

6 Tips for Using Surveys to Launch Your DEI Effort

By William (Bill) Shackelford



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Introduction

Amidst all of the challenges the workplace has experienced this year, diversity, equity and inclusion (DEI) has emerged as one of the most pressing issues. Although it has long been recognized as an issue, the events of this year have catapulted it to the top of the list for many organizations. The **2020 PwC Global Diversity & Inclusion Survey** had an all-time high of 76% of the respondents indicate that DEI "...is a priority or value" of their organization".

From Priority to Strategy

Even in organizations that have embraced DEI they often struggle with implementing effective DEI strategies. In the same PwC survey, one-third of the respondents still see DEI as a barrier to individual and organizational success.

I have devoted the last 30 years of my consulting career to helping public and private sector organizations implement transformational DEI programs. I've seen organizations succeed greatly and others fail spectacularly. The difference often came down to the ability of the DEI program to provide decision-makers comprehensive, trusted and current data. It is data (not training) that lays the foundation for DEI success. The most common source for the data is the employee survey. However, all surveys are not equal.

How Do DEI Surveys Help Organizations?

The employee survey is a process that takes the "temperature" or "pulse" of the organization. Surveys are used to develop an understanding of employee attitudes and perceptions about the organization. Also, they are useful tools for gauging employee reactions to recent changes in the organization or its business.

Tips for Launching Your DEI Survey

With our nation experiencing a renewed awareness and sensitivity to DEI issues, every organization should be thinking about updating the data they are using to define the current state of DEI in their organization. Here are some tips to keep in mind if administering an employee survey will be a part of your plan to profile your culture.

1. Weigh the pros and cons of doing the survey in-house.

Some of the most spectacular failures we have witnessed have been when organizations attempted to develop and launch their own DEI survey using one of the free or inexpensive survey tools. They see this approach as a way to save money while still generating the data they need. However, they fail to realize that creating surveys, especially DEI surveys, is far from simple. It's actually rooted in science, with a whole field of PhD's researching and studying how to create questions and surveys that provide accurate, reliable and non-misleading answers. Having general survey experience is just not a strong enough foundation for DEI survey development ... for several reasons.

- **You need an in-depth understanding of DEI issues.** Because DEI is so encompassing, researchers have worked hard to identify categories of issues to explore to best assess DEI in organizations. When organizations "guess" about what they think should be on their

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survey, they often miss issues that are having a greater impact on employee satisfaction than those included on their survey.

- **How you ask the questions is just as important as what you ask.** A multiple choice question that asks, “Are you getting clear information from your manager and is it helpful?”, may sound like a good question. However, how do you respond to the question if the information you get from your manager is clear but not helpful? You won’t know your employees were confused by the question until after the data is collected and, then, it’s too late.
- **Free surveys may not provide the real data you need.** The free and inexpensive survey tools will provide results for all survey respondents. However, if you cannot analyze the data by demographic groups (race, gender, generation, job function, location, etc.), conclusions drawn from the data about the level of employee satisfaction may, at best, be misleading; and, in the worst case, may fail to identify dissatisfaction within the very demographic groups you are most concerned about. For example, if 80% of your leaders are male and 80% of your employees are male, you may have a very high positive response to the question, “Are you satisfied with the representation of your group in management?”. If you are not able to break this data down by gender you may miss the fact that women may not be nearly as satisfied as men.
- **Developing your own survey can delay DEI action.** The average organization will take 6-12 months to: research, design, develop and launch their in-house-developed survey; collect and analyze the resulting data; and report the findings. While you are waiting on the data, critical actions by the DEI program will be on hold. This is precious time lost and may result in your losing the momentum and commitment you worked hard to build.

The good news is that technology advances have brought the cost of doing advanced analytics with your survey data down to a point where most any organization can afford it. You would be amazed at the variety of reporting options available to you today for what you probably paid a few years ago for a very basic survey.

2. Be clear about your data needs.

The goal of any DEI survey is to provide insights into the culture of the organization and how different employees perceive the culture. The clearer you are about your data needs, the better the survey will be able to serve your immediate and long-term needs. Think about it this way, a year from now you cannot benchmark a question you should have asked but did not. Here are a few requirements you should consider.

