

2026 California Insurance Diversity Survey

PART 1 - BOARD DIVERSITY NARRATIVE



GOVERNING BOARD DIVERSITY QUESTIONS

This printable format of the 2026 CAIDS Board Diversity Narrative is a tool to help you prepare your report before entering it into the CAIDS Insurer Portal. The online survey includes “tooltips” to guide you through each question.

Important: Insurers must provide mandatory disclosures to each board member, prior to, or concurrently with, the survey. Disclosures must outline board members decision to disclose their demographics is voluntary, no adverse action may be taken against the board member or the insurer if the board member declines to participate in the survey, and aggregate data collected for each demographic category will be reported.

QUESTION 1

Provide the name of the company with the Board of Directors that represents the ultimate controlling party of the insurance group.

QUESTION 2

2a: How many people serve on this Board of Directors? TOTAL

2b: Of those in 2a, how many identify as:

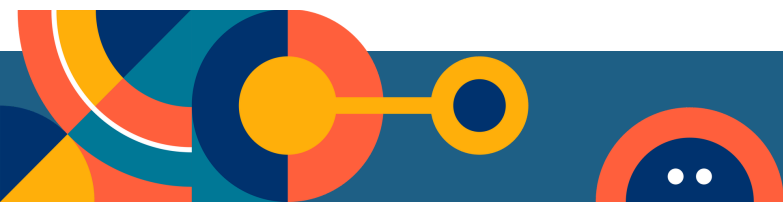
- i. Women
- ii. Men
- iii. Non-binary
- iv. Decline to State

2c: Of those in 2a, how many identify as:

- i. Disabled Veteran
- ii. LGBT
- iii. Veteran
- iv. Person(s) with Disabilities

2d: Of those in 2a, how many identify as:

- i. Native American
- ii. African American
- iii. Black
- iv. Asian - please specify:
 - a. Asian - Cambodian
 - b. Asian - Chinese
 - c. Asian - Filipino
 - d. Asian - Indian
 - e. Asian - Japanese
 - f. Asian - Korean
 - g. Asian - Laotian
 - h. Asian - Vietnamese
 - i. Asian - Multiple/Other
 - j. Asian - Decline to state
- v. Pacific Islander - please specify:
 - a. Pacific Islander - Guamanian
 - b. Pacific Islander - Hawaiian
 - c. Pacific Islander - Samoan
 - d. Pacific Islander - Other/Multiple
 - e. Pacific Islander - Decline to state
- vi. Hispanic/Latino/Latina
- vii. Multi-Ethnic
- viii. Caucasian
- ix. Other - please specify:
- x. Decline to state



QUESTION 3

Of the board members in Question 2 sections b, c, and d that identified as a Woman, Disabled Veteran, Veteran, LGBT Person, Person with Disabilities, or non-Caucasian, how many:

3a: Currently serve as an officer of the corporation? Check all positions currently held by the board members:

Chief Executive Officer	<input type="checkbox"/>	President	<input type="checkbox"/>
Chief Financial Officer	<input type="checkbox"/>	Secretary	<input type="checkbox"/>
Chief Operations Officer	<input type="checkbox"/>	Treasurer	<input type="checkbox"/>
Chief Human Resources Officer	<input type="checkbox"/>	Director	<input type="checkbox"/>
Chief Diversity Officer	<input type="checkbox"/>	Other - please specify:	<input type="text"/>
Chairperson of the Board	<input type="checkbox"/>		

3b: Currently serve as as the chair on one of the board committees? Check all committees currently chaired by these board members below:

Audit	<input type="checkbox"/>	Nominating/Corporate Governance	<input type="checkbox"/>
Compensation	<input type="checkbox"/>	Regulator, Compliance, & Gov. Affairs	<input type="checkbox"/>
Finance	<input type="checkbox"/>	Other - please specify:	<input type="text"/>

QUESTION 4

Do governing board members serve under term limits?

No Yes

If **no**, provide the average number of years served by the current governing board:

If **yes**, provide: Number of **years** per term: Maximum number of **terms** a member may serve on this board:

QUESTION 5

Does the charter or governance guidelines of the governing board and/or any of its committees include the goal of increasing and/or improving diversity on the company's governing board?

A "board diversity policy statement" is any language that refers to an insurer's corporate governance policy or guidelines, with the goal of increasing governing diversity on the insurer's board of directors. Board diversity language as part of an insurer's corporate governance policy describes how the board considers gender, ethnicity, race, age, geographic location, sexual orientation, skills, and experience when identifying director candidates and throughout the nomination process.

If **yes**, indicate where this language can be found and share below the language of the governing board diversity policy statement:

QUESTION 6

Does your company have measurable goal(s) to add one (or more) diverse board member(s) on its Board of Directors?

A “diverse board member” means an individual who self-identifies as a woman, nonbinary, Black, African American, Hispanic, Latino-Latina, Asian, Pacific Islander, Native American, Native Hawaiian, Alaskan Native, person with disabilities, veteran or disabled veteran, lesbian, gay, bisexual, transgender, or queer.

