trust principles of Security, Availability, and Confidentiality. The report can be provided by Qualtrics upon request. Qualtrics achieved ISO 27001, 27017, and 27018 certifications. A copy of the certificates can be provided upon request.

Qualtrics is FedRamp Authorized. FedRAMP is the standard of U.S. government security compliance, with over 300 controls based on the highly-regarded NIST 800-53 that requires constant monitoring and periodic independent assessments. More information is found at https://www.fedramp.gov.

XII. Additional Resources and Support

Additional resources to complete the registration and application are available on the SWE A4E website:

- Frequently Asked Questions (FAQs)
- Recordings from a virtual information session are available on the A4E website. Find links to recordings on specific areas of interest on the FAQs page.

Please contact us if you have any questions or need more information about SWE A4E:

- Organizations interested in participating.
- Registered participants.

Appendix: List of Required Data for the Application

Below is the data that your organization will need to answer the questions in the online SWE A4E application. It may require your organization to reformat existing data or generate new data.

A. Representation of Diverse Women

1. Top Management & Workforce Demographics
- Top Management:
  - Board of Directors
    - Number of directors by demographics (EE0-1 categories).
    - Gender of directors in leadership positions:
      - ✓ Board Chair and Presiding Director (since the organization was founded and current)
      - ✓ Committee Chairs by committee (current)
  - Employees:
    - Number of employees by full- and part-time status, gender and level.
    - Average number of employees during the year by gender and level.
    - Number of employees by demographics (EEO-1) and level.
    - Gender of key members:
      - ✓ CEO (since the organization was founded and current)
      - ✓ Other C-Suite members by title (current)
      - ✓ Heads of business units or divisions (current)
    - Other positions/titles held by the CEO.
- Workforce:
  - All employees – Number of employees by full- and part-time status, gender and level.
  - Employees in Engineering Positions:
    - Number of employees by full- and part-time status, gender and level.
    - Average number of employees during the year by gender and level.
    - Number of employees by demographics (EEO-1) and level.
    - Number of employees by gender and type of position.
    - Number of non-US based employees by gender and level.
  - Employees in Technology Positions:
    - Number of employees by full- and part-time status, gender and level.
    - Average number of employees during the year by gender and level.
    - Number of employees by demographics (EEO-1) and level.
    - Number of employees by gender and type of position.
    - Number of non-US based employees by gender and level.

2. Hiring, Retention, Promotion & Career Development Opportunities
- Hiring - Number of people appointed or hired during the year by gender, position (Top Management, Engineering, Technology) and level.
- Performance Appraisal/Evaluation System:
  - Number of top 10% rated/ranked employees by gender and position (Top Management, Engineering, Technology).
  - Percentage of women that fall into in each performance quartile (top, upper middle, lower middle and lower) of full-time employees by position (Top Management, Engineering, Technology).
- Promotions: Number of promotions given during the year by gender and level.
- Turnover: Number of employees that left the organization during the year by gender and level.

- Formal HR Programs to Identify and Develop Talent - Number of employees who participate in each by gender and level.
- Responsibilities:
  - Number of employees with profit-and-loss responsibility by gender and position (Top Management, Engineering, Technology).
  - Number of employees with multinational responsibilities by gender and position (Top Management, Engineering, Technology).
- Technical Career Ladder/Path – Number of employees who are on a technical career path by gender and position (Engineering, Technology).
- Tenure: Average tenure of employees by gender and level (years).

3. Compensation
- Number of top 10% compensated employees by gender and position (Top Management, Engineering, Technology).
- Average gender pay-gap of employees by position (Top Management, Engineering, Technology).
- Percentage of women that fall into each pay quartile (top, upper middle, lower middle and lower) of full-time employees by position (Top Management, Engineering, Technology).

B. Programs, Policies & Practices
1. Top Management Commitment
- Formal diversity management program – Degree of alignment with the corporate strategy.
- Chief Diversity Officer (CDO):
  - Tasked with advancing women in the workforce.
  - Length of time the organization has had the position (years.)
  - Dedicated role or other titles if not.
  - To whom the CDO reports.
  - Number and responsibilities of full- and part-time staff members.
- Diversity council/task force:
  - Person who chairs it (title).
  - Length of time the organization has had the task force (years).
  - Number of members by gender and level.
- Diversity managers – Numbers of employees in the position by gender.
- Data on how women are doing at the organization:
  - Types of data regularly gathered and analyzed.
  - Frequency that the data is reviewed by members of top management
- Strategic objectives) to advance diverse women in the organization's workforce:
  - Main goal.
  - Organizational level at which it is set.
  - Importance to the organization's mission and vision.
  - Length of time the organization has had the objective (years).
  - How far down into the organization the objective is cascaded.
  - Person responsible for overseeing/championing it (title).
  - Frequency of the performance assessment.
  - Components of the performance assessment.
  - Metric(s) used to assess the level of performance.
  - Frequency and components of strategy review meetings.
  - Process to ensure action items are completed on time.
- Initiative(s) to advance diverse women in the organization's workforce:
  - Main goal.

