

WHERE TO START YOUR D.E.I. JOURNEY:

- A Guide to
- Employee Diversity,
- Equity, and
- Inclusion Surveys

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Section 1

Introduction: Why Focusing on Diversity, Equity, and Inclusion (DEI) Matters!

Diversity, Equity, and Inclusion hold different meanings for different people.

This guide...

- Brings clarity to these definitions - in 21st century terms
- Addresses WHY it matters
- Looks at barriers to real change
- Outlines the journey your organization can take to steer internal dialogue and action towards an all-encompassing understanding, appreciation and welcoming of human differences.

Stop the Bus! We're Spinning Our Wheels

Disparities have never been clearer or more prominent than during 2020 when protests and the media spotlighted systemic injustices. The death of George Floyd, magnified by the ideological and political intervention of Black Lives Matter, sparked a movement around the world. On June 6, half a million people turned out in nearly 550 places across the United States. Demonstrations erupted on nearly every continent; people took to the streets in London, Seoul, Sydney, Monrovia, Rio de Janeiro. These cries over human and social injustices revived calls for a closer look at what's going on in our workplaces.^{13, 14}

Moving at Glacier Speed

It's gobsmacking, really to think of the snail-slow progress we've made given that the concept of diversity is said to have been introduced in 1945. Here we are, three quarters of a century later – even with quota systems in play – with little to show.¹

Despite women making up 20% of the manufacturing workforce at the end of World War I and winning the right to vote in the 1920s. Even though one out of every four married women worked outside the home by 1945, and since the early 1970s have surpassed men in terms of college enrollment and graduation rates. Notwithstanding the fact that in 2019, there were 76,852,000 women aged 16 and over in the U.S. labor force, representing close to half (47.0%) of the total work force:⁶

- ... Only 5% of Fortune 500 CEOs were women in 2018 (that's only 24 out of 500)
- ... Men are still two to three times more likely to hold senior management level positions
- ... Hiring discrimination against Black Americans hasn't declined in 25 years (in part because employers still lean towards hiring white applicants when all other factors are equal), and
- ... Heterosexism continues to deter LGBTQ+ workers' climb up the corporate ladder

"When you start to tie these complex realities together, the numbers become increasingly stark" says sociology and behavioural science expert Dr. Leeno Karumuncher, who wonders why we can't make the headway that's needed all these decades later. "What's the point of ensuring 50% of your new hires are female, without also ensuring that they're welcomed, supported and allowed to thrive?"³

For much of the population, a majority of our waking lives are spent at work – studies suggest some 90,000 hours, or one-third of our lifetime! That fact alone underscores why organizations need to make DEI a critical agenda item. Imagine feeling judged, disrespected, underappreciated, pressured to conform and behave in a way that's not true to who you are, that prevents you from bringing your whole self to the job.



“To feel fully authentic at work, LGBTQ+ employees may wish to display photos of their partners and spouses or invite their families to client outings. Can they bring their whole selves to work in this way? How much authenticity can religious people experience when meetings are scheduled at times when they are observing their religious traditions? Can ethnic minorities feel authentic when they are discouraged from wearing traditional dress at work?”¹⁸

-Forbes, Time to Rethink Bringing Your Whole Self to Work

Some suggest that our business leaders are unable or unwilling to recognize that diversity problems exist in their organizations. Others point to companies talking the talk without a genuine commitment to walking systemic bias out the door; rather, it’s simply a matter of ticking the boxes and moving on to the next something.

A global, multi-year, cross-industry Diversity & Inclusion Benchmarking Survey commissioned by PwC tells us that in North America, companies are slow and rank low when it comes to Diversity and Inclusion (D&I) progress: ⁸

- 79% of leadership engagement on D&I remains at the basic or emerging level
- Only 26% of organisations have D&I goals for leaders
- Only 17% have a C-suite level diversity role in place while nearly 30% still have no D&I leader

Why DEI Matters – in Executive Lingo

Organizations and leaders don’t fully grasp how deeply rooted discrimination against marginalized groups is within our institutions and society as a whole, or that it’s regularly (consciously or unconsciously) expressed in the words we use.

Understanding the complexities behind diversity and the lived experiences of employees, is eye-opening for many. ‘Getting’ the big picture broadens the level of awareness needed by our leaders to tackle everyday challenges, to improve people’s lives, and ultimately to enhance corporate value operationally, financially, and culturally.

“Leaders have long recognized that a diverse workforce of women, people of color, and LGBT individuals confers a competitive edge in terms of selling products or services to diverse end users. Yet a stark gap persists between recognizing the leadership behaviors that unlock this capability and actually practicing them.”¹⁷

-Harvard Business Review

Rallying leadership around matters of DEI involves articulating the business case. A McKinsey report that our executive teams cannot afford to ignore, indicates:

- Gender-diverse companies are 15% more likely to outperform their peers and competitors, while
- Ethnically-diverse executive teams are 35% more likely to do the same.¹⁰

By classifying diversity and inclusion as a precedent for driving business results, companies see employee engagement rise. Output increase. Profitability climb.

But you can't improve what you don't measure. And this guide is meant to give you a start.

“Because crises lay bare the structural inequalities that shape our lives, they are also moments of big resets – catalysts for rebuilding societies that offer justice and safety to everyone. They provide a chance to redefine ‘normal’ rather than return to business as usual.”⁸

Now’s the Time to Redefine

WorkTango developed this resource to leverage a ‘wisdom-of-crowds’ approach, one that synthesizes how we’ve helped organizations measure diversity in their organizations and understand concepts around equity, inclusion, and belonging. We stand by our organizational and community Commitment to Equity – and hope to inspire others to understand and improve the experience and sentiment of their workforce.



As more organizations try to make change moving into 2021 and beyond, getting off the the mark begins by measuring **diversity demographics** and delving into the **sentiment of employees** around important inclusionary concepts. Before developing any plan to act, **you have to understand these two factors.**

If you’re NOT thinking about things like this and really aren’t all that interested in making change – if you just want to tick the boxes – then this resource probably isn’t for you. But if your organization’s leaders, (even just one!) has an inkling that Diversity, Equity, and Inclusion in the workplace can bring fortuitous outcomes for employees and employers alike, read on...!

Section 2

Demographic Data? Inclusivity Measurement? It's not one. Or the other. It's both, and Then Some.

Effective DEI surveys are so much more than collecting demographic data. And, so much more than collecting data about inclusivity in the work environment. DEI surveys that lead to real change are rooted in the continuous DRIVE to UNDERSTAND your organization's diverse make-up alongside the lived employee experience. In other words, understanding what's happening inside your organization and the sentiment of your employees. Understanding how included employees feel and their experience of fairness in the workplace.



2.1 Let's Establish Some Common Ground: DEI Definitions

As stated in the Harvard Business Review article *Diversity Doesn't Stick Without Inclusion*:

"It's easy to measure diversity. It's a simple matter of headcount. But quantifying feelings of inclusion can be dicey. Understanding that narrative along with the numbers is what really draws the picture for companies."¹⁷

But when we refer to diversity, to equity, and to inclusion we need to be sure we're talking apples to apples. In modern day, 21st century terms:

Diversity - is the presence of "difference" within a given setting. Differences can arise in our appearances, thoughts, likes and dislikes, values, and identities. Diversity among identities may relate to gender, race, ethnicity, religion, nationality, education, marital status, sexual orientation, (dis)ability, and socioeconomic status, to name a few.

Equity – while ‘equality’ means ‘sameness’, **EQUITY means FAIR treatment**, fair access, fair opportunity and fair advancement for all people. Equity is an approach that ensures everyone is supported in their personal and professional development. Unlike equality, equity does not aim to treat all individuals in the exact same way. Instead, equity recognizes that advantages and barriers exist, and that as a result, different people have different needs. To give you real-life examples, here are a handful of equity issues being seen today:

- i) More than 60 % of workers in the US economy cannot work remotely. Their jobs require at least some physical presence such as standing on a meat processing line, helping customers in a store, or providing healthcare services.¹⁰
- ii) Among workers age 25 and over, those with an advanced degree are more likely to work at home than are persons with lower levels of educational attainment.¹⁶
- iii) Not only has COVID-19 thrown millions of individuals out of work, but the people with the lowest incomes and educational attainment have been disproportionately affected, putting strains on achieving inclusive growth, and potentially leading to income inequality.
- iv) Small and midsize businesses and communities of color, already more severely affected by COVID-19, are also more vulnerable to disruption from increased automation.

Inclusion – is the act of creating environments in which people feel like they can bring their authentic selves to work. It means everyone feels valued, respected, and appreciated for their unique identities, even when they’re different from others. Inclusion outcomes are met when you, your institution, your policies and programs are truly inviting to all. And extends to the degree in which diverse individuals are able to participate in decision-making processes and development opportunities.

