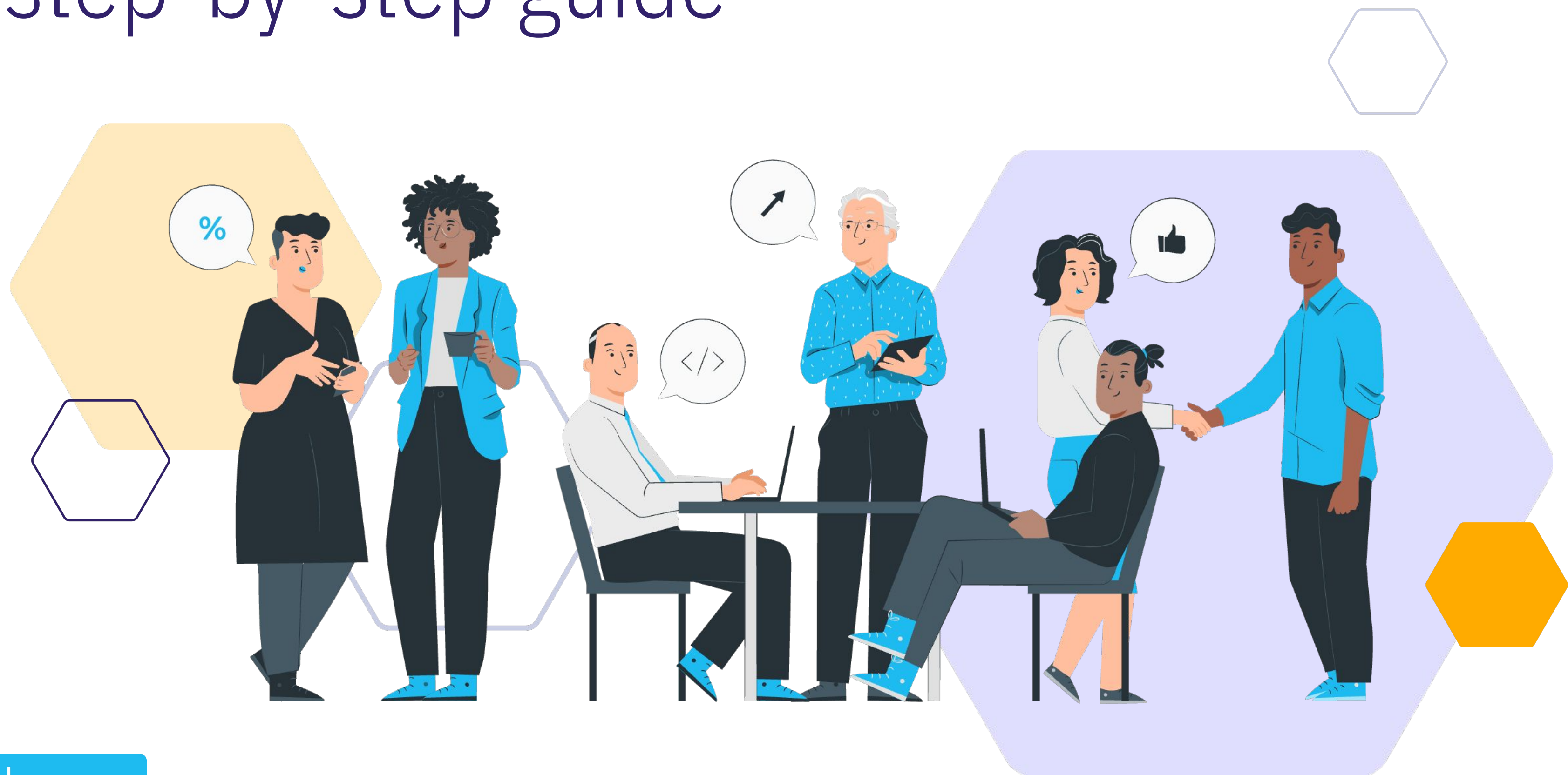# Conducting a Diversity & Inclusion Survey

A step-by-step guide

Introduction

Focusing on diversity and inclusion is more than just the right thing to do.

Allowing discrimination to take place within your organization is unethical, and dealing with an non-inclusive environment takes a major toll on your employees.

Psychological research reveals that discrimination can exacerbate stress, and that discrimination-related stress is linked to mental health issues such as anxiety and depression. **As an HR professional, that is the last thing you want to subject your employees to**.

If you want to make a business case for your diversity and inclusion initiatives, it can help to take a more analytical, profit-focused approach to the subject.

Luckily, **D&I is a demonstrated benefit to business**. Many studies have revealed the correlation between inclusion and business performance.

The business case for D&I

- Companies in the top quartile for ethnic diversity are 35% more likely to have **better financial returns** than the industry medians. (McKinsey)
- A three year study of U.S. venture capital firms released in the Harvard Business Review found that diverse firms had **IPO/acquisition success rates that were 26.4% to 32.2% higher** than those of ethnically homogenous firms.
- Another study of 1,700 companies across the world found that diverse companies **consistently deliver higher innovation** than non-diverse companies.

Why this guide

Diversity and Inclusion projects can be challenging, especially the very first one. **So where do you get started?**

At AIHR, we have always been big advocates for taking a data-driven approach to HR, and believe D&I projects are no different. However, like many matters in the diversity and inclusion domain, this is easier said than done.

That's why we've compiled this step-by-step guide that explains how to gather the data you need to lay solid foundations for making your organization more inclusive.

First we'll take a closer look at what diversity and inclusion mean today, including stats and insights you can use to make a business case for your D&I initiatives.