Yes, we have measurable board diversity goals.

If yes, indicate where the language of the aforementioned measurable goals can be found and share the language here:

No, but there are plans to develop said goal(s) within the next 0 - 12 months.

No, but there are plans to develop said goal(s) within the next 12 - 24 months.

No, but there are plans to develop said goal(s) within the next 24+ months.

No, there are no plans to develop board diversity goal(s).

If no, explain why your company has no plans to develop board diversity goals within the next 24+ months:

QUESTION 7

When assessing prospective board members, is diversity one of the attributes used within the formal evaluation criteria by the nominating committee and by the board?

No

Yes

If yes:

Is a benchmark percentage of diverse candidates set to be considered or interviewed for open board member positions?

What is the benchmark percentage used? (Example: enter 50% as 50)

QUESTION 8

Were there any board member vacancies in the past 3 years?

No

Yes

If yes:

What percentage of candidates considered were diverse? (Example: enter 50% as 50)

What percentage of candidates interviewed were diverse? (Example: enter 50% as 50)

QUESTION 9

9a: Does your company actively engage in outreach efforts to diversify your board? This can include outreach efforts that are ongoing or intermittent as vacancies arise.

No Yes

If yes, check all outreach and communication practices in which your company engages:

EVENTS – seminars, meet-and-greets, trainings, etc.

Attend meet-and-greets to scout potential members

Host seminar on how to get on corporate boards

Share the name of an event you attended/hosted that has best guided and/or influenced growth of your governing board diversity efforts:

MEDIA – advertising, announcements, interviews, etc.

Traditional media (newspaper, television commercial, etc.)

Ethnic media outlets

Letters to diverse organizations, chambers of commerce, etc.

Recruitment brochures

Social media - please specify:

Trade publications

Share the name of a media group or outlet that has best guided and/or influenced growth of your governing board diversity efforts:

ORGANIZATIONS – membership, affiliation, sponsorship, etc.

Member of ethnic chamber of commerce

Member/affiliate of other organization

Share the name of an organization that has best guided and/or influenced growth of your governing board diversity efforts:

PROGRAMS & RESOURCES – search firms, mentorship, training, locator, etc.

Assemble internal board development team

Manage and run a governing board diversity mentorship program (in-house)

Participate in a governing board diversity mentorship program

Operate a website dedicated to governing board diversity efforts. Provide link:

Retain executive search firm(s) specializing in placing diverse candidates

Technical assistance / training program for diverse candidates

Share the name of a program(s) or resource(s) checked above that has best guided and / or influenced growth of your governing board diversity efforts:

OTHER specify:

9b: Explain how, and to what extent, these strategies and practices have been successful in establishing relationships with diverse candidates for board positions:

QUESTION 10

Additional Comments:

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PART 2 - SUPPLIER DIVERSITY NARRATIVE



SUPPLIER DIVERSITY QUESTIONS

This printable format of the 2026 CAIDS Supplier Diversity Narrative is a tool to help you prepare your report before entering it into the CAIDS Insurer Portal. **Helpful Tips:** The online survey includes “tooltips” to guide you through each question. **Key Terms:** You can refer to the [2026 CAIDS Glossary & Industry Categories](#) for clear definitions. **More Resources:** Visit www.insurance.ca.gov/diversity and click on ‘Diversity Survey’ for extra documents. **Support:** For any other questions, email the team at CA.IDS@insurance.ca.gov.

QUESTION 1

Does your company/group have a supplier diversity policy statement?

A supplier diversity policy statement is any language that refers to the company's/group's policies in regards to supplier diversity, with the goal of procuring goods and services from diverse businesses.

Yes No No, but there are plans to create one within the next 12 months

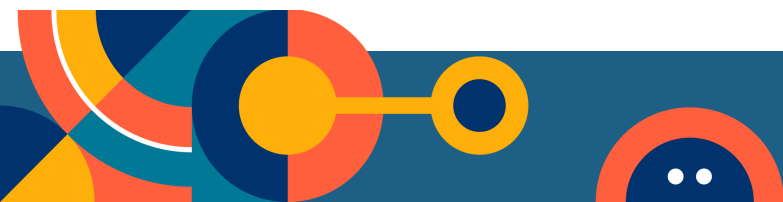
If yes, provide the supplier diversity policy statement below:

Provide a list of all documents in which the statement can be found (i.e. website, company/group report, board charter, etc.).

If the statement is available online, provide link here:

If no, explain why:

If no, but will be creating one within the next 12 months, provide a timeline for when your company/group expects the policy statement to be completed, and any other details available at this time (i.e. policy language, policy creation team, etc.)



QUESTION 2

Does your company/group have a supplier diversity program?

A supplier diversity program is any formal plan and / or structure that has been setup specifically for the company/group to implement its supplier diversity policy statements.