There’s Also the Matter of Belonging

Recently The Washington Post pointed to the new hot corporate buzzword popping up everywhere. “Diversity is a fact, inclusion is a behavior, but belonging is the emotional outcome that people want in their organization. What’s fueling it is a desire to have a sense of purpose at work and a sense of community,” says Christianne Garofalo, who leads diversity and inclusion recruiting at the executive search firm Heidrick & Struggles, and is one of several executives cited in the Washington Post article.⁶

To achieve end goal changes, the need for a blended understanding of demographics and sentiments is essential BEFORE framing DEI solutions or drafting plans. And that underlying knowledge comes from asking the right questions.



Section 3

Developing a Set of Questions

WorkTango's comprehensive DEI survey framework was developed by Dr. Sarah Saska, co-founder and CEO of Feminuity, and serves as the basis of our recommended Measurement Model.

3.1 DEI Index

The first part of our survey methodology pertains to the **DEI Index**. These Feminuity-advocated **questions measure the sentiment of employees** (and can be customized as required). Recommended questions fall into one of three question sets or DEI Index categories. Chart A: *DEI Methodology* illustrates WorkTango's three sentiment-based question sets specific to diversity, specific to equity and specific to inclusion (PLUS recommended Diversity Dimensions or identity characteristics).

Under the Diversity Index, for example, employees are asked to express how they feel about the following:

- My company values the differences of individuals.
- My company understands that diversity is critical to our future success.
- My company welcomes a diverse group of talent. (e.g. ethnicity, gender identity, age, disability, sexual orientation, education, religion, etc.)
- There are opportunities for me to grow and advance in my career at my company regardless of my background (e.g., gender, race, religion, disability, Indigenous identity, sexual orientation).
- The person I report to takes steps to make the workplace and services inclusive, safe and welcoming.
- I feel I can bring my whole self to work including all parts of my background (e.g., gender, race, religion, disability, Indigenous identity, sexual orientation).
- I believe my company will take appropriate action in response to incidents of harassment or discrimination.
- I feel comfortable to voice my opinion, even when it differs from the group opinion.

3.2 Diversity Dimensions

The second part of our DEI methodology relates to **Key DEI Factors** or **Diversity Dimensions**. Questions revolve around collecting **demographic insights from employees** from more than 34 different dimensions and include dimensions such as:

- | | |
|-------------------------------------|---|
| 1) Racial or cultural groups | 8) Age |
| 2) Languages | 9) Compensation |
| 3) Gender Identity | 10) Newcomer status |
| 4) Sexual orientation | 11) Socioeconomic status |
| 5) Caregiver | 12) Formal Education |
| 6) Religion or belief system | 13) Special work accommodations / requirements |
| 7) Dis/ability | |

3.3 Geographic Assessments

You can always customize and ask questions outside of these recommendations to delve into employee sentiment and diversity dimensions of direct importance to your organization. Formal education, for instance, may not be a factor for a multi-national manufacturing company reliant on low-skilled labour. For firms with operations in countries with no social tolerance for, or a firm legal stance against LGBTQ+ rights, queries about sexual orientation are best left unasked. These same locations, however, may benefit from a closer look at sexual harassment, or belittling exclusionary behaviours. Consider this recently published account of harassment and discrimination coming out of Africa:

In recent months the African tech landscape has been rocked by allegations of sexual misconduct and gender discrimination.... A pre-#MeToo survey showed that the vast majority of boards (77%) had not discussed accusations of sexually inappropriate behaviour or sexism in the workplace. For nearly all of them, recent scandals around sexual harassment didn't trigger the creation of a plan of action (88%) or any actualisation of the risk assessment regarding these issues (83%).

...No behaviours that create a feeling of inferiority, including not only sexual assault but also ridiculing behaviours, social exclusion and physical abuse, should be tolerated at any organisation. For women in the office certain patronising treatments such as insisting that they dress in certain ways not applied to their male colleagues, serve food and drinks, or not participate in certain bonding exercises (such as sporting activities), may make women feel inferior, whether directly intended or not.

- African Business Magazine,
African's Tech Ecosystem Must Tackle Sexual Harassment, August 12, 2020



While this excerpt is specific to one continent and one sector, harassment and discrimination questions are highly recommended additions to your DEI Index to help flush out the lived experience of employees – regardless of your organization’s geographic location/s.

Examples include:

Harassment: Have you experienced any unwelcome comment(s) or conduct that you felt was offensive, embarrassing or hurtful (e.g., inappropriate jokes, slurs, rumours, hurtful gossip, isolating behaviours)?

Discrimination: Have you been subject to discrimination (were you treated differently, negatively, or adversely) within the workplace based on one or more aspects of your background or identity (e.g. gender, age, ethnicity, sexual orientation, etc.)?

Chart A: Sentiment-based and demographic-based DEI Survey Methodology

DEI Assessment Methodology



Diversity Dimensions

Racial or Cultural Groups	Languages	Gender Identity
Sexual Orientation	Caregiver Status	Religion / Belief System
Disability	Age / Generation	Compensation
Socio-economic	Formal Education	Accommodations
Newcomer Status	Custom 1	Custom 2

Additional Sentiment Measures

- Harassment
- Discrimination
- Racial Injustice
- Belonging

WorkTango’s Measurement Model frames questions in a way that gets to the core of your organization’s DEI reality today and potential for tomorrow. But, as PWC suggests: **“the main challenge with diversity, equity, and inclusion assessments is building trust with employees to disclose sensitive information about themselves and their experience in the workplace.”** ⁵

And that leads us to the matter of communication.



Section 4

Communicate! Talk It Out Before You Roll It Out

Why would anyone want to voluntarily reveal something as deeply personal as their sexual orientation? Or share how judged they feel when they steal time from their work day to pray? Or tell you how as a single parent they're excluded from joining team socials that are typically scheduled when the kids need picking up from school?

Before you launch your DEI survey a few critical concepts must be clear to employees. This section is meant to serve as a checklist of key things to communicate:

4.1 Why Your Company is Doing This

Be very specific about your corporate DEI objectives. Unconscious bias training may be among one of the first in order to bring about a greater self-awareness that can break down barriers.

4.2 The Leadership Commitment

Needs to be blatant to foster a workplace that's diverse and inclusive. Muster up the masses by getting leaders to lead the charge. A LinkedIn post suggests this could come "in the form of leadership organizing, moderating conversations, or introducing panels. They don't have to be topical experts, but they should be able to show up and to lead from the front."²²

TIP! Identify an **Executive Sponsor** as part of your communication initiative to convey a sense of ownership and focus within the organization. That individual will serve as a two-way conduit from the C-suite to the entry-level newbie and reverse.

4.3 Why Participation is Important

The explanation is pretty straightforward: to understand more holistically the demographic dimensions and sentiment by the largest percentage of employees as possible. But to bring people along the DEI journey you need to communicate clearly around WHY everyone should spend 10 minutes to fill out the survey. And that means reaching out to everybody. Up one side, laterally, and down the other.



Because as PwC's survey found, misconceptions or lack of awareness aren't isolated to people at the helm:

Business leaders - who may be supportive of D&I efforts but are further removed from the day-to-day programme activity - may have misconceptions about what's actually in place in their organisations. As organisations all have subcultures, business leaders may also not be as attuned to behaviors 'on the ground' that are causing employees to feel that their environment is not inclusive. On the other hand, employees may not be aware of good work that is happening (e.g. data collection across different dimensions of diversity). Both misconceptions need to be corrected to have authentic leadership support and employee engagement in D&I.⁴

- PwC

The "good work" of your organization gets on the radar of employees by letting everyone know that demographic information is being collected. And by explaining that a diverse, fair and inclusive environment makes for a better work experience - everyone can get behind the survey with a personally compelling spin of their own.

4.3.1 Keep the message simple

Make it clear that the organization needs to know there's diversity. Needs to understand what that diversity looks and feels like. Needs to be able to foster an environment of inclusivity and belonging with better policies and better programs that:

- Invite and value different ways of being, doing, and thinking.
- Welcome participation in decision-making that affects one and all.
- Lead to broader diversified representation across all levels of management.
- Open more doors to the C-suite and seats at the boardroom table.

4.3.2 Be straightforward | transparent

Sure, age and ethnicity and education and the likes are kind of obvious and understandable when it comes to gathering statistical data related to the employee population and particular groups within it. But why is the organization asking about sexual orientation? Or gender identification beyond the binary classification of male and female?

Aren't those sorts of question best left behind bedroom doors. No. Definitely not. Be upfront about why. The truth is people have been communicating their sexual orientation for a long, long time. Think of those casual conversations we all have when we discuss our family or dating, or the family photos in our office. Part of the overarching goal of an effective DEI strategy is to build an equitable workplace where EVERYBODY can bring their true selves to work. No more leaving your identity at the workplace door like a sippy wet overcoat.