Then we'll share a step-by-step guide to conducting D&I surveys that will help you gather the data you need to understand the status quo in your organization and create a plan to make your workplace inclusive and welcoming to all.
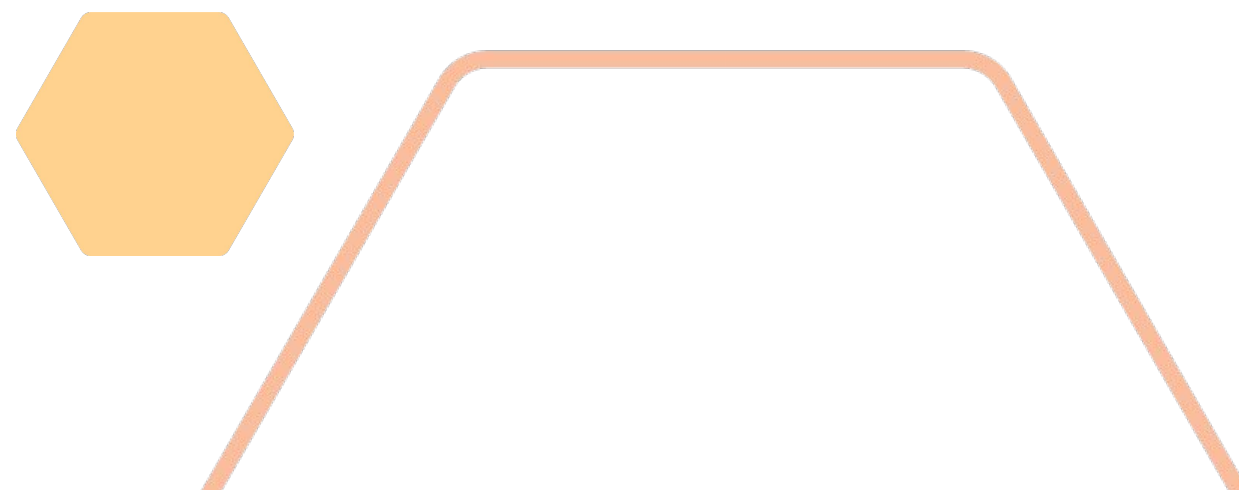
Table of contents

Part 1: Foundations

Get up to speed on the ins and outs of diversity and inclusion, along with key statistics to help you make a business case for an inclusive organizational culture.

Part 2: Step-by-step guide

Learn how to design and distribute an effective diversity and inclusion survey, as well as how to analyze and follow up on your findings.

Diversity

What is diversity exactly, and why should it be a priority for your organization?

What is diversity?

Diversity means making a conscious effort to diversify your organization at all levels by including employees from traditionally underrepresented backgrounds.

This includes well-known demographic categories such as men vs. women, people from different ethnic backgrounds, and members of the LGBTQ community. However, there are more identities to take into consideration, such as people with disabilities, people over 60, people with different religious backgrounds, and veterans.

Intersectional diversity

In addition to the range of identities within your workforce, it's also important to consider that people can belong to multiple traditionally underrepresented groups. An employee can be both a member of the LGBTQ community and have a disability, or be both a veteran and over 60. This emphasizes that members of these groups are not all the same, and while they may face similar challenges and share experiences, they cannot be reduced to a label.
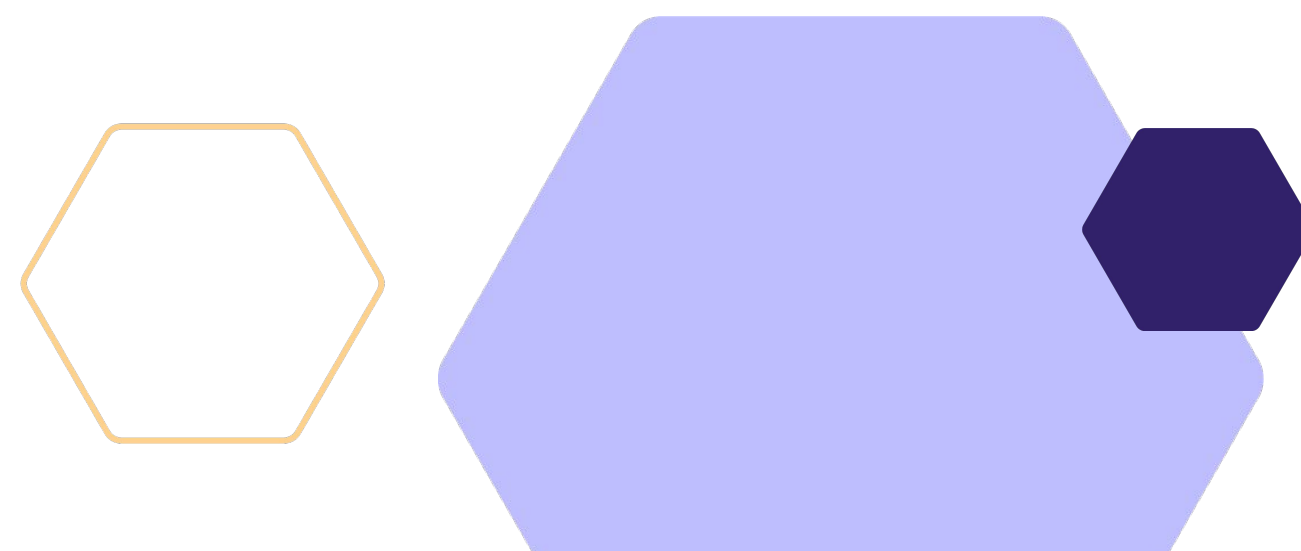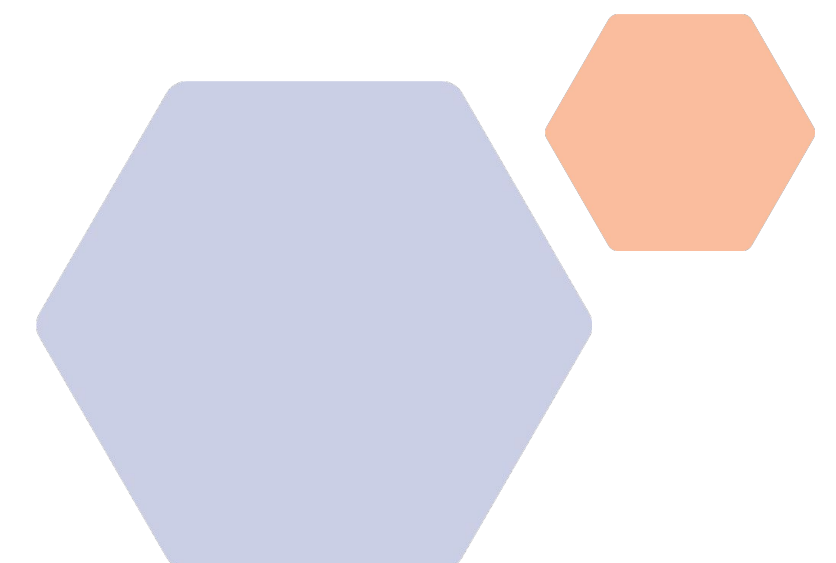
Diversity