- Organizational level that it is set.
- Degree of alignment with the strategic objective to advance women.
- Length of time the organization has had the initiative (years).
- Existence of a formal project management process in place to manage it.
- Person responsible for overseeing/championing it (title).
- Existence of a change team/champions network to help promote and support it.
- Number of members by gender and level on the change team.
- Degree to which it is fully funded.
- Total budget ($).
- How success of the goal is assessed.
- Metric(s) used to assess the level of performance.

2. Communications & Training

- Formal communications on the advancement of diverse women in the organization:
  - What is communicated (messages).
  - To whom it is communicated (board and levels of employees).
  - How it is communicated (methods).
  - Who communicates it (messengers).
  - Frequency of communications.
- Formal training programs to support the advancement of diverse women at the organization:
  - Programs offered and for each:
    — Length of the initial/onboarding program (hours).
    — Time period that the initial/onboarding program is delivered (days)
    — Required participants.
    — Frequency that its required to be taken by level.
    — Average number of training hours received by board directors, and employees by gender and level.
  - Action(s) taken to minimize gender bias and discrimination and maximize the effectiveness of the programs for women employees.
  - Practice(s) utilized to minimize gender bias and discrimination and maximize the effectiveness of the programs for women employees.
  - Metric(s) to assess the effectiveness of the programs to advance women.

3. Pay & Benefits

- Gender Pay Equity:
  - Existence of a policy requiring it.
  - Frequency of required reviews/audits.
  - Length of time since the last review/audit (months).
  - Existence of a pay-gap by level (Top Management, Engineering Positions, Technology Positions) and action taken to close it.
- Incentive Pay – Eligibility by full- and part-time status and position (Engineering, Technology).
- Benefits:
  - Types offered to employees working more than 20 hours per week.
  - If 80% of employees (Engineering, Technology) have access to on-site lactation rooms.
- Action(s) taken to minimize gender bias and discrimination and maximize the effectiveness of the pay and benefits for women employees.
- Practice(s) utilized to minimize gender bias and discrimination and maximize the effectiveness of pay and benefits for women employees.
- Metric(s) to assess the effectiveness of pay and benefits to advance women.

4. Work/Life Balance
- Work/Life Balance:
  - Options offered including aspects of flextime and if 80% of employees (Engineering, Technology) can control their work start times and location.
  - Action(s) taken to prevent the career derailment of women employees who use them and to maximize their effectiveness for women employees.
  - Practice(s) utilized to prevent the career derailment of women employees who use an option.
  - Metric(s) utilized to assess their effectiveness for women employees.
- Formal Reentry Program:
  - Length of the program by level (weeks).
  - Action(s) taken to minimize gender bias and discrimination and maximize its effectiveness for women employees
  - Practice(s) utilized to minimize gender bias and discrimination and maximize its effectiveness for women employees.
  - Metric(s) utilized to assess its effectiveness for women employee.

5. Hiring, Promotion & Career Development
- Formal talent and succession management programs:
  - Degree of integration with each other and diversity management.
  - Degree of alignment with the corporate strategy.
- Written policy or commitment statement to retain diverse groups of employees and advance them to top management positions – Existence and groups included.
- How the organization determines if employees in engineering and technology positions at the Professional level will have a management or technical career ladder/path.
- Formal management identification and development programs:
  - Which if any have been designed or modified to address the needs of women employees.
  - How employees are selected to participate in each.
  - Action(s) taken to minimize gender bias and discrimination and maximize the effectiveness of the program(s) for women employees.
  - Practice(s) utilized to reduce gender bias and discrimination in the program(s) for women employees.
  - Metric(s) utilized to assess the effectiveness of the programs for women employees.
- Formal Systems/Processes for Hiring, Performance Appraisal/Evaluation and Promotion:
  - Inclusion in a written policy or commitment statement to eliminate gender bias and discrimination.
  - Action(s) taken to minimize gender bias and discrimination and maximize their effectiveness for women employees.
  - Practice(s) utilized to minimize gender bias and discrimination and maximize their effectiveness for women employees.
    - Executive Search Firms – Levels they are used for and types of assistance provided.
  - Metric(s) utilized to assess their effectiveness for women employee

6. Employee Protections
- Existence of a written organization-wide policy that explicitly condemns sexual harassment in the workplace.
- Existence of requirements that:
  - New hires sign arbitration contracts agreeing not to join class action lawsuits.