4.3.3 State the obvious

Demographic data is the first step in understanding the needs and gaps in your organization. It's revelatory. It arms you with concrete numbers to advocate and set tangible goals.

Take a page from this DEI Guide and reiterate again and again:

You can't improve what you don't measure...

- And you can't measure without the right data input.
- And the right data input hinges on honest employee feedback.
- And that candid truth comes from everyone KNOWING and TRUSTING their personal information is ABSOLUTELY SECURE AND CONFIDENTIAL.

4.4 Commit to Confidentiality and Data Privacy

Whether launching into a whole new world of Diversity, Equity, and Inclusion, or catching up and making changes, there are a couple of fundamental elements that must remain at the forefront.

Self-identification surveys must be **voluntary and confidential!**



To communicate the voluntary nature of a self-identity DEI survey, the U.S. Equal Employment Opportunity Commission (EEOC) provides the statement below, which may be used in its entirety or adapted for your workplace:²³

"The employer is subject to certain governmental recordkeeping and reporting requirements for the administration of civil rights laws and regulations. In order to comply with these laws, the employer invites employees to voluntarily self-identify their race or ethnicity. Submission of this information is voluntary and refusal to provide it will not subject you to any adverse treatment. The information obtained will be kept confidential and may only be used in accordance with the provisions of applicable laws, executive orders, and regulations, including those that require the information to be summarized and reported to the federal government for civil rights enforcement. When reported, data will not identify any specific individual."

- U.S. EEOC

Each and every employee needs to be 100% confident that their best interests are driving DEI initiatives – from protecting their privacy at all costs to reporting findings in ways that preserve confidentiality, while identifying gaps and drawing attention to areas of opportunity. WorkTango, as a third-party partner, guarantees nothing less.

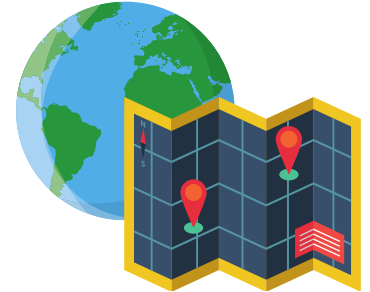
Assure employees that **responses will not be individualized**. NO employees, team members, peers, managers or executives will see this information. Ever. But be transparent about the fact that data will be shared in an aggregated form with others. Explain how communicating collective numbers prevents the identification of individuals yet allows for advocacy around how different groups of people are fairing at different levels across the organization.

"Granular, intersectional data is critical, but it also means that you may need to find alternate ways to ensure that people's experiences are centred and heard while still protecting them. Sometimes, to protect people, you may need to get creative and find ways to reflect people's experiences in your recommendations or organization-wide strategy."

- Dr. Sarah Saska, Feminuity

Keep in mind too, that data privacy regulations vary in different countries. Before piloting or updating a DEI survey, do an audit of compliance and data privacy regulations for each country where your business operates. And be acutely aware of political sensitivities, for instance:

- 80% of LGBTQ+ professionals in Russia aren't out
 - 72% in Singapore
 - 70% in China
 - 67% in India



- 72 jurisdictions criminalize private, consensual same-sex intimacy.²⁴
- 6 jurisdictions implement the death penalty for consensual same-sex sexual activity and another 5 have ruled the death penalty as a legal possibility.

4.5 Some Methods to Drive High Participation

If you've gotten your pre-survey communication ducks in a row up to this point and you're ready to convey the how and why and what for to get buy-in. Terrific! But you're not done yet. You also need to plan your post-survey communication, so that you're ahead of the game when results are in.

How will the lived employee experience, the observations, suggestions and stories, shape the organization's deeper journey?

- Where will the insights go - who will see it (Limited to a few folks? Leadership? Everyone?)
- How will an action plan be developed? Will it be shared?

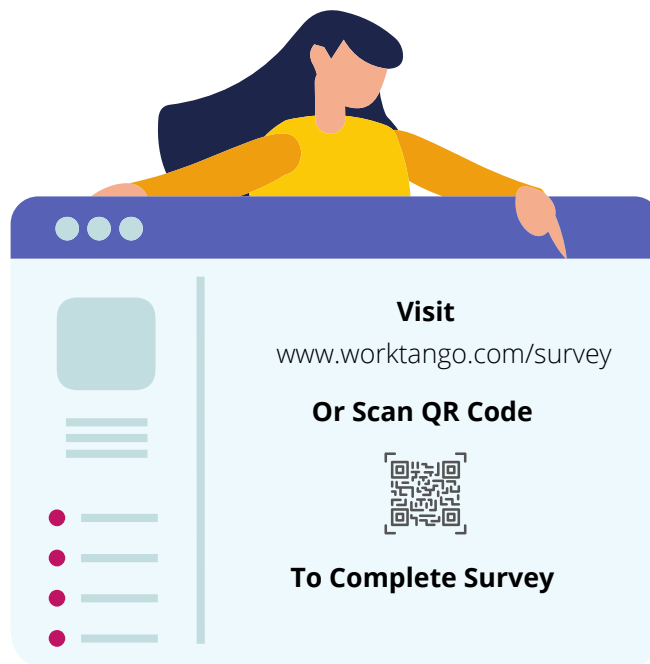
"Gathering and analysing data on discrepancies in compensation, hiring, performance and promotion is one of the most powerful ways in which organisations can tackle the unconscious biases that undermine an inclusive culture. The majority of respondents (about two-thirds based on survey data) indicated their organisations have not yet adopted this practice. However, even among those that do, employees are less likely to be aware of these efforts". – PwC Diversity & Inclusion Benchmarking Survey

Aside from survey response rates, the clearest sign that we're communicating effectively is when results are in and follow up pulse surveys tell us how our efforts are being received. Unfortunately, as PWC's finding above indicates, even organizations actively engaged in matters of DEI show a lack of clear post-survey communications.

4.6 Some Methods to Drive High Participation

Great communication plans are needed pre - during - and post survey. Uncertainty is a place where no one wants to be, so, if employees know the intention, and know what's going to happen, that alignment will keep the momentum going.

4.6.1 Make it simple – use an approach that's easy for employees to offer feedback. From a technology perspective that means using simple click-to-respond email and text formats. No downloading apps. No logging in.



4.6.2 Ask fewer questions. Technology offers the ability to skip internal demographics (such as department, location, tenure, etc.) as all that information can be extracted confidentially by your third-party supplier.

4.6.3 Gather DEI champions... in respective departments and locations who speak different languages and represent different dimensions of diversity to help communicate and add accountability to participation rates.

4.6.4 Create a Diversity Council to address the topic head on. Go beyond fun, festivities and food by including the Council's diverse perspectives in product development conversations, leadership development needs, and so on. Make sure the Council has an Executive Sponsor who's an influential and respected leader that can be a designated mentor and advocate. Leverage each council members' strategic strengths and support their individual professional development. Recognize their value as an essential business resource. Their advocacy (not to mention informal chitchats with colleagues) can bolster interest and participation at the grassroots human level.

4.6.5 Support company-sponsored memberships in local, regional, and national diversity and inclusion associations so that i) your employees are able to continue their development and have communities of support, and ii) so that your company is investing more broadly in this work. This can include affinity groups from almost every profession and sector. [This list](#) of 25 Toronto-based organizations is an example to get you started.

4.6.6 Tie your DEI efforts to a greater cause – popular examples include making donations to important DEI causes and sweetening the pot by offering to double contributions if the organization hits a certain survey participation rate. This wee competitive twist is a great way to link your DEI initiative and company to a larger cause, community-based or other.



“The medium IS the message”!

Canadian philosopher and media theorist Marshall McLuhan's famed statement couldn't ring truer than it does when it comes to DEI surveying. If even one person is somehow overlooked or excluded from contributing to the process, the process is flawed. That's why you need to cover all bases.

Section 5

Deployment Considerations

Ensuring That Your Diversity, Equity, and Inclusion Survey Is..., Well Inclusive!

In an effort to provide your entire employee population with an opportunity to share their DEI views, an inclusive methodology needs to span a broad range of requirements. Some data collection methods can lead to the exclusion of people with low education or comprehension levels, people who are technologically illiterate, or have disabilities, or language limitations.

Anything that impedes ALL employees' rights to self-identify and self-express introduces bias into your DEI population estimates.

Therefore, an essential part of your DEI planning and preparation is to think about wording, format, context, and translation. How many languages do you need to accommodate? What modes of data collection are required: text and email formats easily accessed and viewed via laptop, table top, notepad and smart phone? Computer kiosks for those who don't have work access to a computer? Paper surveys desk-dropped or mailed?



