Collecting Demographic Data

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Who should I collect data from, and when?

Start with employees and applicants. Then expand.

Collecting data on employees will allow you to evaluate whether discrepancies in advancement exist, if pay is equitable, and/or whether employees across demographic groups feel similarly about the culture. Collecting data on applicants will allow you to monitor for discrepancies in candidate success.

While it's critical to start by collecting demographic data from employees and prospective employees, your organization likely reaches other populations (e.g., customers, clients, vendors, patients, students, volunteers, grantees, etc.). Collecting data on these external groups will allow you to evaluate the impact of your product or service across demographic groups, and/or determine if your brand resonates similarly across demographic groups.

Use existing systems and easy touchpoints.

Collect demographic data within existing systems where possible (e.g., your HR Information System, your Applicant Tracking System, and/or your Customer Relationship Management System). This makes it easier to analyze outcomes (e.g., promotion, pay, engagement) by demographic group.

When collecting demographic data, use easy touchpoints like onboarding, the application process, or customer sign up to build a robust dataset. Make demographic data collection voluntary and make sure your collection methods account for the different ways one might enter a data system (for example, directly applying via the career page vs. being sourced from an event). For employees or customers that have been with the organization for a long time, allow them to update their demographic data when they want to. Self-identification campaigns can also be used to quickly collect demographic data (especially if a lot is missing); however, regular touchpoints help ensure the dataset does not become outdated when new employees join the organization.

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What should I collect?

Diversity is the variety of visible, invisible, inherited, attained, or chosen characteristics within a group. These characteristics include but are not limited to:

- Race/ethnicity
- Gender
- Sexual Orientation
- Disability Status
- Veteran Status
- Trans Status
- Caregiver Status

- Socioeconomic Status
- Immigration Status
- Educational Background
- Religious Identity
- Political Identity
- Regional Affiliation
- Dietary Preferences

We recommend collecting data on characteristics that are associated with documented discrimination or substantial inequality of outcomes and/or could inform organizational policy (accommodations, holidays, insurance plans).

There is often a tension between asking too few questions (which can limit the ability to monitor the experiences of certain demographic groups) and asking too many questions (which can fatigue people, raise concerns about privacy, and/or reduce response rates).

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What options should I provide?

When collecting demographic data, your goals should be to capture as much accurate, usable data as possible while creating an inclusive experience during data collection. These may occasionally be in tension and your job will be to navigate this tension by drawing on evidence and feedback. When collecting demographic data:

- Stay aware of research and discussion: Because the categories we use to self-identify are social and political, they are constantly changing. Staying aware of research will allow you to capture accurate and complete data. Further, staying aware of public dialogue on how individual identities and terminology are shifting will allow you to offer relevant options.

- Expect and accept feedback: You should expect that not all parts of your demographic data collection approach will land well. Usually, you will receive feedback related to whether your data collection created an inclusive experience; it is possible to hear that the same approach made some individuals feel included, and others not. Consider whether acting on this feedback will jeopardize your ability to capture as much accurate, usable data as possible. If it does, consider how widespread the feedback is.

- Choose open and close ended options: One challenge with giving a list of options is that the list will not be exhaustive. Using open-ended questions can help address this challenge, but in order for this data to be useful, it needs to be manually categorized on the back end. Instead, have individuals self-categorize from a carefully curated list of options with one open-ended option for those whose identity is not captured within the list. If feasible, consider adding follow-up, open-ended questions (e.g., "You said you identify as Asian, please tell us more") to allow for both self-categorization and the flexibility to identify in ways that might not be captured by close-ended options.

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What options should I provide? (continued)

- **Strike a balance between too many and too few options:** It may be tempting to list <u>all</u> possible options to avoid excluding particular identities, but like with open-ended options, you run the risk of having too many options that need to be categorized on the back end. A simple and concise form should be the goal: Research shows that more options, and the more complex question the questions, the more likely people make errors, make inconsistent choices, and/or choose to not respond all together.