- Employees take sexual harassment claims to private arbitration either through organization policy or mandatory arbitration clauses in employment contracts.
- Nondisclosure agreements pertaining to claims of sexual harassment in settlement agreements.

7. **Corporate Brand & Social Responsibility**
   - Advertising and marketing content evaluated for gender biases prior to publication.
   - Supplier diversity program that includes certified women-owned businesses.
   - Percentage of the organization's expenditures on the supplier diversity program that went to certified women-owned businesses last year ($).
   - Action(s) taken to ensure that all products, services, and facilities are not used for any form of exploitation or abuse of women and girls.
   - Products offered that target women clients or customers designed to benefit women's health, well-being, safety, educational opportunities, career advancement, or other means of achieving gender parity and equality.
   - Programs offered or sponsored for women who are not employees.
   - Metrics utilized to assess performance with women clients/customers and vendors/suppliers.
   - Percentage of the organization's venture capital funding that went to certified women-owned businesses last year.
   - Public campaign with the primary mission of advocating for gender parity or equity in the workplace during the last year.
   - Amount of monetary support given last year to any non-profit organization(s) with the primary mission of advocating for gender parity or equity in the workplace ($).

8. **Accountability & Transparency:**
   - Levels that are held accountable for achieving the strategic objective and/or policy to advance diverse women in the organization's workforce.
   - Components of the employee performance management program linked to achieving the strategic objective and/or policy to advance women in the workforce by level.
   - Inclusion of a requirement of audit by a third-party provider in the pay equity policy.
   - HR programs that all employees in engineering and technology are invited to apply.
   - HR programs that all employees in engineering and technology positions are informed about including requirements for participation.
   - Policy to inform all employees of their high-potential designation.
   - How the organization conducts formal investigations of all sexual harassment allegations.
   - Information on the organization's position, goals, actions, and progress in advancing diverse women in its workforce shared with the organization's board of directors and made public, or that will be in the next 12 months.
   - CEO public pledge to advance diverse women in the organization's workforce.
   - Gender equity/parity certifications the organization holds.
   - National and international programs to advance diverse women in the workplace that the organization is a member or signatory.
   - Any additional information the organization would like SWE A4E to know about its programs, policies, and practices to advance women in its workforce.

C. Corporate Culture

1. **Employee Resource Groups (ERGs) for Women & Male Allies**
   - Types of ERGs offered to employees in engineering and technology positions.
   - Support provided to each type.
   - Percentage of women employees who participate in ERGs for women by position (Top Management, Engineering, Technology).

- Percentage of men employees who participate in ERGs for Male Allies by position (Top Management, Engineering, Technology).
- Types of activities and benefits provided to each type.
- Metric(s) utilized to assess their effectiveness for diverse women employees in engineering and technology positions and their male allies.
- Formal programs and activities for men employees who want to actively support the advancement of women in its workforce beyond change teams and ERGs.

2. Utilization of Employee Benefits and Work/Life Balance Options

- Employees that commonly have an anytime (24/7), anywhere work schedule by level.
- Action(s) taken or planned within the next 12 months to address the lack of work/life balance for employees with an anytime and/or anywhere work schedule.
- Percentage of employees that utilized at least one work/life balance option during the last year by gender and position (Top Management, Engineering, Technology).
- Percentage of employees who utilized at least one work/life balance option last year that were promoted by gender and position (Top Management, Engineering, Technology).
- Percentage of employees who utilized at least one work/life balance option last year that are no longer employed by the organization by gender and position (Top Management, Engineering, Technology).
- Percentage of employees who returned from maternity/paternity leave last year that were promoted by gender and position (Top Management, Engineering, Technology).
- Percentage of employees who returned from maternity/paternity leave last year that are no longer employed by the organization by gender and position (Top Management, Engineering, Technology).

3. Employee Experience/Engagement Survey and Culture Assessment

- Employee experience/engagement survey for all employees:
  - Frequency that it is conducted.
  - Copy of the survey.
  - Employee net promoter score (eNPS) and method for calculating.
  - Ability to track results by gender and position (Top Management, Engineering, Technology).
  - Average eNPS score for employees by gender and position (Top Management, Engineering, Technology).
  - Gender-related cultural issues revealed by position (Top Management, Engineering, Technology).
  - Administrator of the survey.
- Organization-wide culture assessment:
  - Frequency that it is conducted.
  - Gender-related issues cultural issues revealed by position (Top Management, Engineering, Technology).
- Metric(s) utilized to assess how inclusive and supportive the organization's culture is of diverse women employees.