Why diversity matters

As we mentioned in the introduction, creating an organization where diversity is possible is both ethical and good for business. Beyond the fact that it simply isn't ethical to discriminate against employees, there are more reasons than ever to make diversity a priority within your organization.

- Glassdoor reports that workforce diversity is an important evaluation factor for 76% of jobseekers.
- Changes in demographics are making diversity within organizations a reality, not a choice. While 72% of baby boomers in the U.S. are white, this is true for just 57% of Millennials and 52% of Gen Z.

"

Diversity means making a conscious effort to diversify your organization at all levels by including employees from traditionally underrepresented backgrounds.

Diversity

And, as we mentioned, diversity also offers **business benefits.** A diverse workforce will have insights, ideas and perspectives that more homogenous teams won't.

- Research by McKinsey found that companies with diverse top teams were **25% more likely to outperform on profitability** and **27% more likely to deliver superior value creation**.

- Deloitte research showed that **engagement** is an outcome of diversity and inclusion.

- A study published in the Harvard Business Review reveals that diverse teams are able to **solve problems faster** than cognitively homogenous teams.

This is just a handful of the data available that demonstrates that having a solid diversity and inclusion strategy is essential. Because as we explain in the next chapter, without inclusion, your diversity efforts will be ineffective.

Inclusion

Having a diverse workforce isn't enough: you also need an inclusive culture.

What is inclusion?

While diversity focuses on the variety of identities within your organization, inclusion focuses on creating a culture where all employees feel welcome and respected. Without inclusion, your organization will not be able to fully benefit from the diversity in your workforce.

Why inclusion matters

If your traditionally underrepresented employees don't feel welcome within the organization and empowered to share their different views and insights, they will be less likely to alert you to potential business mistakes that others may miss.

But it goes beyond that: an inclusive culture can also help minimize unwanted staff turnover. In fact, many business leaders have started to argue that an inclusive culture offers more value than high-end perks.

How inclusive is your culture?

A survey is a great tool to find out, and make your organization more inclusive.

Testing your hypothesis

Diversity simply isn't enough. The key is being inclusive: your employees need to feel welcome enough to share their perspectives and opinions.

You may feel that your organization is inclusive, and that your main challenge is sourcing more diverse candidates. Nevertheless, it's still a good idea to put this hypothesis to the test.

How inclusive is your culture?

The challenge

Research published in the Harvard Business Review reveals that approximately three quarters of employees from traditionally underrepresented groups don't feel they've personally benefited from their companies' diversity and inclusion programs.

How can this be?

> " *Approximately three quarters of employees from underrepresented groups feel they haven't benefited from D&I programs.*

The study reveals that members of majority groups underestimate the obstacles that diverse employees face. Half of all diverse employees stated that they see bias as part of their day-to-day work experience. By contrast, white heterosexual men, who tend to dominate the leadership ranks, were 13% more likely to say that the day-to-day experience is free of bias.

This discrepancy demonstrates that the perception of inclusivity can vary greatly within an organization. And that's where an inclusivity survey comes in.
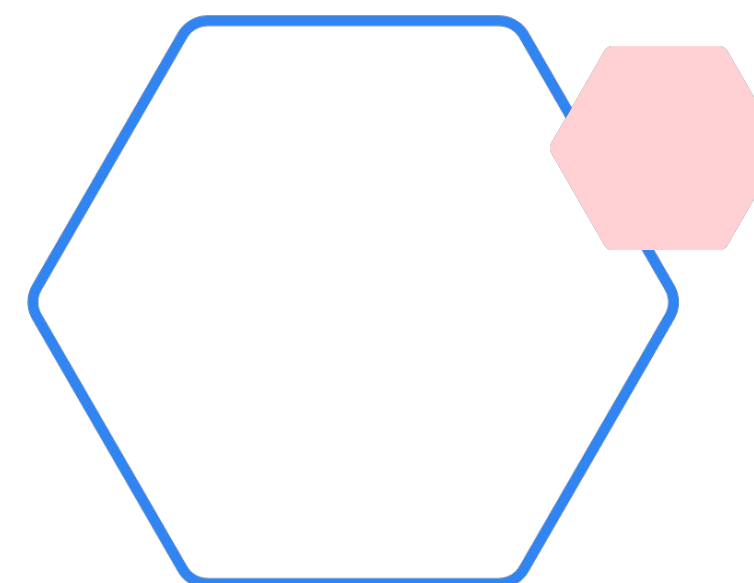
How inclusive is your culture?

How a survey helps

A good way to avoid differing perceptions holding back your D&I initiatives is by gathering more data from throughout your organization. By conducting a survey, you will be including more perspectives on the levels of inclusivity within your organization, revealing potential blind spots and helping you pinpoint areas for improvement.

With the right input from your employees, you will be in a better position to understand how inclusive your organization truly is.

Starting on the next page, you will learn how you can create an effective D&I survey in 5 steps.

Step 1: Get buy-in

Your first challenge is getting the right people on board.

Identify the stakeholders

As with any project, getting buy-in from key stakeholders is vital for the success of your diversity and inclusion survey. Identify and involve the right people: this could be the CHRO, a diversity leader, or even the CEO.

Make your case

When meeting with stakeholders, make sure to explain the goal of the survey and how the organization will benefit.

