



Inclusion in Action: The Catalyst CEO Champions For Change—Methodology

These findings are based on responses to a survey distributed to all *Catalyst CEO Champions For Change* companies that were eligible to participate. Fifty-six companies responded to the survey and self-reported employee demographic data. The survey findings are reported in aggregate to protect the anonymity of the respondents and confidentiality of their data.

Survey participants were asked to report data on the following segments of their global workforce:

Executives are individuals who plan, direct, and formulate policies, set strategy, and provide the overall direction of the enterprise/organization. Working at the highest levels of the organization, they plan, direct, or coordinate activities with the support of subordinate executives and staff managers. A large company's executives often include people within two reporting levels of the CEO whose responsibilities entail frequent interaction with the CEO. At smaller organizations, "executives" may include the CEO and his or her direct reports only.ⁱ For the purposes of this survey, this category includes Executive Committees and Office/Department Heads in law firms, as well as Executive Leadership in professional services firms. Calculations are based on the number of *Catalyst CEO Champions For Change* Executive positions held by women divided by the total number of *Catalyst CEO Champions For Change* Executive positions.

Senior Managers include employees who determine the policy and direction of the organization or a functional area and direct its activities, usually through other managers. They control the selection of senior employees and the allocation of resources.ⁱⁱ For the purposes of this survey, this category includes Management Committees in law firms and Partners in professional services firms. Calculations are based on the number of *Catalyst CEO Champions For Change* Senior Manager positions held by women divided by the total number of *Catalyst CEO Champions For Change* Senior Manager positions.

Managers include employees who coordinate and organize the activities of a discrete unit or service within the organization, usually reporting to a senior manager. They establish operational and administrative procedures, formulate policy relevant to their areas, and organize, lead, and direct others to achieve their goals. They are likely to include first- to mid-level managers.ⁱⁱⁱ For the purposes of this survey, this category

includes Partners in law firms and Senior Managers in professional services firms. Calculations are based on the number of *Catalyst CEO Champions For Change* Manager positions held by all women divided by the total number of *Catalyst CEO Champions For Change* Manager positions.

Boards of Directors members include Executive Committee members in law firms for the purposes of this survey. Survey participants were asked to report data for all Boards of Directors members, which may span multiple countries/markets. Calculations are based on the number of *Catalyst CEO Champions For Change* Board of Directors positions held by (1) women and (2) women of color, each divided by the total number of *Catalyst CEO Champions For Change* Board of Directors positions.

Survey participants were asked to report data on the following segments of their United States workforce only:

Executive/Senior-Level Officials and Managers are individuals who plan, direct, and formulate policies, set strategy, and provide the overall direction for companies within the parameters set by their boards of directors. Typically, this includes individuals within two reporting levels of the CEO (e.g., COOs, CFOs, line-of-business heads, presidents or executive vice presidents of functional areas, chief information officers, chief human resources officers, chief marketing officers, chief legal officers, management directors, and managing partners).^{iv} For the purposes of this survey, this category includes Executive Committees, Office/Department Heads, and Management Committees in law firms and Executive Leadership in professional services firms. Calculations are based on the number of *Catalyst CEO Champions For Change* Executive/Senior-Level Officials and Managers positions held by (1) all women and (2) women of color, each divided by the total number of *Catalyst CEO Champions For Change* Executive/Senior-Level Officials and Managers positions.

First/Mid-Level Officials and Managers are individuals who typically lead major business units and report into executive/senior-level management. This category includes those who oversee the delivery of products, services, or functions at group, regional, or divisional levels within the parameters set by Executive/Senior Level management (e.g., vice presidents and directors; group, regional, or divisional controllers; treasurers; human resources, information systems, marketing, and operations managers). For the purposes of this survey, this category includes Partners in law firms and Partners in professional service firms. Calculations are based on the number of *Catalyst CEO Champions For Change* First/Mid-Level Officials and Managers positions held by (1) all women and (2) women of color, each divided by the total number of *Catalyst CEO Champions For Change* First/Mid-Level Officials and Managers positions.

Women of color are women who identify as Hispanic or Latina, Black or African American, Native Hawaiian or Other Pacific Islander, Asian, Native American or Alaska Native, or women of two or more races/ethnicities.

For the questions on the global workforce, definitions of terms were taken from Mercer's unpublished descriptions of job categories. Mercer, [*When Women Thrive, Businesses Thrive*](#) (2016): p. 31.

For the questions on the US workforce, definitions of terms were taken from the EEOC descriptions of job categories and race and ethnic identification. U.S. Equal Employment Opportunity Commission (EEOC), "[Equal Employment Opportunity Standard Form 100, Rev. March 2018, Employer Information Report EEO-1 Instruction Booklet.](#)"

Due to limited available data, the survey findings for 2017 were compared against sources providing data from the most recent available years in 2015 and 2016.

The survey findings for the global workforce representation were compared against the representation of all women among Executives, Senior Managers, and Managers across the 350 participating organizations in Mercer's study. Mercer, [*When Women Thrive, Businesses Thrive*](#) (2016): p. 31.

The survey findings for the US workforce representation were compared against the representation of women of color among Executive/Senior-Level Officials and Managers and First/Mid-Level Officials and Managers in the S&P 500 index. The survey findings were also compared against the representation of (1) all women among Boards of Directors in the S&P 500 index, and (2) women of color among Boards of Directors in the S&P 200. Catalyst, [Pyramid: Women in S&P 500 Companies](#) (June 1, 2018); Catalyst, [Women in S&P 500 Companies by Race/Ethnicity and Level](#) (October 12, 2017); Spencer Stuart, [2017 Spencer Stuart U.S. Board Index](#) (2017): p. 8. Spencer Stuart's analysis of race/ethnicity among board representation examined the top 200 organizations of the S&P 500; Spencer Stuart, [2017 Spencer Stuart U.S. Board Index](#) (unpublished data) (2018).

ⁱ Mercer, [*When Women, Thrive Businesses Thrive*](#) (2016): p. 31; Carole Jackson, Mercer, Email message to author, February 5, 2018.

ⁱⁱ Mercer, [*When Women, Thrive Businesses Thrive*](#) (2016): p. 31; Carole Jackson, Mercer, Email message to author, February 5, 2018.

ⁱⁱⁱ Mercer, [*When Women, Thrive Businesses Thrive*](#) (2016): p. 31; Carole Jackson, Mercer, Email message to author, February 5, 2018.

^{iv} Equal Employment Opportunity Commission (EEOC), [Employer Information Report EEO-1 Instruction Booklet \(March 2018\)](#).