- **Avoid the word "other":** Instead of "other" as a catch all for individuals who don't fit into the list of options, try: "My sexual orientation/gender identity/etc. is not listed above, it is: (open-ended)".

- **Leverage employees:** Employees or employee groups (like ERGs) can be a great testing ground and opportunity to gather feedback. Share your goals of collecting accurate, usable data in as inclusive a way as possible, and ask for feedback on how the options you provide resonate with them.

- **Use data collection as an educational opportunity:** There are some identities that may not be familiar to individuals you are seeking data from. By listing more exhaustive options (for gender, for example) and linking to relevant resources that explain these options, you can educate employees while collecting comprehensive data.

- **Be mindful of reporting requirements:** You should always ensure that the options you create can be used for state/federal reporting purposes. While those state/federal options may be limited, many clients create a "key" or "map" to translate their more expansive options into the options required by local or federal law.

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Sample Demographic Questions

Which racial and/or ethnic category best describes you?*

- Asian (for example Chinese, Filipino, Indian, Vietnamese, Korean, Japanese, etc.)
- Black or African American (for example African American, Jamaican, Haitian, Nigerian, Ethiopian, Somali, etc.)
- White (for example German, Irish, English, Italian, Polish, French, etc.)
- Hispanic or Latinx (for example Mexican, Puerto Rican, Cuban, Salvadoran, Dominican, Colombian, etc.)
- Middle Eastern or North African (for example Lebanese, Iranian, Egyptian, Syrian, Moroccan, Algerian, etc.)
- Multiracial (for example bi-racial or mixed race)
- Native American or Alaskan Native (for example Navajo Nation, Blackfeet Tribe, Mayan, Aztec, etc.)
- Native Hawaiian or Other Pacific Islander (for example Native Hawaiian, Samoan, Chamorro, Tongan, Fijian, Marshallese, etc.)
- My race/ethnicity is not listed above. It is:

* The categories listed in the examples represent the sub-groups with the largest proportion of the total US population reported in the 2010 Census.

Which gender identity best describes you?

- Agender
- Genderqueer or genderfluid
- Non-binary
- Man
- Woman
- My gender identity is not listed above. It is:

Do you identify as transgender?

- Yes
- No
- I don't know

Which sexual orientation best describes you?

- Asexual
- Bisexual
- Gay
- Heterosexual
- Lesbian
- Pansexual
- Queer
- My sexual orientation is not listed above. It is:

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What do I communicate when collecting data?

Collecting demographic data is an opportunity to remind employees about the value that data brings, and tie data collection to broader DEI strategy. When collecting data, it's imperative to establish trust and provide a space for employees to ask questions.

Explain how the data will and will not be used

For example, you could say that you will use this data to monitor for equity in key people processes (e.g., hiring, promotions, attrition) but that the data will only be analyzed in aggregate.

Connect data collection efforts to your DEI strategy and goals

For example, share how collecting employee data will help the organization monitor progress on key initiatives, and promote inclusion and equity.

Attempt to alleviate concerns around privacy

For example, share that submitting data is voluntary and be clear about which individuals/teams will have access to the data. Include an individual or an email alias that employees can use to ask questions or surface concerns.

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How do I collect data globally?

Demographic data collection is complex in a global organization. Consider the following strategies:

Take a global <u>and</u> a local approach

There's a tension between asking questions that will allow you to analyze data and surface insights globally vs. asking questions that will resonate locally. For example, a question like, "Are you a racial/ethnic minority in your office?" may well work across regions but doesn't allow for much granularity. You may consider doing both; for example, providing local race/ethnicity options while also asking a more broad and globally relevant question like the example above.

Work with local experts

Consult with local employees or employee groups, regional DEI experts, and/or lawyers as you consider global demographic data collection. Local laws may dictate what you can and cannot ask, and regional politics may make some questions more sensitive than others. Learning from experts "on the ground" will help you avoid pitfalls.

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