If this is one of the organization's first D&I projects and you're having trouble convincing stakeholders why your project should be on the agenda, try sharing the D&I stats on pages six and seven. You can also create your own case tailored to your company's strategic goals: there is a lot of research into the benefits of Diversity and Inclusion, so you'll have a lot of material to work with.

Step 2: Create the survey

Asking the right questions is the key to getting the data you need.

No one-size-fits-all solution

The second step may be one of the most difficult in the entire process. Topics such as inclusion are often extremely sensitive, so determining which questions to ask and how to phrase them can be a challenge.

We have gathered examples and information to help you create surveys that let you gather the information you need for your D&I initiatives in a considerate and respectful way. Please note that this information is general; you may need to add or omit topics. Every organization is different and D&I legislation varies from country to country, so there is no one-size-fits-all solution.

Focusing on inclusion

As you may have noticed, this guide focuses strongly on the inclusion aspect of D&I. There are several reasons for this.

Inclusion is more impactful than diversity, and often more challenging to accurately gauge. However, there is also a practical aspect.

Legislation relating to the gathering and processing of diversity data differs from country to country. For instance, many U.S.-based organizations are legally required to file certain demographic information (e.g. race), while gathering such data is strictly prohibited in many European countries.

Be sure to consult your Data Privacy Officer or legal department before proceeding.

Step 2: Create the survey

What to include in your survey

If inclusion is how welcome and respected your employees feel, how do you quantify your company's inclusivity?

Unlike diversity, inclusion is difficult to express in numbers and metrics — but not impossible. Stanford researchers have identified three key aspects of inclusion.
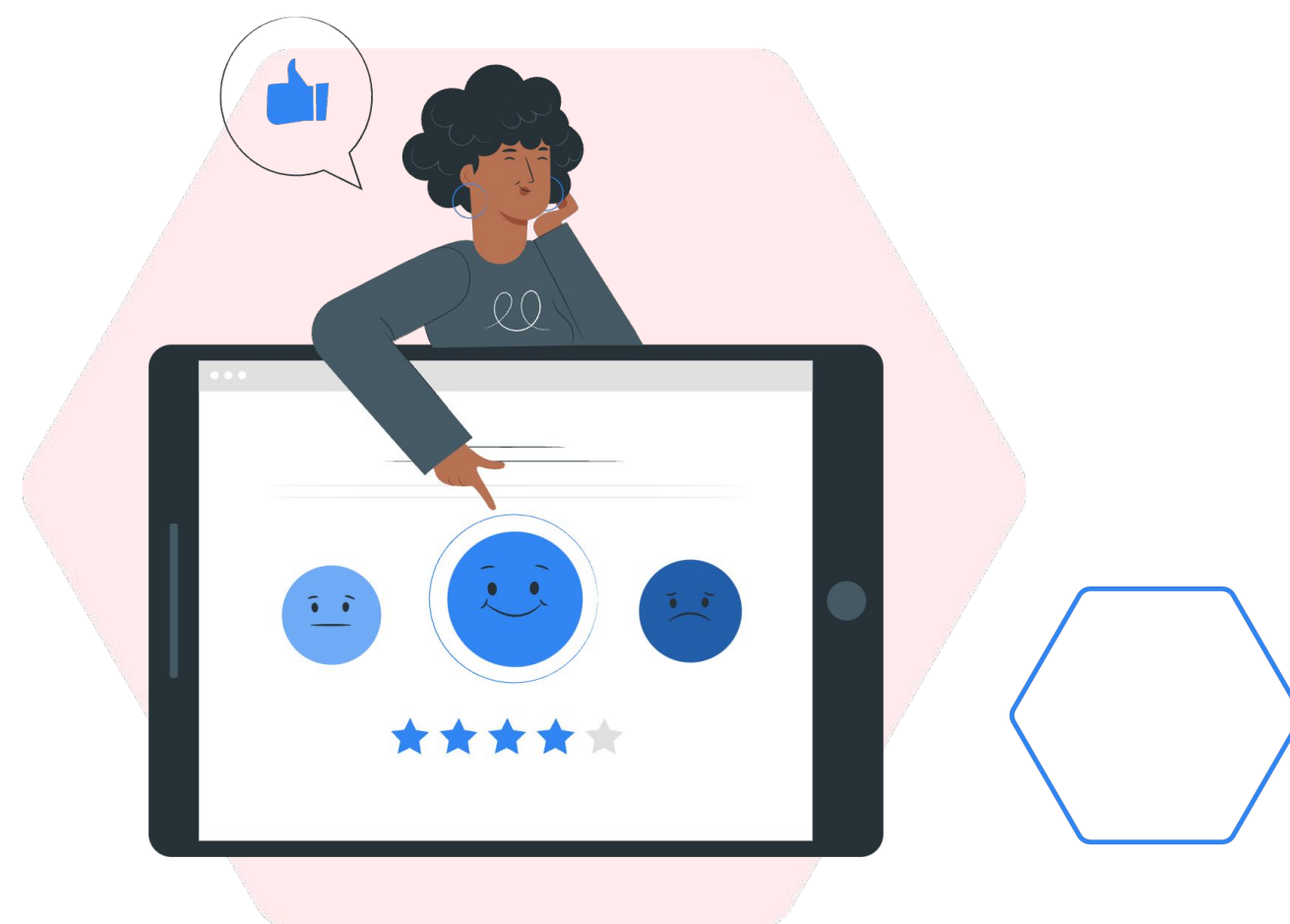
3 key aspects of inclusion

- **Objectivity:** If your organization is sufficiently objective, your employees will feel that promotions and policies are transparent and fair.
- **Growth mindset:** If your organization has a growth mindset, your employees feel that your company will support them in their growth. Without a growth mindset, your employees feel that their value is seen as fixed. With no room for development, they may experience a sense of stagnation and become demotivated.
- **Belonging:** If there is a strong sense of belonging, your employees feel that there is a place for them (and people like them) within your organization.

Step 2: Create the survey

Many common D&I challenges can be traced back to a compromise of the employee experience in one of the three key aspects of inclusion. This makes them a good starting point for your questions.