5.1 What About Adaptive Technologies?

People with severe visual impairment, for example, may need text instead of images for translation into audible or legible words by screen reading devices, and audio command technology to register their responses. Avoid use of high-frequency sounds that are difficult to hear.²⁶

Persons with low vision may need large-font text and effective color contrast.

People with dyslexia or cognitive impairments or language and literacy challenges will benefit from the use of simple language and clear, logical layouts.

People with pronounced physical or cerebral impairments may need help to navigate with a keyboard rather than with a mouse, or rely on proxy respondents or assisted in-person or by-phone interviews – in which case, is sensitivity training required around communication, stamina and cognitive considerations?

5.1 What About Adaptive Technologies?

People with severe visual impairment, for example, may need text instead of images for translation into audible or legible words by screen reading devices, and audio command technology to register their responses. Avoid use of high-frequency sounds that are difficult to hear.²⁵

- Evaluate issues of literacy and computer access
- Keep questions brief
- Use simple language and reword questions - if needed - for improved comprehension

TIP! Don't be surprised if you get significant under reporting in the initial years of self-identification. That's part and parcel of building trust, being transparent without exposing confidential information, and then demonstrating the organization's trustworthiness by acting on findings. Once your organization has established that credibility and changes are visibly in the works, those DEI participation rates will change too.



ALL for one and one for ALL!

Accessibility

Can everyone access the survey and offer feedback regardless of their personal and work-related challenges or circumstances? *Think screen readers, smart phone devices, free-standing kiosks, paper surveys, audio-call in...*

Language

Can everyone access the survey and offer feedback regardless of their mother tongue or preferred language of communication? And is inclusive language being used to meaningfully connect with LGBTQ+ employees? *Words dealing with identity hold a specific importance to those that embrace a particular label. Learning and using these labels is an essential part of queer-inclusivity.*

Limitations

Can everyone access the survey and offer feedback regardless of educational or literacy levels? Is there a specific reading grade level that needs to be considered? *New York Times articles have a grade 10 reading level and romance novels have about a grade 5 reading level. The average rule of thumb is to write for a grade 8 reading level.*²⁷

Anticipate limitations and break down ALL barriers!

Section 6

What Insights Should You Be Looking For?

Your Diversity, Equity, and Inclusion survey has been deployed. Feedback is rolling in. Now what? What do you need to be thinking about?

Well for starters it's time to share all that incoming information.

You've already thought about whether everyone should have access to survey results in the name of transparency and insight accessibility. This is an inclusionary initiative after all. But these are sensitive topics too!

So, in keeping with WorkTango's recommendations and the widely held consensus among DEI experts:

- Employees get aggregate sentiment data
- Managers receive the sentiments of their team/s relative to the whole company
- Executives, your DEI team, and HR are given access to aggregate sentiments and diversity dimension data

6.1 Focus Attention on What You're Doing Well, and Where You're not

Look at results independently: measure Diversity Dimensions (demographic questions) separate from Diversity Index responses (the questions that measure employee sentiment).

- What are the results of the questions asked?
- How do findings fit with your organization's end goals?
- How do demographic details compare with data already residing in your HR system?

6.2 Take a Good Long Look at Data by DEI Index

What sentiments are being met with positivity? Conversely, where are the gaps and opportunities for improvement?

Chart B: Example of employee sentiment feedback specific to the Diversity Index tells us there's a general consensus (92%) that their company invests time and energy into building diverse teams. This expressed sentiment is 5% above the DEI Index survey benchmark tracked by WorkTango. However, 38% of respondents feel negatively about leadership's effort to create a safe space that is welcoming for all, while another 54% report not feeling comfortable enough to bring their authentic self to work. Together, these sentiment scores suggest there's room to improve leaderships' understanding around what diversity encompasses and the need to listen and act.

CHART B: Example of employee sentiment feedback specific to the Diversity Index

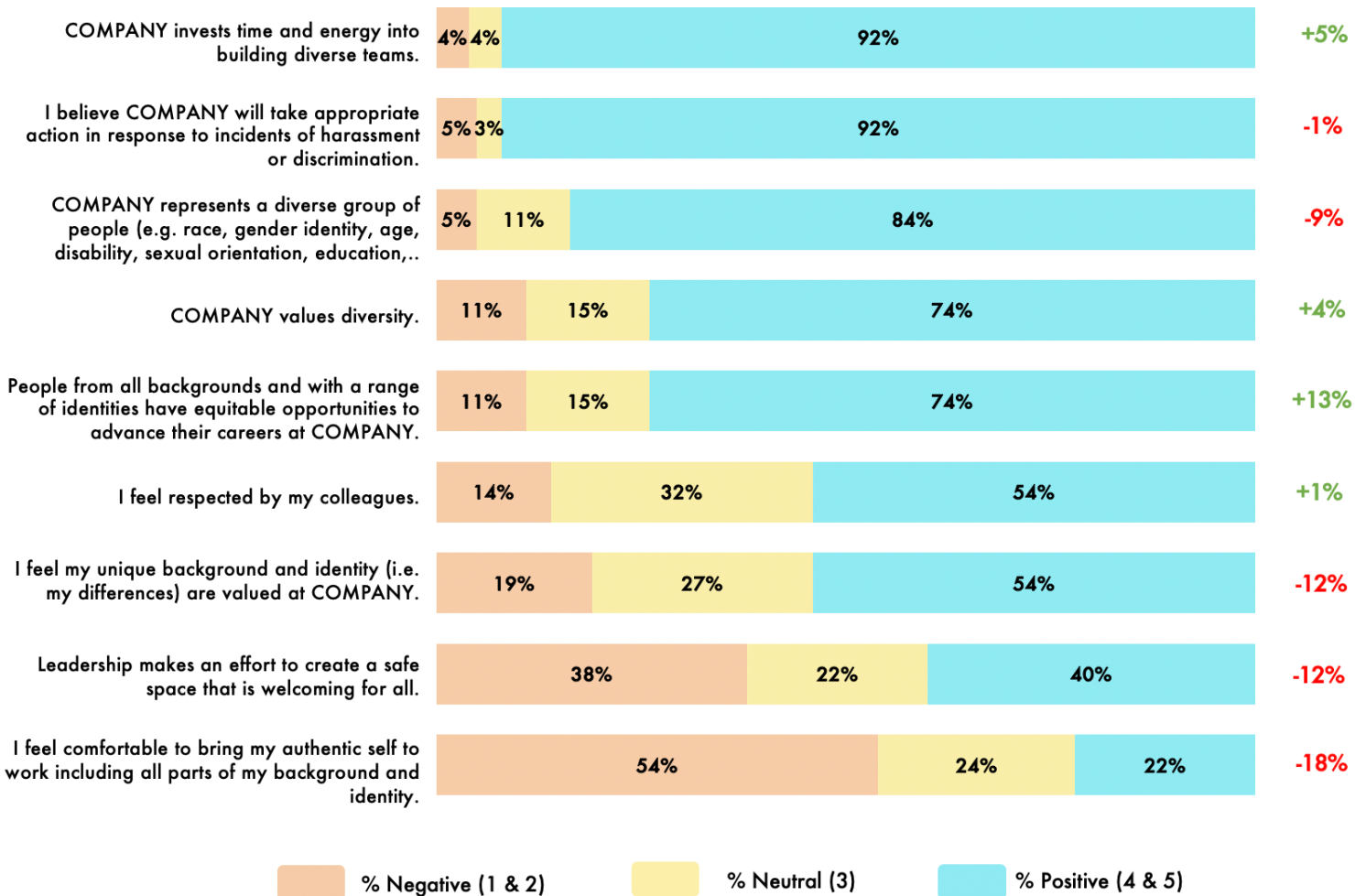
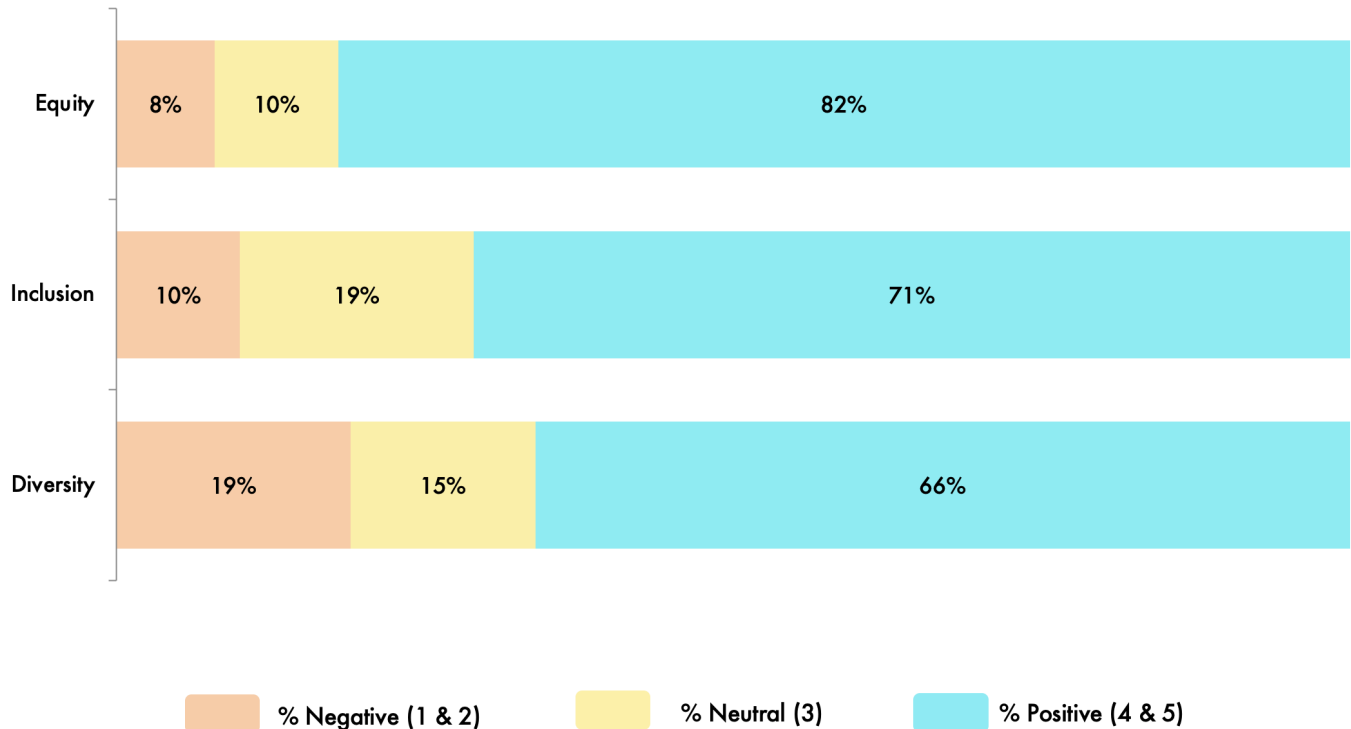


