Using engagement surveys to provide deep insight into Diversity and Inclusion

Agenda **consulting**

The business case for Diversity and Inclusion

Many countries have equality legislation which requires employers to make their workplaces a fair environment for all their staff. For example, in the UK the following are defined as protected characteristics:

- Age
- Disability
- Gender reassignment

- Marriage/civil partnership
- Pregnancy/maternity
- Race

- Religion/belief
- Sex
- Sexual orientation

> *"An inclusive organisation enables all of its people to fully participate in and shape the collective, e.g., by supporting people to be themselves and to speak out about concerns and to be heard."*
>
> **Home Truths** - Undoing racism and delivering real diversity in the charity sector, ACEVO June 2020

Many organisations also see a strong business case for Diversity and Inclusion as set out in the table below.

The benefits of Diversity and Inclusion

For your people	For your organisation
A fair workplace	Able to attract and retain people with the best talent and skills
Where everyone can contribute and is valued	Enriched by diverse perspectives
With high standards of conduct	Greater insight and connection to communities the organisation works with
Where people in particular groups are not disadvantaged or excluded	More innovative and future oriented
Where everyone can do their best work	

Whether driven by the pressure to be consistent with legislation or the imperative to enhance organisational effectiveness, Diversity and Inclusion is now an issue which organisations cannot ignore.

Reflecting on Diversity and Inclusion

It is easy to have the desire to be an inclusive organisation but harder to achieve it. In order to identify the drivers and barriers to becoming an inclusive organisation, leaders may find some of the following questions useful to explore.

Diversity
Is our organisation reflective of the communities we serve?
Is our organisation reflective of the community(ies) where we are based?
Why is including diverse people important in our organisation?
Is our organisation equally diverse in senior and less senior roles?
What does our organisation's diversity or lack of it say about the organisation?
Is our diversity consistent with our values?
Does our diversity allow us to fulfil our mission?

Inclusion
Do some groups feel that they are treated less favourably than others?
Do all minority groups feel welcome and included?
Do people feel that they can be open about who they are and be accepted?
Do any groups face "glass ceilings"?
Is there unacceptable behaviour happening within our organisation?
Is our organisation open to being challenged by those who do not feel included?
Is it the same in all parts of our organisation or just particular parts?

Analysis and moving forward
How can we move forward to create a more diverse workforce?
How can we create a more inclusive workforce?

In thinking about these questions, recognise that this is cultural change and as such will require determination from senior leaders, moving forward step by step over a number of years.

How surveys can provide deep insight

A survey is a great way to understand more about the experience of everyone working at an organisation, including those in minorities and those whose voice may not often be heard. Disaggregating the results of a survey to see the differences between the experiences of different groups allows organisations to better understand what needs to be addressed to make the organisation an inclusive place to work.

Advantages of a survey approach

Features
Invite everyone to take part
Give people an equal say
Provide a safe space for people to give honest feedback
Use a full set of demographic questions
Analyse the results by demographic to understand if there are groups with a different experience
Feedback to senior leaders and managers

Benefits
Take an evidence-based approach
Avoid perceptions of "box-ticking" or "jumping on a band wagon"
Helps to identify any problem behaviours
Helps to identify what the issues are and where they are
Track change over time

In our experience, including a good set of demographic questions in the survey enables organisations to disaggregate results and identify differences between groups of people. This can help provide a better understanding of how people in minority or disadvantaged groups feel about the organisation.

Annex A contains a number of personal demographic questions which we would encourage organisations to consider. Annex B contains some specific Diversity and Inclusion questions we often use.

In addition, organisations will wish to include questions on the individual's department, role, length of service and contract.

Recognise that under GDPR any data collected on ethnicity, sexual orientation, disability and religion/faith/belief is designated Special Category data. This means that data collection cannot be mandated and there must be a "prefer not to say" option for respondents.

Organisations will wish to ensure confidentiality for respondents. A common approach is to set a minimum number of responses, for example 5 or 7, for reporting purposes. An implication of this is that it may not be possible to report on those demographic groups with fewer responses than the minimum.

Is a focused survey needed?

Some organisations use their existing engagement surveys for Diversity and Inclusion whilst other organisations like to augment their engagement survey with a survey more focussed on Diversity and Inclusion.

We set out below the features and advantages of the two options.