Here are five example questions created by CultureAmp in collaboration with Paradigm. Each question is a statement that your employees can (strongly) agree or disagree with. There is also a **benchmark** for the percentage of employees who (strongly) agree with the statement, included in square brackets [ ].
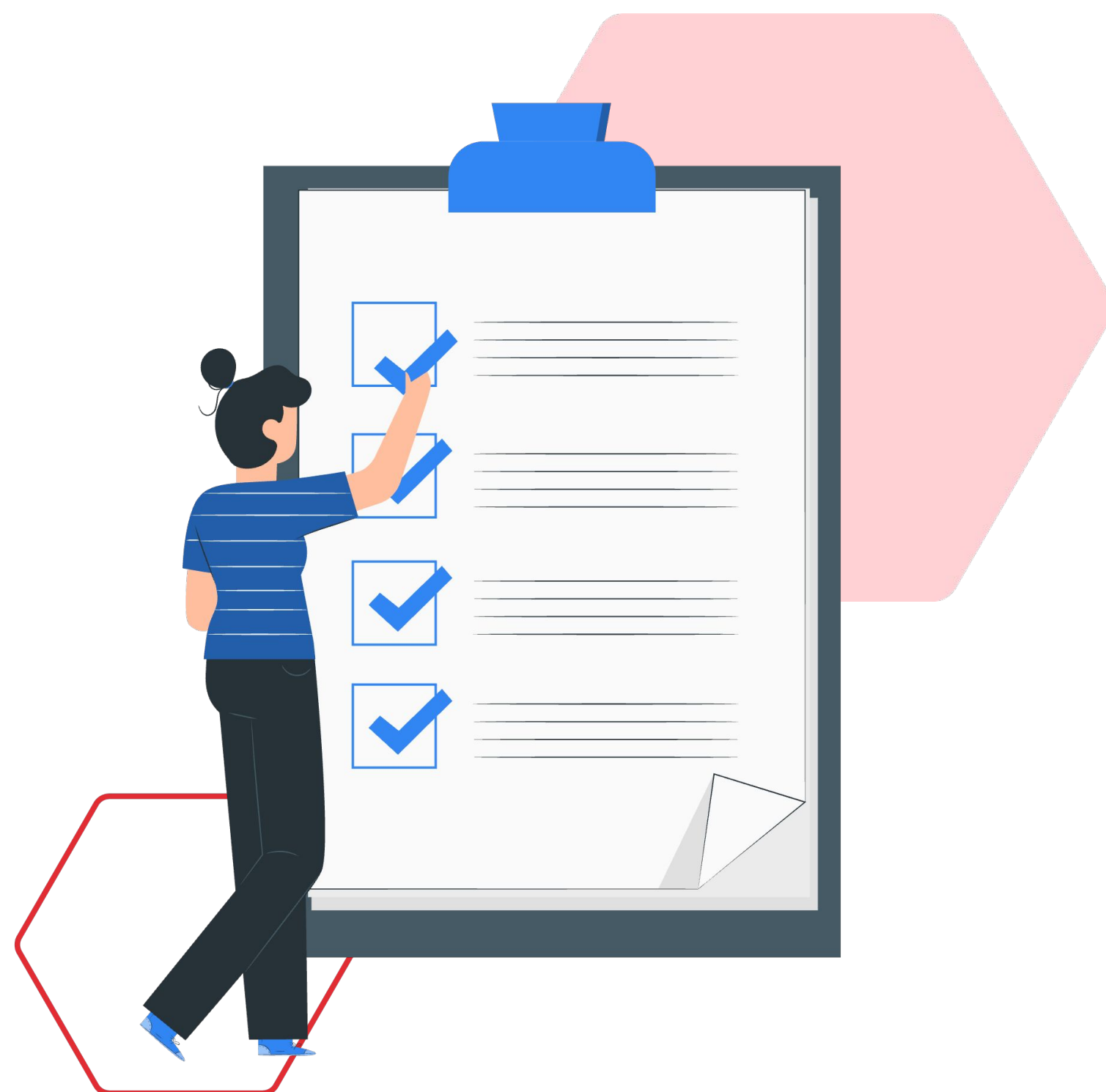
Example questions

1. **I feel like I belong at [company].** [80%]

2. **I can voice a contrary opinion without fear of negative consequences.** [70%]

3. **Perspectives like mine are included in decision-making.** [60%]

4. **[Company] believes that people can greatly improve their talents and abilities.** [82%]

5. **Administrative tasks that don't have a specific owner are fairly divided.** [56%]

Step 2: Create the survey

These questions are based on the three elements, with the final question being an indirect way to gauge the prevalence of microaggressions. Microaggressions are small and often unintentional acts of exclusion that members of underrepresented groups experience frequently — even daily. The fifth question lets you research microaggressions within your organization without actually using this potentially loaded term by using a recognizable and concrete example.

Microaggressions are small and often unintentional acts of exclusion that members of underrepresented groups experience frequently — even daily.

Step 2: Create the survey

More survey creation tips

Allow for non-committal answers. There is a chance that some of your employees may feel uncomfortable answering these questions, for a variety of reasons. Allowing your employees to choose "prefer not to answer" or "other" in response to your questions makes it easier for your employees to respond, and increase your survey completion rate.

Make responses anonymous. This will also make it easier for employees to share their answers to sensitive questions.

Be mindful of the language you use. The last thing you want is an inclusivity tool to make people feel excluded. This can make employees less likely to share honest answers.

Be clear about the goal of the survey. Letting your employees know that their responses will help D&I projects may make them more open to sharing information.