CHART C: DEI Index Comparative lets you see and compare employee sentiment data across the three DEI Indices.



6.3 Compare Employee Sentiments by Region, Leader and Other Attributes

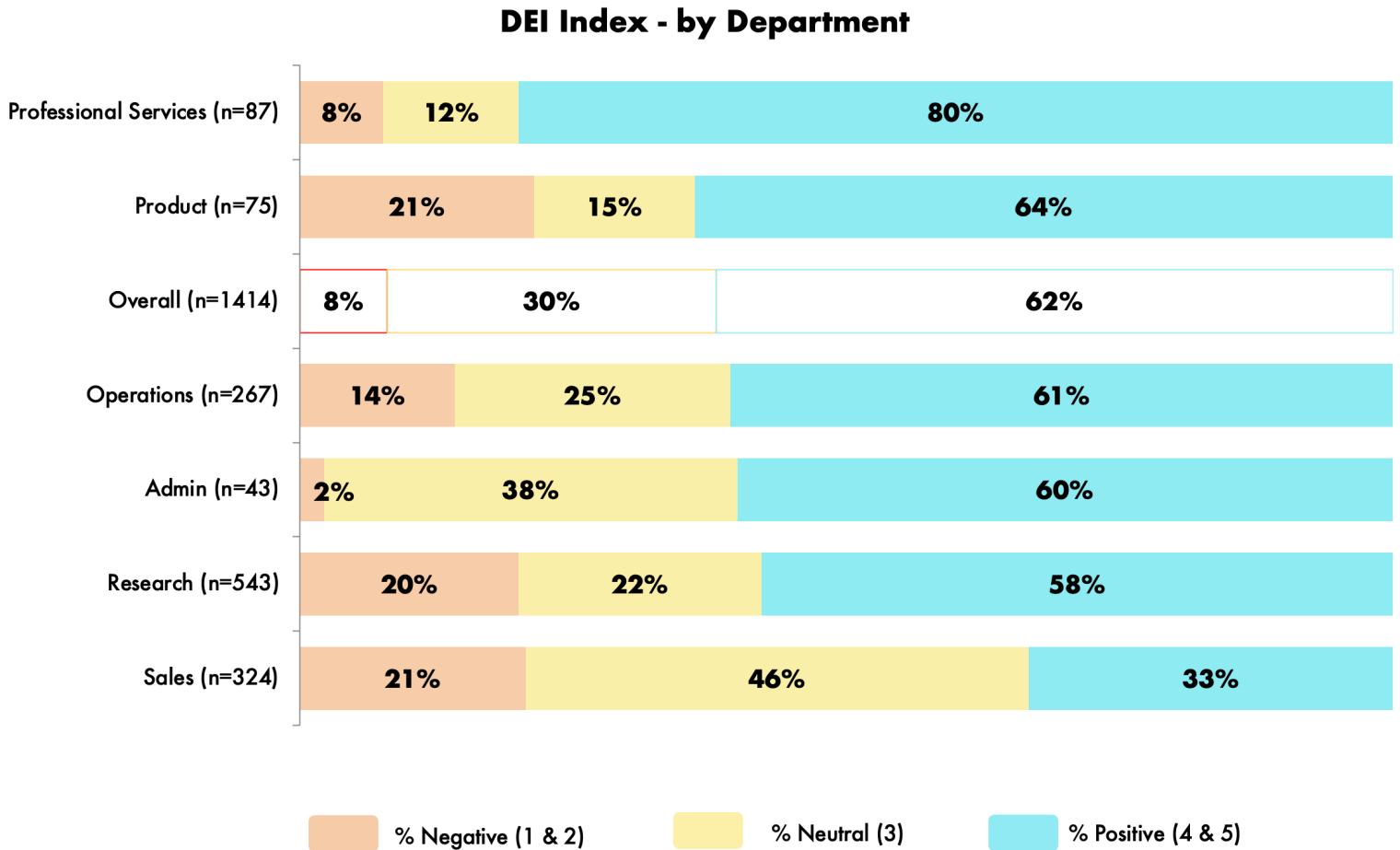
Is anything surfacing by geographic location, department or leader that doesn't seem quite right when compared with the overall company picture? Are there any other aspects or attributes of concern? It's important to check if there's a certain part of the organization where sentiment is very low or noticeably high to unearth and understand troubled areas of the organization.



Remember: anonymity is paramount!

While you can't see individualized responses, you will be able to see which teams or departments or geographic regions have low sentiment in any or all of the three DIVERSITY, EQUITY, or INCLUSION indexes as illustrated in Chart D. Notice how Sales has a lower Diversity Index average than the organization's other divisions, and how Professional Services appears to be doing something right across all three areas.

CHART D: Example of the Three DEI Index Averages by Department/Division



6.4 Compare Employee Demographics by Region, Leader and Other Attributes

Similarly, as Chart E demonstrates, you can also look for differences showing up across the organization specific to the key demographic dimensions you're measuring. You may find data pointing to a leader or department's unconscious bias or outward discrimination influencing hiring decisions. Or tokenism at work (to meet quotas?) with few promotions awarded to marginalized employees.

CHART E: A Look at Diversity Dimensions by Department/Division

	Overall average	Professional Services	Product	Operations	Administration	Research	Field Sales	Marketing	Development
Number of Responses	2842	356	344	432	25	764	54	543	324
Overall average	78	92	70	82	92	67	82	64	73
Diversity	76	92	83	81	92	33	81	72	72
Equity	81	98	85	83	98	85	83	45	71
Inclusion	77	86	43	82	86	84	82	75	75

6.5 Intersectionality

Where insights start to become really interesting, and complex! is when you start to look into factors of intersectionality.

When American law professor Kimberlé Crenshaw coined the term in 1989 it was a relatively obscure legal concept to describe how race, class, gender, and other individual characteristics “intersect” with one another and overlap.⁹

For example:

An African American man is going to experience the world differently than an African American woman. Somebody who is LGBTQ+ is going to experience the world differently than somebody who's heterosexual. Somebody who's LGBTQ+ and Asian is going to experience the world differently than somebody's who's LGBTQ+ and Latinx. It's sort of this common-sense notion that different categories of people have different kinds of experience. The theory's fundamental truth [is] that individuals have individual identities that intersect in ways that impact how they are viewed, understood, and treated.

As if that's not complex enough, social psychologists suggest that each of us has multiple 'identities' connected to the roles we play.¹⁸

Take this example of a senior marketing manager:

Alex is likely to have multiple identities; they're a marketer and a group head, but also a parent, the eldest child of sick parents, a singer in their church Gospel choir and a board member of their local LGBTQ+ theatre company. According to identity theory, when we are in situations that cue a particular identity - when Alex is leading a meeting of their subordinates, their 'group head' self takes over - we behave consistently with the demands of that identity.