Yes

No

No, but there are plans to create one within the next 12 months

If yes, provide an overview of the program:

If the program has a designated webpage, please provide the link here:

If no, explain why:

If no, but will be creating one within the next 12 months, provide a timeline for when your company/group expects the program to begin, and any other details available at this time (i.e. program plan, program director, etc.)

QUESTION 3

Does your company/group conduct outreach specifically to diverse businesses?

Yes No

If yes, respond to parts a, b, c, and d below:

3a. Share all company/group outreach efforts including communication strategies and practices, that are conducted specifically to diverse businesses:

3b. Share all outreach efforts including communication strategies and practices, about supplier diversity conducted internally to company/group employees:

3c. Check all outreach and communication practices in which your company/group engages:

EVENTS – seminars, meet-and-greets, summits, etc.

- | | | | |
|-----------------------------------|--------------------------|--|--------------------------|
| Host matchmaking | <input type="checkbox"/> | Participate in matchmaking | <input type="checkbox"/> |
| Host supplier diversity events | <input type="checkbox"/> | Participate in supplier diversity events | <input type="checkbox"/> |
| Internal awards program | <input type="checkbox"/> | Sponsor matchmaking | <input type="checkbox"/> |
| Sponsor supplier diversity events | <input type="checkbox"/> | None | <input type="checkbox"/> |

Share the name of an event you attended/hosted that has best guided and/or influenced growth of your supplier diversity efforts:

MEDIA – advertising, announcements, interviews, webinars, etc.

- | | | | |
|--|--------------------------|--------------------|--------------------------|
| Traditional media (newspaper, television commercial, etc.) | <input type="checkbox"/> | Trade publications | <input type="checkbox"/> |
| Ethnic media outlets | <input type="checkbox"/> | None | <input type="checkbox"/> |

Social media - please specify:

Share the name of a media group or outlet that has best guided and/or influenced growth of your supplier diversity efforts:

ORGANIZATIONS – membership, affiliation, sponsorship, etc.

- | | | | |
|--|--------------------------|--------------------------------------|--------------------------|
| Member of a certification agency | <input type="checkbox"/> | Member of ethnic chamber of commerce | <input type="checkbox"/> |
| Member/affiliate of other organization | <input type="checkbox"/> | None | <input type="checkbox"/> |

- please specify:

Share the name of an organization that has best guided and/or influenced growth of your supplier diversity efforts:

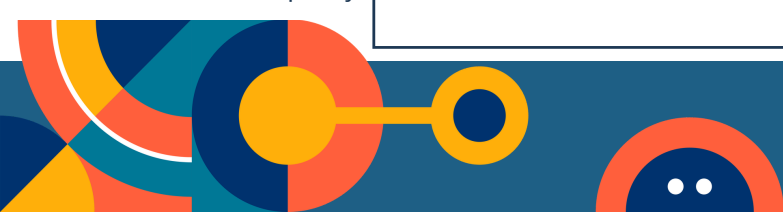
PROGRAMS – mentorship, training, locator, etc.

- | | | | |
|---|--------------------------|--|--------------------------|
| Diverse supplier registration portal member | <input type="checkbox"/> | Subscription to supplier locator or 3rd party service that identifies supplier diversity | <input type="checkbox"/> |
| Manage and run a supplier diversity mentorship program (in-house) | <input type="checkbox"/> | Technical assistance/training program for diverse suppliers | <input type="checkbox"/> |
| Participate in a diversity mentorship program | <input type="checkbox"/> | None | <input type="checkbox"/> |
| Operate a website dedicated to supplier diversity | <input type="checkbox"/> | | <input type="checkbox"/> |

- provide link:

Share the name of a program that has best guided and/ or influenced growth of your supplier diversity efforts:

OTHER specify:



3d. Explain how, and to what extent, these strategies and practices have been successful in establishing relationships with diverse businesses.

QUESTION 4

Does your company/group require and/or encourage its primary suppliers to subcontract with diverse businesses?

Yes No

If **yes**, do you track procurement spend with Tier 2 diverse suppliers? Yes No

Explain:

QUESTION 5

Does your company/group set internal targets or goals in regards to its supplier diversity statement and / or program?

Yes No

If **yes**, explain:

QUESTION 6

Is progress for the supplier diversity program part of your company's overall strategic plan or goals?

Yes No

If **yes**, explain:

QUESTION 7

Describe in detail any updates, progress, and/or best practices established by your company / group with regards to supplier diversity; include any awards or recognition received for supplier diversity work.

QUESTION 8

Additional comments

QUESTION 9

Provide the most direct contact information for the primary, secondary, and general points of contact for your company/ group's supplier diversity operations for interested diverse business enterprises:

Primary Contact - Name, Title, Phone Number, Email, Physical Address

Secondary Contact - Name, Title, Phone Number, Email, Physical Address

General Contact - Name, Title, Phone Number, Email, Physical Address