Source: SurveyMonkey
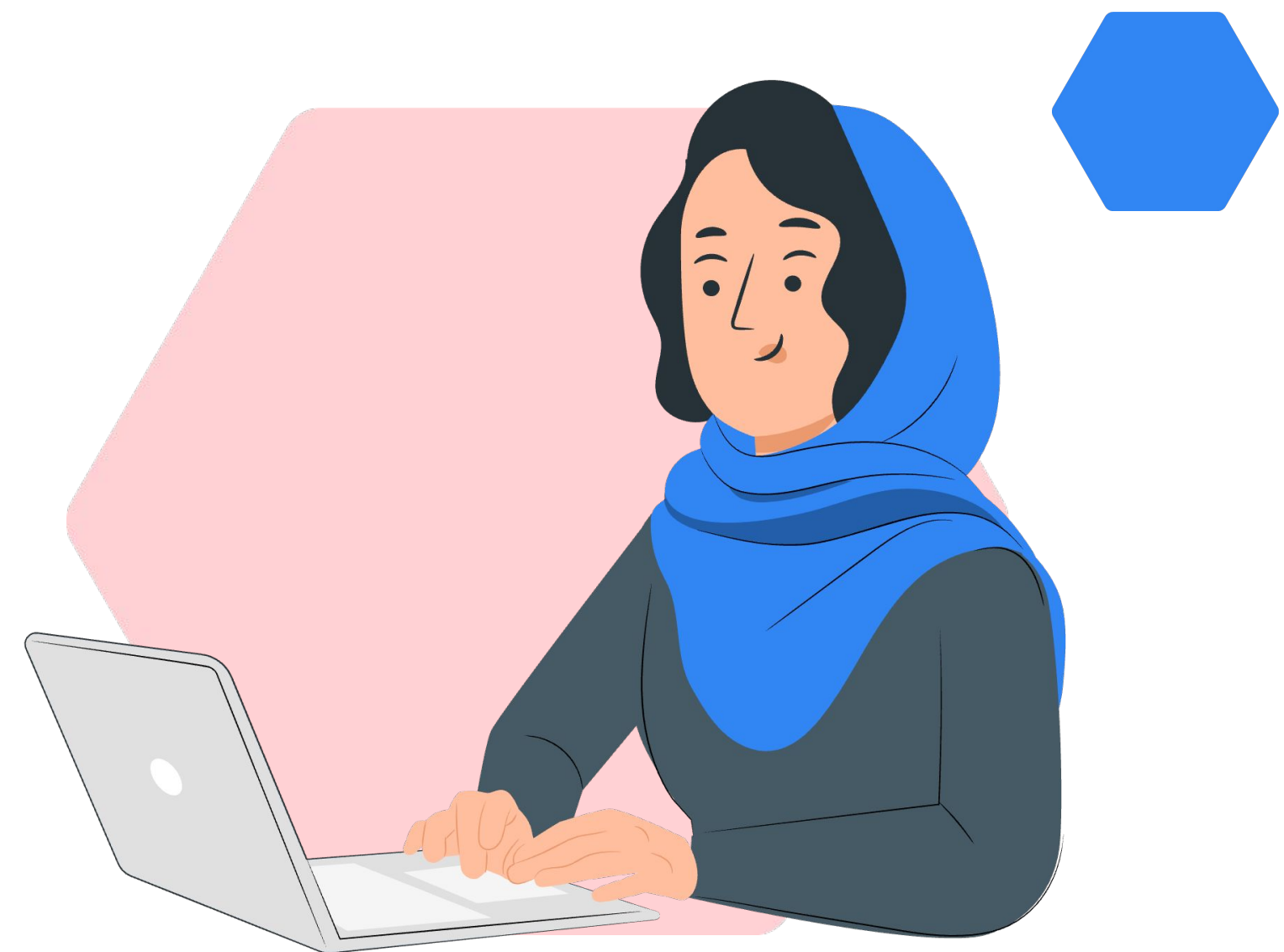
Step 2: Create the survey

Diversity survey tips

Please note: this only applies to countries where gathering this type of data is permitted.

The goal of a diversity survey is understanding how diverse your organization is, and which diversity and inclusion initiatives will benefit your organization.

Make sure to think beyond the 'standard' groups such as women and people of color: there are plenty of other communities that can benefit from additional support or accommodation. Other identities to take into account include:

- Members of the LGBTQ+ community

- People living with a disability

- People with religious backgrounds

- People with caretaking responsibilities

- Veterans

Example survey

Not sure where to start? You can find example questions for the groups listed on this page and others in this employee diversity survey template created by SurveyMonkey.

View the template

Step 3: Distribute the survey

This is how to avoid survey fatigue and gather enough data.

Give a clear, realistic deadline

You're asking potentially sensitive questions that require time to answer. Give your employees sufficient time (1-2 weeks) to find a quiet moment to respond, or at least consider their answers — and be clear about the final deadline.

Extra tips

- *Your employees are busy, and might forget about the survey until it's too late. Ask managers to follow up with and remind their teams.*
- *To encourage more people to fill out the survey, consider offering a small reward for answering.*

Use representative samples

If the survey is for research or policy change purposes rather than individual support, you can survey a representative sample to help prevent survey fatigue. However, this does increase the chance of missing input from smaller subgroups within your workforce.

Conditional screening questions

If you have follow-up questions to certain answers or are only interested in input from specific groups, use conditional screening questions. This will help you keep the survey as short as possible, saving your employees' time and helping prevent survey fatigue.