Self-assessment pause: *What did you just picture in your mind's eye reading Alex's story? On reflection, was there any kind of unconscious bias?*

How does intersectionality play out in your workplace?

A common example across organizations – DEI aware or not – is looking at Black and/or BIPOC (Black, Indigenous, People of Colour) employees exclusively, or layering socioeconomic status on racial/cultural analysis. Does your organization only hire racialized people from prominent socioeconomic upbringings? As Dr. Crenshaw asserts, intersectionality “is a lens through which we can better understand one another and strive towards a more just future for all.”



6.6 What is Open-Ended Feedback Telling You?

Let's remember insights aren't always quantitative. Qualitative data has huge value when it comes to people expressing what's on their mind. Employee voice isn't just an expression of satisfaction/dissatisfaction. It's about hearing WHY people feel a certain way: real stories, lived employee experiences. And being supportive, understanding, and empathetic in return. Language processing and AI tools make it easier to distil massive amounts of open-ended feedback into clear themes and common concerns.

Positive Comment Keywords	% Prevalence
Equality and respect	12%
Work environment	10%
Diverse workforce	10%
Canada (country)	8%
Change for the better	7%

Positive Comment Keywords	% Prevalence
Lack of action from leadership	13%
Training and communication	8%
Harassment	5%
Belonging/Inclusion	5%
Workplace Policies	5%

6.7 Response Rate Insights

As noted earlier, it's not uncommon for self-identification response rates to start off low - building as trust in the process and stated goals grows. That said, as you look at response rates it may become obvious that certain groups are falling off the trust track - which is an important insight in and of itself.

Phew! That's a lot to be thinking about. And a lot of data to digest. But if you want to pull back the curtain and reveal genuinely transformative insights you've got to be ready to throw on a few more layers to keep the chill of discrimination and its cold undermining associates at bay.

6.8 Where A Lot of Companies Go Wrong

Often times companies want to know how their DEI scores compare with others. Comparative benchmarks measured against other organizations have a place when it comes to employee engagement and contextual performance scores. But when it comes to matters of DEI, comparison of one organization against another doesn't really hold true.



How so?

Well for starters, on the diversity side what you really need and want to know is if your organization reflects the communities where you operate. If, for example, you have offices in a multicultural city like New York or Toronto, but the makeup of your workforce is mostly white, there's a reason for concern. Or if you're operating in a part of the country with a predominantly white population and minimal numbers of people of colour, and your workforce is largely white - but mostly male, from a representation standpoint you need to look at your recruiting efforts related to women. Women after all, comprise 50% of the population. And DEI is about reflecting the community populations where your organization operates, not to mention the people it serves.

Context Matters

The second part of DEI comparatives is the employee sentiment side. Again, the intuitive go-to thing may be to want to compare scores to similar organizations. But that's also flawed because when you look at DEI data, if you don't have a high number of women, or people of colour, or people with disabilities and so on - those all-inclusive overall sentiment scores you'd be using for comparative purposes don't really mean much. Your leaders could look at those sentiment results and think things are great. But the reality is, those overall DEI results are skewed to the makeup of your organization. So, if your workforce is predominantly white males, results will reflect the implicit bias of this population (which, by the way, tends to skew positive).

Implicit bias refers to the attitudes or stereotypes that affect our understanding, actions, and decisions in an unconscious manner.

- Implicit biases are pervasive. Everyone possesses them, even people with avowed commitments to impartiality such as judges.
- Implicit and explicit biases are related but distinct mental constructs. They are not mutually exclusive and may even reinforce each other.
- The implicit associations we hold do not necessarily align with our declared beliefs or even reflect stances we would explicitly endorse.
- We generally tend to hold implicit biases that favor our own ingroup, though research has shown that we can still hold implicit biases against our ingroup.
- Implicit biases are malleable. Our brains are incredibly complex, and the implicit associations that we have formed can be gradually unlearned through a variety of debiasing techniques.²⁹

-Kirwan Institute for the Study of Race & Ethnicity, Ohio State University

What you need to do is to look at the scores of your minority groups. The true story lives with the results from your most marginalized groups.

Now if your number of minorities are so low that they can't be separated out for anonymity purposes, that tells you something right then and there: your organization's need to bring on more marginalized people. Priorities should focus on recruiting to reflect diversity before dealing with sentiment analysis. Your starting point in this kind of scenario is to look at your recruiting practices and then get to hiring in some of that diversity.



"The selection of meaningful diversity and inclusion metrics is an art, rather than a science. Consideration must be given to your business strategy as well as the maturity of your diversity and inclusion program and the specific diversity and inclusion initiatives you are implementing....Regularly measuring progress enables an organization to assess whether it is headed in the right direction towards the achievement of its goals."

- Include-Empower.com

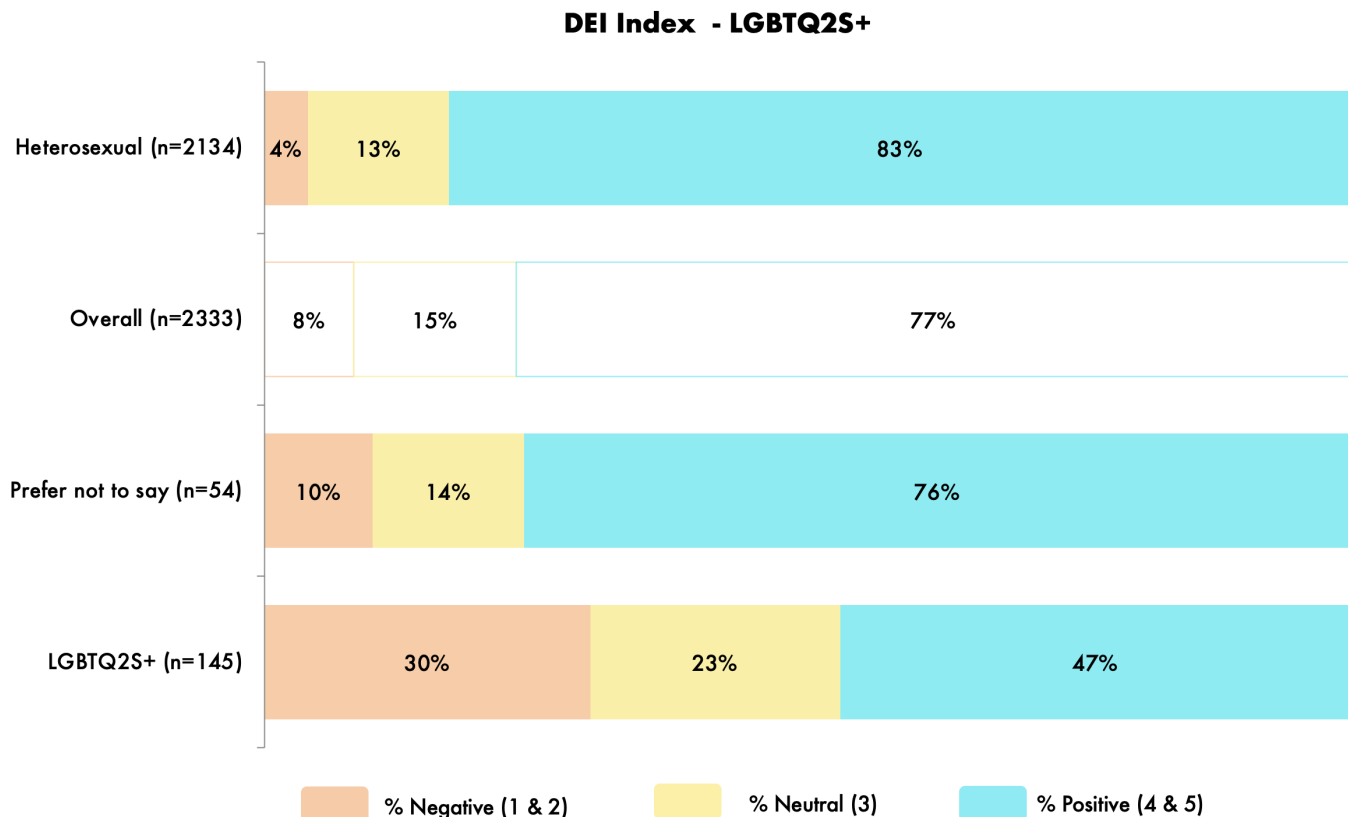
Section 7

Don't Let Your DEI Insights Sit In Isolation Your Data Shouldn't Be Binary

We've seen loads of organizations get A LOT of value out of their practice of measuring DEI. In isolation, **it's good, but layering it on with other data and insights is CRUCIAL in your DEI measurement journey.**

7.1 Overlap and Compare Demographic and Sentiment Results

How do employees based on different demographics respond to different sentiment-oriented statements?

