
FAQ's

There are a large number of questions covered in the questionnaire. Will managers be expected to put in considerable time answering every question every year?

It is intended that signatories will send the questionnaire to managers on an annual basis. Therefore, while it may take a certain time commitment to fill out the questionnaire in the first year, it is expected that in subsequent years, managers should just be updating figures and any changes in approach, representing less of a time commitment. Where managers have more than one client that is a signatory, this should cut down on duplication of work, as the same responses can be distributed to these clients.

Do managers have to answer all questions in the questionnaire?

It may not be possible for all managers to answer all the questions in the questionnaire. The questionnaire is intended as a gold standard, and as a point for managers to work towards.

Can signatories remove questions from the questionnaire?

No. The purpose is to create a standardisation. If signatories start removing questions it makes it more difficult for managers to answer and creates barriers to data collection. Signatories are not however precluded from adding any supplementary questions. The working group will seek feedback from signatories to amend the template where required and to ensure it encompasses developing best practice.

Will allowance be made for smaller managers who are unable to disclose under certain questions for data protection reasons?

Yes. Where information is unable to be disclosed for data protection reasons, managers should not provide this. We ask managers to indicate where this is the case. The qualitative section of the questionnaire gives managers the opportunity to disclose broader qualitative information about their approach.

Do asset owners have to send the questionnaire to all their managers every year?

The charter is intended as a signal of intent via which asset owners can commit to integrating harmonised diversity and inclusivity considerations into their existing monitoring of managers. It is expected that asset owners integrate the questionnaire where practicable across external managers. Where asset owners may have a great deal of managers, it is expected that a pragmatic approach is taken where certain managers may be prioritised above others first.

Are there any reporting requirements?

We are planning to produce a progress report which will include case studies, best practice and findings from the questionnaire. This will inform ongoing manager monitoring and engagement. We may reach out to signatories for examples and input. There are no assessments and reporting requirements for the charter itself.

Is there a deadline to send the questionnaire out?

We are aware that some signatories will need to update the systems they use for sending questionnaires out to managers and that there may be a cycle to update these systems. There is no set date for sending the questionnaire out, we encourage signatories to implement as soon as practical possible and at the latest within a year of signing.

Any further questions can be sent to diversitycharter@brunelpp.org.