Step 3: Distribute the survey
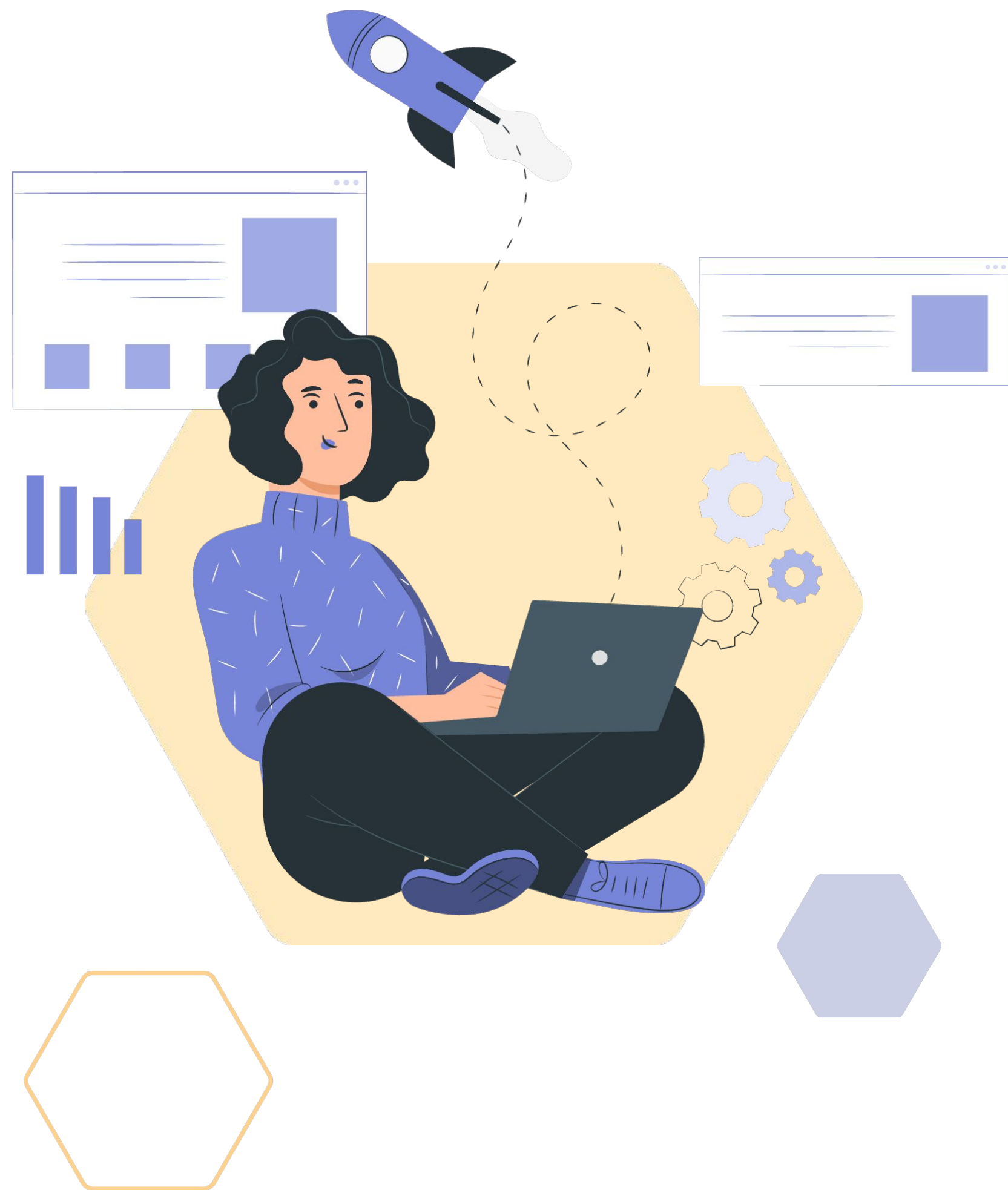
Use entry and exit surveys

In addition to 'regular' surveys, try sending D&I surveys when an employee joins and leaves your organization. Entry surveys can grant insight into the people who are about to help shape your company culture, while exit surveys are an excellent opportunity to gather honest feedback that employees might not dare share at other times.

Monitor progress

By sending the survey out once every 6-12 months, you will be able to see the impact of your D&I interventions and refine your strategy.
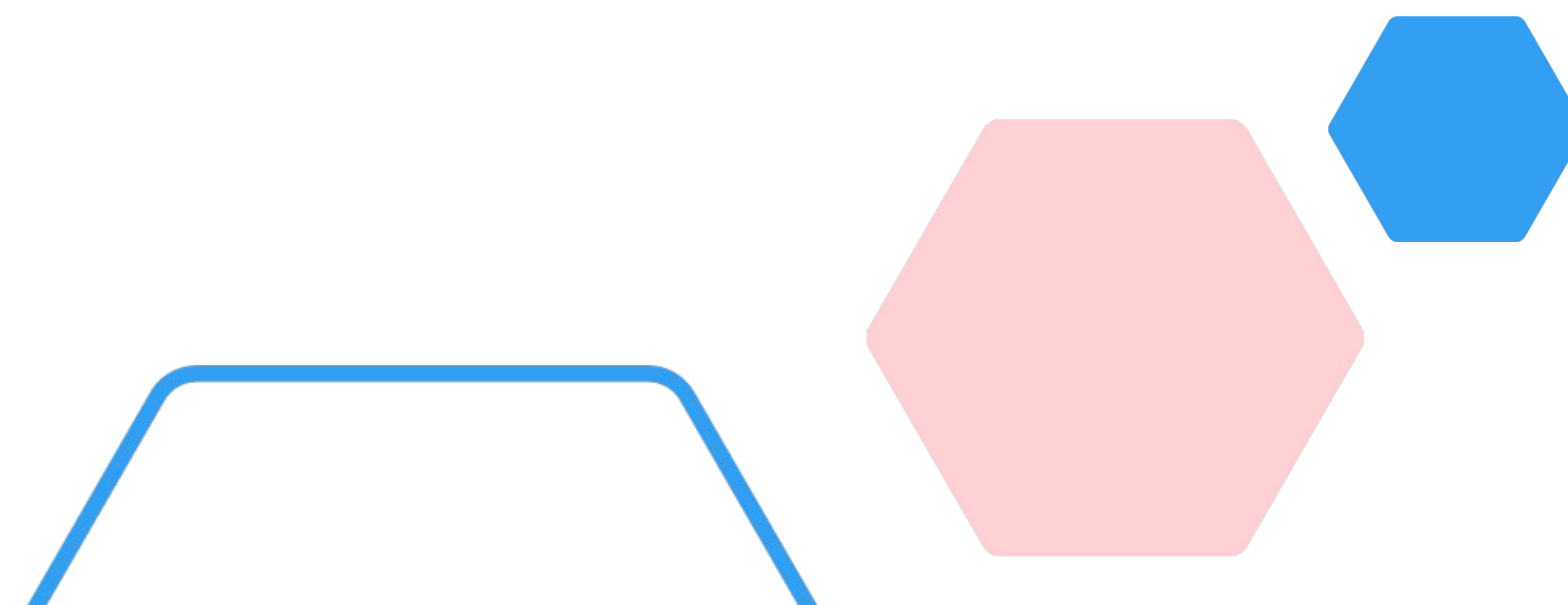
Step 4: Analyze the results

It's time to find the insights that will help create a more inclusive organization.