	Use existing Engagement Survey	Introduce a focussed survey on D&I
Features	Wide range of topics covered	Fuller set of questions on D&I including questions on how current initiatives are landing
	Consider including a few questions on D&I and Respectful Workplace	May wish also to include questions on respectful workplace and culture
	Ensure that demographic questions are designed to capture the diversity dimensions you wish to understand	Use open questions to focus on D&I
Advantages	No additional cost – makes the most of your existing engagement survey	More in-depth analysis of D&I enabling greater insight
	Provides a broad helicopter picture of how different groups experience your organisation and where the D&I issues are	Signals that D&I is a priority and keeps profile high within your organisation
	A good starting point	Useful once the D&I programme is established

In summary:

- Using your existing engagement survey may be a very good place to start – the key is to ensure that the demographic questions in the survey are designed in relation to the dimensions of Diversity and Inclusion that you wish to explore

- A more focused Diversity and Inclusion survey will allow you to go into more depth and may be suitable once your Diversity and Inclusion programme is established.

Annex A demographic questions

We set out below example typologies for a number of personal demographic questions.

U.K Ethnicity

Ethnicity level 1 (ONS)
Asian or Asian British
Black or Black British
Mixed and Dual Heritage
White or White British
Other Ethnic Group

Ethnicity level 2 (ONS)
Asian or Asian British: Indian
Asian or Asian British: Bangladeshi
Asian or Asian British: Pakistani
Asian or Asian British: Chinese
Asian or Asian British: Other
Black or Black British: Caribbean
Black or Black British: African
Black or Black British: Other
Mixed: White and Black Caribbean
Mixed: White and Black African
Mixed: Other
White: British
White: Irish
White: Other
Other Ethnic Group

Global Ethnicity

Ethnicity
Black (origins in Sub-Saharan Africa or the groups of the Black African Diaspora, e.g., Afro-Caribbean, Afro-Latino, Afro-European, or African American)
Central Asian (origins in Central Asia or Caucasus)
East Asian (e.g., origins in Japan, China, Korea)
Indigenous or native peoples (origins in any of the original peoples of the Americas, Asia, Europe, or the Pacific; also considered First Nations or aboriginals)
Latino/a or Hispanic (origins in Latin American or Spanish-speaking countries)
North African/Middle Eastern
South Asian (origins in the Indian sub-continent)
South East Asian (e.g., origins in Thailand, Indonesia, Philippines)
White (origins in any of the original peoples of Europe)
Multi-racial (identify with two or more ethnicities)
Other

In your country of work, do you consider that you are a member of a marginalised group in relation to your race, ethnicity or caste?
Yes
No

Sexual orientation and identity

Sexual orientation (Stonewall)
Bi
Gay man
Gay woman/Lesbian
Heterosexual/Straight
Prefer to self-describe

Which of the following best describes your gender identity?
Male
Female
Identify in some other way

Do you identify as trans (Stonewall)
Yes
No

Religion, faith or belief

Religion, faith or belief (ONS)
Atheist
Buddhist
Christian
Hindu
Jewish
Muslim
Sikh
Other

Disability and caring responsibilities

Do you consider yourself to have a disability?
Yes
No

Do you have any caring responsibilities for any children under the age of 18?
Yes
No

Do you have any caring responsibilities for anyone over the age of 18?
Yes
No

Annex B Diversity and Inclusion focused survey questions

Below are some questions from Agenda's bank of statement questions that we suggest could be used in a Diversity and Inclusion survey.

People here are treated equally irrespective of ethnicity, gender, disability, age, sexual orientation or religion
This organisation values diversity
The Leadership group demonstrates their commitment to Gender D&I
My manager actively supports and takes responsibility for promoting gender equality, D&I in the workplace
In my team, I am encouraged to be sensitive to gender equality, D&I, in terms of my actions, my behaviour and my language
This organisation is committed to promoting representation of people from diverse groups at senior levels
The organisation works to attract, develop and retain people with diverse backgrounds
This organisation has a culture that nurtures and encourages those from an under-represented group to pursue their chosen career
I feel that I belong in this organisation
I feel there are as many opportunities for me to succeed in this organisation as there are for my peers
My organisation is committed to D&I and values the different perspectives, experiences, backgrounds, knowledge and approaches of all its staff

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- Volunteer Engagement
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