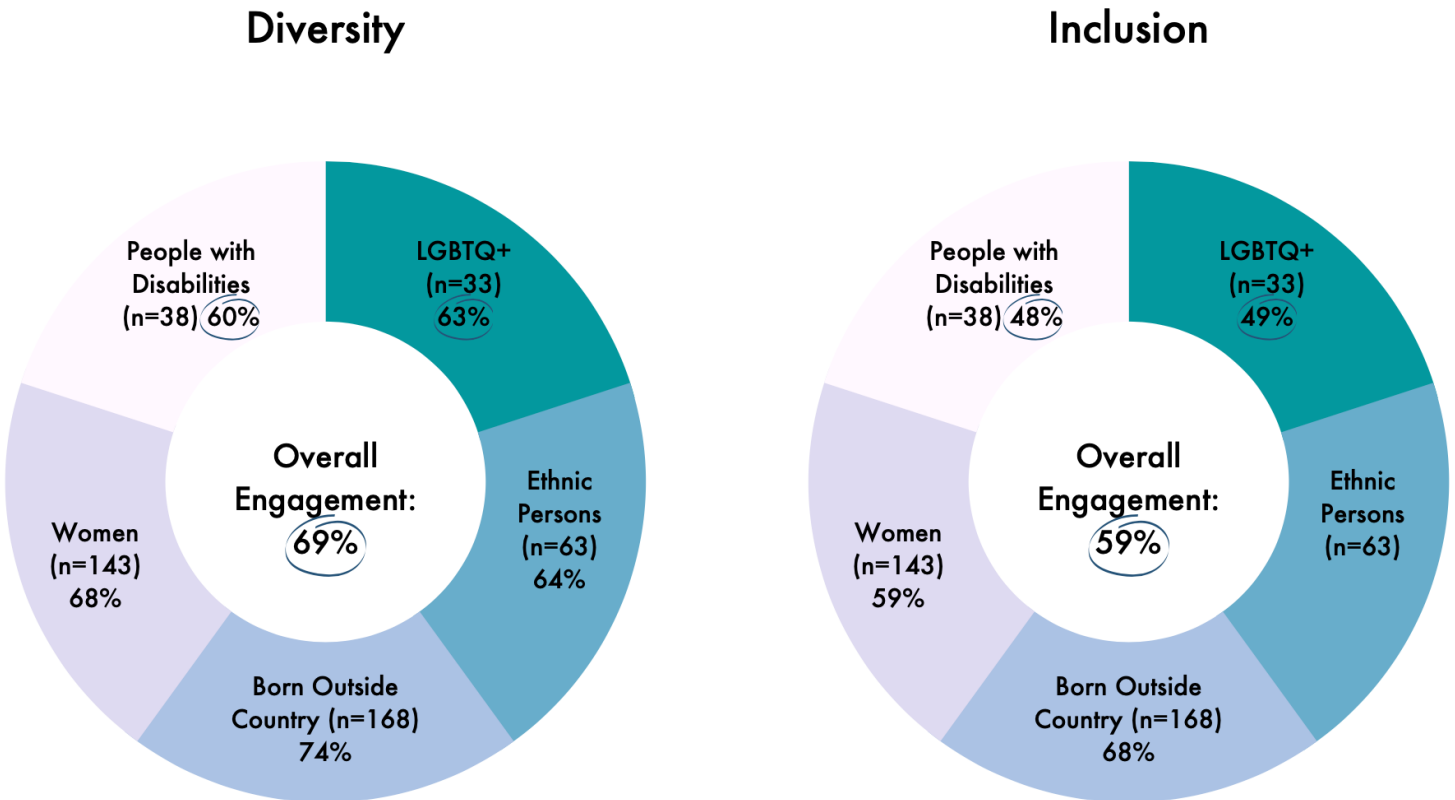


7.2 Layer and Correlate

Overlay findings with workplace experience scores to better understand inclusion and whether people feel they ‘belong’ the same way as their colleagues. Collecting and analyzing this information leads to a deeper understanding of the depth and breadth and complexity of people and how you can better support them. And that’s where the real power lies.

Understanding DEI measurements layered over engagement data, for example, can offer a lot of value. It’s not just knowing what makes up the different diversity dimensions within your organization, it’s also immediately understanding if there’s a certain group or intersectional group that’s less engaged.

Chart F: *Value in Multiple Data Sources* is a great example of layering on insights to see if specific equity seeking groups are lower than the average in engagement.



First off, you can see the average response to Diversity and Inclusion question sets by people with disabilities, LGBTQ+ employees, those who don't speak English, ethnic persons, people born outside of country, and women:

- i) Employed and tabulated as part of the entire organization
- ii) Employed in the specific geographic location of Country A



Secondly you can compare responses:

- i) From group to group within the Diversity Index (across the entire organization)
- ii) From group to group within the Inclusion Index (specific to Country A)
- iii) And by group across both question sets and 'location' parameters

Finally, you can also see how these percentages compare:

- i) With the 'overall' engagement score across the entire organization
- ii) With the country-specific engagement score
- iii) By group individually and collectively

Whittling this down somewhat:

Diversity sentiments indicate 60% of people with disabilities, 63% of LGBTQ+ employees, and 64% of ethnic persons across the organization are below the overall company engagement score of 69%. However, respondents from Country A tell us ethnic employees feel more included and engaged (63%) than the country average (59%) BUT people with disabilities and LGBTQ+ employees are significantly less engaged, registering 48% and 49% respectively. In this scenario it's fair to say inclusionary efforts need to be stepped up in Country A generally to help lift engagement, while increased DEI awareness around people with disabilities and LGBTQ+ employees would be beneficial across the board.

Confused yet?

The secret is knowing how to layer and interpret the data and where to focus attention – because being satisfied with outcomes that reflect majority responses will leave you ignoring clear and telling trends from underrepresented populations.

While protecting privacy, WorkTango can help sufficiently “disaggregate” data to recognize responses by underrepresented individuals (race, gender, abilities, etc.) as well as those who opt not to self-identify. This lets you expand your metrics to include insights like:

- What **retention** looks like for underrepresented groups as well as understanding the numbers and reasons for voluntary and involuntary departures.
- What **promotion rates and compensation** (and bonuses) look like for these groups.

7.3 Summarize Your Data!

It's a lot to absorb, but once you've looked and layered and assessed we recommended you highlight the key 3-6 insights the data is sharing. This list of priority findings will guide strategic next steps.

Key Insights and Summary of Findings



Although feedback was positive overall, there was a common theme of employees being unaware of any DEI work internally or within the community



Your DEI Index is 78% - with little variance across all countries. A 5% increase from 2019.



Only 4% of respondents identified as BIPOC



18% of respondents identified experiencing discrimination - with over 80% of that group stating they did not report it.



Over half (56%) of LGBTQ2S+ respondents have experienced unwelcomed and harassing comments



13% of respondents identified as non-binary for Gender Identity; 11% of respondents identity as a person with a disability

7.4 Finally, Don't Make this an Annual Event

With so many variables to choose from it takes time for employees to fill out Demographic Dimensions, making it a longer survey process than usual. However great companies are measuring and actively listening to employees more frequently with shorter pulse surveys.

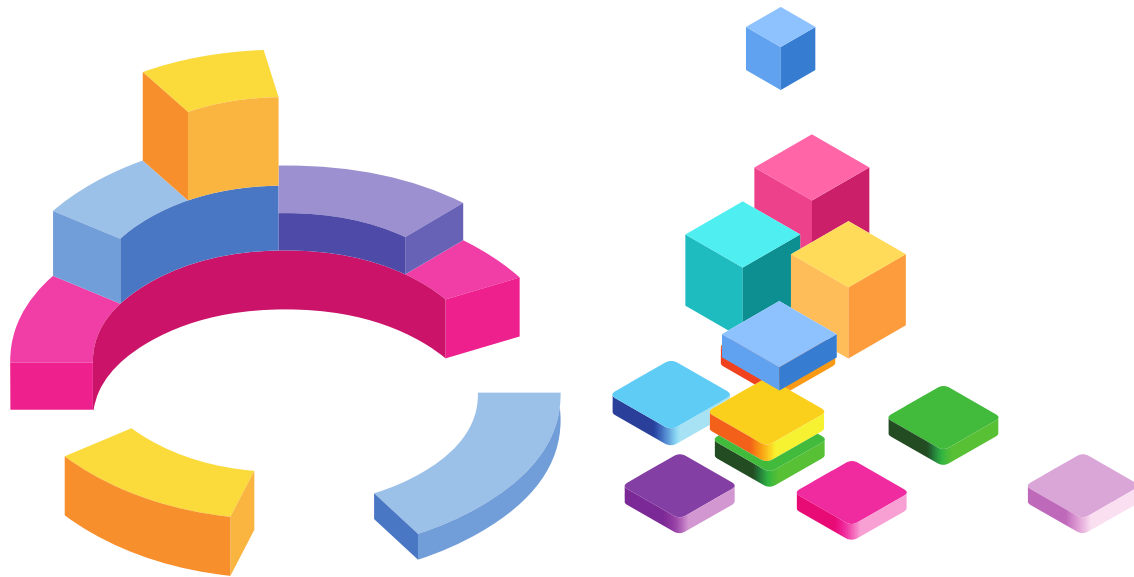
- Frequent pulse surveys deliver the ability to be agile by letting you see and understand employee sentiments and trends in real-time.
- They give DEI/HR executives the ability to track the impact of DEI initiatives in real-time.
- And most importantly they hold leaders responsible. (It's easy to ignore issues when there isn't another check-in or measurement for a full year, right?) But with more frequent measurement leaders tend to be more accountable, tend to actively listen, respond, monitor, review, modify and repeat. And that's how barriers are removed and an authentic and measurable commitment to Diversity, Equity, and Inclusion prevails.