- **Determine in which demographic groups you expect to find divergent opinions about your organizational culture.** Is it gender, race, generations, location, tenure, job function or all of the above and more? To properly explore these differences, your survey process will need to be able to segregate and report survey data for each of these groups.
- **Ask yourself the question, “What organizational policies, procedures or cultural norms do you suspect employees will have concerns?”** will that include concerns about leadership, management style, equity, fairness, upward mobility, teamwork, communication or other issues? If so, then, each of these issues must be explored on the survey you use. Also, the

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survey should include other standard/typical DEI issues identified by research (which is why advice from DEI experts is so important).

- **Consider whether the survey data will be integrated with other data.** Will your survey be a stand-alone instrument and provide all of the data needed to guide the DEI change process? Or, will it be one of several data sources (e.g. combined with focus groups, individual interviews, a review of policies/procedures)? If the survey data is to be integrated with other data, you need to use a survey tool that will make that integration easy.
- **Decide whether you want to provide each manager with survey results.** The more advanced survey tools will allow each manager to receive survey results for their workgroup and compare them to the results for all employees. In addition, it will allow your organization to compare the results between workgroups to more clearly pinpoint areas where change/training is needed.

3. Do your homework/research before launching.

If you plan to use an external survey provider, make sure you do a broad search. There are so many seemingly new survey providers in the marketplace today that a search conducted a few years ago would not have found. Actually, many of these seemingly new companies have been in the survey business for a while. New advances in survey technology have greatly reduced the cost of providing advanced survey analytics. This has allowed these companies to provide cost-effective survey solutions that can compete with better known but less feature-rich platforms.

4. Develop a clear understanding of the features needed from your survey provider.

One of the most impactful decisions you will have to make is matching the features of your survey provider to your survey needs. Important features to consider include:

- **Ease of Use** – Can the survey be managed by your in-house team with limited support from your survey provider?
- **Cost/employee** – What is the basic cost/person to administer the survey and report the results; and does that basic price include all of your required and desired features?
- **Standard Survey** – Do the questions on the provider's survey adequately assess the DEI issues identified as important in your organization and has the survey been reliability tested?
- **Customization** – Can the language of the provider's survey be easily customized to fit the language of your organization and can you add open-ended questions?
- **Time (from contract signing to launch)** – How much time will it take to develop (or customize) the survey, code the survey for distribution and test the survey before launch?
- **Reporting Capabilities** – Will the survey platform make it easy for you to provide your leaders and employees reports that inspire them to action? Specifically, reports that are:
 - Easy to understand
 - Visually appealing
 - Built on standard templates
 - Actionable
 - Multi-level (e.g. Executive Summary, Organization-wide, Work Group Specific)
 - Available by demographic group (by Race, Gender, Division, Location, etc.)

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- Customizable (i.e. can be branded)
- Downloadable by your team
- Easily integrated into other production software
- **Multiple administration** – Does the survey provider have the built-in capability to provide pulse surveys and comparative analysis of multiple administrations of the survey (e.g. pre/post surveying)?
- **Other Features** – Does the survey provider have the capability to address other features you have identified as required and desired (e.g. data security, data retention/storage, turnkey service, providing other DEI services)?

5. Pilot one or more survey tools.

In your search for the perfect survey provider you will find that each provider takes a slightly different approach to supporting the survey needs of their clients. Having developed a clear understanding of your survey needs, you will be able to quickly narrow your search to a few promising prospects. To narrow it even further you should conduct a quick pilot of your finalist. Most survey providers will offer you a free trial of their survey platform. Typically, they will give you 30 days to test out their platform using sample data from your organization. These free trials can be extremely helpful in providing you a clear vision of the data you will be able to collect from each of the piloted platforms and the types of reports you will be able to produce.

6. Don't over think it.

What you don't want to do is spend an inordinate amount of time selecting your survey vendor. If you take too long, you will negate one of the key advantages of using an outside vendor ... the ability to quickly launch the survey. Set aside a fixed period of time (1-2 months) during which your team will research, pilot and select your vendor. You want to make a good, informed choice but, making a perfect choice will be difficult regardless of how much time you spend in the selection process.

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