**Questionnaire for organisations**

The IFoA is consulting on proposals to incorporate diversity, equity, and inclusion (DEI) values into its regulatory framework. Organisations responding to the consultation should use this questionnaire. Please follow the “How to” guidance below, to respond on behalf of your organisation. If you would like to provide a personal response, please [go to our questionnaire for individuals](https://forms.office.com/Pages/DesignPageV2.aspx?subpage=design&token=f4dff7f7e6f6400291b8e47e59c3e2b1&id=vrU_XK2tDkuSD433-d6sdLNIoGwOnthBjJS4tmOrNjFUM1hMSVI3T1VHU0IzQTQzTVpVREI5NFhYRiQlQCN0PWcu).

If you have any questions about these proposals or about responding to this consultation, or if you require materials in a different format, please get in touch by emailing the team at [regulation@actuaries.org.uk](mailto:regulation@actuaries.org.uk).

Thank you for taking part in this consultation. Your input is very valuable to the IFoA.

**How to take part using this questionnaire**

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| **1** | **Read the proposals** | Please ensure that everyone involved in drafting your organisation’s response has read the full proposals before taking part.  [Go to the IFoA website to read the proposals](https://actuaries.org.uk/proposals-for-regulatory-requirements-on-DEI/). |
| **2** | **Read the Q&A** | This is designed to provide clarity and should be read in conjunction with the proposals. We strongly recommend everyone involved in drafting reads the Q&A, as it is designed to provide reassurance for anticipated areas of concern.  [Go to the IFoA website to read the Q&A](https://actuaries.org.uk/standards/regulatory-communications-and-consultations/current-consultations/proposals-for-regulatory-requirements-on-dei/consultation-on-diversity-equity-and-inclusion-dei-q-a/). |
| **3** | **Draft response** | Please use this questionnaire to draft your response. To help coordinate your response you can use [Track Changes](https://support.microsoft.com/en-us/office/track-changes-in-word-197ba630-0f5f-4a8e-9a77-3712475e806a) to collaborate with colleagues.  Please only include personal data relevant to your response and that you are lawfully entitled to supply. Any personal data provided in this questionnaire, or otherwise, will be processed in accordance with UK data protection law and the IFoA’s [Privacy Policy](https://www.actuaries.org.uk/privacy-policy). |
| **4** | **Submit response** | Please send your completed response to [regulation@actuaries.org.uk](mailto:regulation@actuaries.org.uk) with the subject line “Regulatory consultation response,” no later than 15 April 2023.  Please provide a copy of your response in the format of this download (“.docx”), as we will be using automation to collate responses in Microsoft Excel. |

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| **About your response to the consultation** | | | | | | | |
| **Your publication preferences** | | | | | | | |
| Following the consultation, the IFoA will publish a report which includes:   * a list of organisations who have responded; and * the full written comments received in response to each consultation question.   The IFoA will not publicly attribute comments to respondents, unless the comments themselves identify the respondent, either directly or indirectly.  If you would prefer that your organisation’s name or comments not to be included in the published report, please indicate that here. | | | | | | | |
| Do you agree to your organisation’s name appearing in a published list of respondents? | | | | | | Please select | |
| Do you agree to your organisation’s comments being published in the report? | | | | | | Please select | |
| **About your organisation** | | | | | | | |
| **Name** | Click to respond | | | | | | |
| **Type** | Please select | | | Click here to specify “Other” | | | |
| **About IFoA members employed by your organisation** | | | | | | | |
| **Number** | How many IFoA members does your organisation employ? | | | | | Please select | |
| **Number** | How many IFoA members does your organisation employ? | | | | | Please select | |
| **Locations** | Below is a list of the fifteen countries in which most IFoA members are based.  Please tick all countries in which IFoA members employed by your organisation are based. Please use the additional space provided to list any countries not included in the list. | | | | | | |
| **Australia** | **Canada** | **China** | | **Hong Kong** | | **India** |
| **Ireland** | **Kenya** | **Malaysia** | | **New Zealand** | | **Singapore** |
| **South Africa** | **Switzerland** | **UK** | | **USA** | | **Zimbabwe** |
| Click to list all other counties not included above | | | | | | |
| **Your contact details (if applicable)** | | | | | | | |
| Following the consultation, we may contact you about your response. If you are content to be contacted by us, please provide details. | | | | | | | |
| **Name** | Click to respond | | | | | | |
| **Email address** | Click to respond | | | | | | |
| **ARN** | Click to respond | | | | | | |
| Please send your completed form to [regulation@actuaries.org.uk](mailto:regulation@actuaries.org.uk) by no later than 15 April 2023 | | | | | | | | |

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| **Your response to the consultation (1 of 3)** | | |
| **Question 1** | |
| To what extent do you agree with the proposal to amend Principle 1.1?  Please provide any reasons or further explanation for your response in the space below. | | Please select |
| Click here to provide any reasons or further explanation for your response | | |
| **Question 2** | |
| To what extent do you agree with the proposal to add a new Principle 1 .2 to introduce an obligation on Members to encourage DEI?  Please provide any reasons or further explanation for your response in the space below. | | Please select |
| Click here to provide any reasons or further explanation for your response | | |
| **Question 3** | |
| To what extent do you agree with the proposal to add a new Principle 1.3 to introduce an obligation on Members not to subject others to bullying, victimisation or harassment?  Please provide any reasons or further explanation for your response in the space below. | | Please select |
| Click here to provide any reasons or further explanation for your response | | |
| **Your response to the consultation (page 2 of 3)** | | |
| **Question 4** | |
| To what extent do you agree with the proposal to amend Principle 5 to include specific DEI requirements?  Please provide any reasons or further explanation for your response in the space below. | | Please select |
| Click here to provide any reasons or further explanation for your response | | |
| **Question 5** | |
| Do you feel that you would have any concerns about your ability to comply with the proposed amendments to the Code?  Please provide any reasons or further explanation for your response in the space below. | | Please select |
| Click here to provide any reasons or further explanation for your response | | |
| **Question 6** | |
| How significant do you think the impact of the proposed amendments to the Code would be on your professional or personal life?  Please provide any reasons or further explanation for your response in the space below. | | Please select |
| Click here to provide any reasons or further explanation for your response | | |
| **Your response to the consultation (page 3 of 3)** | | |
| **Question 7** | |
| Do you feel that DEI values would be better reflected within guidance only?  Please provide any reasons or further explanation for your response in the space below. | | Please select |
| Click here to provide any reasons or further explanation for your response | | |
| **Question 8** | |
| Are there any other areas of the Code you feel ought to be amended to reflect DEI expectations?  Please provide any reasons or further explanation for your response in the space below. | | Please select |
| Click here to provide any reasons or further explanation for your response | | |
| **Question9** | |
| If you wish to provide any other feedback not already covered then please do so here. | | |
| Click to respond | | |