Co-craft your DEI culture through ongoing inclusionary measures. Frequent climate surveys are something WorkTango's team can support you with - alongside other tips and tools.

Section 8

Employee Sentiment Doesn't End at Surveys

Creating a sense of involvement and belonging goes beyond deploying surveys and collecting data.

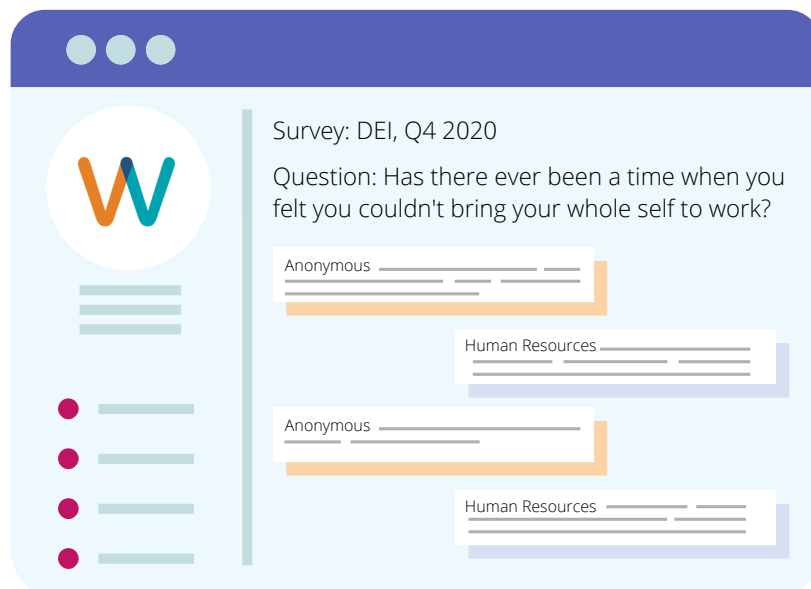


- 1) **Get Context** – understand sentiment of employees
- 2) **Make Change** – respond and act based on feedback
- 3) **Measure Impact** – see the impact of your actions toward a more diverse, inclusive and equitable workforce

8.1 Confidential Conversations

If you want to step up and modernize your approach, try Confidential Conversations. This unique tool aligns with giving managers access to their employee feedback. Embedded in WorkTango's Active Listening platform, a manager can express uncertainty or concern about a respondent's open-ended comment and request more clarity (while still protecting the individual's confidentiality!). It's part of a framework that fosters two-way discussion and lifts employee sentiment – all in the name of digging deeper to learn.

Chart G: Example of Confidential Conversations



8.2 Exploratory Conversations

Curated survey data – analysed and compartmentalized into conceptual themes and areas of focus – greatly support and allow you to have deeper exploratory conversations via the likes of focus groups, steering committees and workshops. But the beauty is *that you're not going into conversations with assumptions, you're going in to clarify and understand why parts or the whole organization feels the way it feels.*

Surveys are your springboard to delve into the policies and procedures, practices and people prohibiting progress and impacting the lived employee experience; to get the insights needed for action.

Section 9

Now It's Time to Act

Armed with layers of insight it's now possible to have context, make change, and more importantly track your progress in building a more diverse, equitable and inclusive workplace. An inspirational example of a company that's doing just that is Seattle-based java giant, Starbucks.

Back in 2018 the coffee shop chain closed more than 8,000 U.S. cafes for an afternoon and walked 175,000 employees through a racial bias training program. It wasn't a solution, but a first step. There have been missteps along the way to be sure, including a scandal in mid-2020 that saw the company reverse an initial position that prohibited employees from wearing Black Lives Matter branded clothing and accessories. But in the few months since, Starbucks has announced that it's:^{20,21}

- Linking executive compensation to (DEI) goals beginning in the 2021 fiscal year
- Launching an Inclusion and Diversity Executive Council
- Sharing workforce diversity data "in more detail than previously shared
- Making its filings with the Equal Employment Opportunity Commission public
- Establishing a leadership mentoring program
- Achieving a goal of Black, Indigenous, and People of Color representation of at least 30% at all corporate levels and at least 40% at all retail and manufacturing roles by 2025.

According to a piece published on HRDive, Starbucks also plans to partner with professional organizations that specialize in facilitating development. Anti-bias content will be included in hiring, development and performance assessment toolkits. The company will invest in recognition and development programs for its employee resource groups – Black Partner Network, Hora Del Café, India Partner Network, Indigenous Partner Network and Pan-Asian Partner Network. And an Inclusion and Diversity Virtual Leadership Summit scheduled for the second quarter of FY21 will also be part of the initiative.



That's an aggressive DEI journey for an enterprise that found itself on the international hotseat some 24 months ago (give or take) when a Philadelphia store manager racially profiled two Black customers. And it's captained by a CEO, Kevin Johnson, who asserts "Starbucks has the responsibility to lead by example and will implement transparency and accountability to meet its commitment."

Establishing supportive governance, policies and procedures is something all business leaders need to get behind. DEI survey insights crack open the window, demonstrable actions throw open the sashes and let in the fresh air. Some of those fresh air thinking actions, shared by executives participating in the PwC survey, include:

- Leaders communicating regularly about Diversity, Equity, and Inclusion as part of broader discussions about business priorities and results
- Holding leaders accountable for DEI results
- Housing oversight with senior leadership and the Board of Directors
- Executing the DEI strategy across all elements of your business and talent ecosystem
- Embedding a diversity lens into talent management, training, and supply chain operations and programs
- Embracing a broad definition of diversity that focuses on inclusion of all differences

A DEI Survey isn't a One and Done Approach

... it should be embedded into your employee listening strategy moving forward to create accountability and drive continuous change.

Improving the lived experience of your employees starts with really knowing who they are, what they think, and how they feel. Uncovering issues of exclusion, discrimination, and harassment. And building the pathways that lead to an environment of respect, of equity, of belonging.

"There's not one training or a single program — there's no silver bullet. This is a 10- to 20-year problem, you can't solve structural racism by throwing together a year-long program with a few targets. It's about taking a step back to rethink how you engage with your people and how you respond to their experiences."

- Aubrey Blanche,
Global Head of Diversity & Belonging, Atlassian



At WorkTango, our Passion Statement is to improve (work) lives. We do purposeful work around not only measuring DEI and the employee voice across the ENTIRE work cycle, but also around recommending and supporting policy change, leadership enablement, and ultimately impacting behaviour change in organizations. When it comes to assessments and supporting organizations to act, our approach is also diverse. We're proud that this educational guide was developed collectively by a multi-faceted group of WorkTango employees, partners, and community members.

Dr. Sarah Saska is WorkTango's key advisor and expert on DEI and the co-founder and CEO of Feminuity. She is a seasoned academic and experienced practitioner, drawing on data to identify areas of bias, inequity, and cultural challenges within organizations and pairing this with evidence-based strategies to align good intentions with meaningful and long-term impact.

Feminuity is a full-service consulting firm helping companies build diverse teams, equitable systems, and inclusive products and workplace cultures. Since 2014, Feminuity has supported start ups through to leading Fortune 500 companies to embed Diversity, Equity, and Inclusion into the core of their business. For Dr. Saska and colleagues, diversity isn't a numbers game, it's a core value. Equity isn't a one-off initiative, it's an intentional design choice. And inclusion isn't a fleeting emotion, it's a culture.

If you are interested in learning more about our DEI model, questions or approach, email us at stephen@worktango.com



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