Do you have enough data?

The definition of 'enough' will vary from company to company. CultureAmp, the company behind a people and culture platform, uses a 72% completion rate as their benchmark. If you feel that you have not received enough responses — particularly from underrepresented groups — then you may want to consider resending the survey.

Compare your numbers

When you have enough data it's time to start your analysis. One way to do this is by comparing your data to benchmarks. This could be your own data from previous surveys, benchmarks from third parties (such as the inclusion question benchmarks provided in this guide), or, if relevant in your country, local demographic data.

Step 4: Analyze the results

Processing the results

Be prepared to be disappointed by the survey responses. You may find yourself confronted with employee experience issues you weren't previously aware of. Remind yourself that this isn't an attack on you or the company. In fact, it means that the survey is a success: you have managed to reveal new insights that can help you improve the inclusivity in your organization.

Step 5: Follow up

Make sure your employees realize that they're making a valuable contribution.

Share enough information

Show your employees that you are doing important work with their input. You don't need to go into too much detail about the results: this could be seen as compromising anonymity, making employees less likely to respond honestly. Instead, share just enough for them to understand the situation and next steps.

You can share more detailed results with selected individuals and groups within the organization, such as leadership, HR, and Employee Resource Groups (ERGs). Once everyone has processed the results, assemble a small project group and select a focus that will help you address any needs revealed by the survey. Remember, you aren't going to be able to fix everything in one go, so make the scope realistic.

Once you have decided on next steps, share your insights and plans with the rest of the company. Again, you don't need to go into detail: high-level learnings and your area of focus should be enough.

You can't fix everything at once, so make sure the scope of your follow-up projects is realistic.
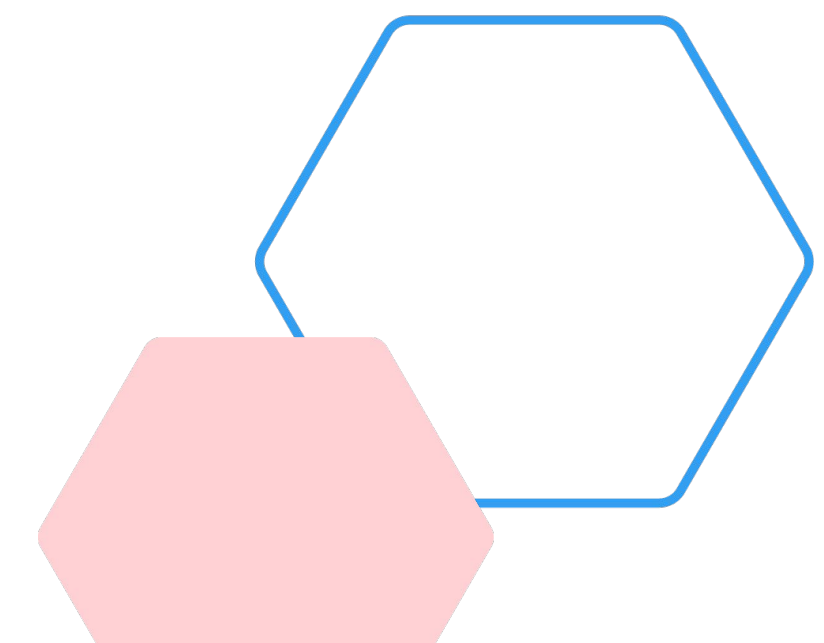
Step 5: Follow up

Next steps

You have your survey results, and have had time to process them. What's next? Here are some examples of ways to promote inclusion in your organization.

- **Mentorship programs** are an excellent way to not only show that your organization believes that people can grow, but to help them do so. These are tried and tested programs, with 71% of Fortune 500 companies using mentoring programs to help their employees thrive.

- **Unconscious bias training** can address automatic associations that can prevent all employees feeling like they belong in the organization. Many people are unaware of their implicit biases, yet it can affect employees at every level of the organization. Creating awareness can lessen the impact and create a more inclusive environment.

- **Employee Resource Groups** (ERGs) are driven and led by enthusiastic employees, but they need the means to get started. It's important to provide the tools, but not start one yourself: this can risk tokenizing your employees from traditionally underrepresented groups.

In practice: a D&I case study

D&I survey in practice

Laura is a HR manager at a software company with 350 employees, based in the European Union. She has always believed in the importance of diversity and inclusion, and was happy when she got sign-off from the leadership team to conduct a D&I survey. She was quite certain that the company was doing well, but wants to know where they can do better.

As the company is based in the EU, Laura didn't include any diversity questions. Instead, she used variations of the five example questions included in this guide. She set up the survey herself using specialized software, and distributed it to all 350 employees.

Once all the results were in, Laura was surprised to see that the company scored well below the benchmark for two of the five points: "The company believes that everyone can grow and develop their talents" and "I feel like admin tasks with no clear owner are distributed fairly". This wasn't what she expected to see.

After taking the time to process the results and discuss them with leadership, Laura was tasked with setting up a project to improve the company's performance on these two points. She researched the matters and decided that mentorship programs, to facilitate employee development, and unconscious bias training, to help prevent unfair distribution of certain tasks, were the best choices for the company.

In practice: a D&I case study

Leadership signed off on the mentorship program, but wanted to wait for the second survey results before investing in training. To help mitigate the admin task issue in the meantime, Laura met with managers to suggest a more formalized process to distribute the responsibility for taking notes during meetings and similar tasks.

After six months, Laura re-sent the survey. She was happy to see that while the organization still wasn't hitting the benchmark for the two questions she's focusing on, there was a clear improvement, which she used to prove the effectiveness of the interventions and get sign-off for the unconscious bias training.
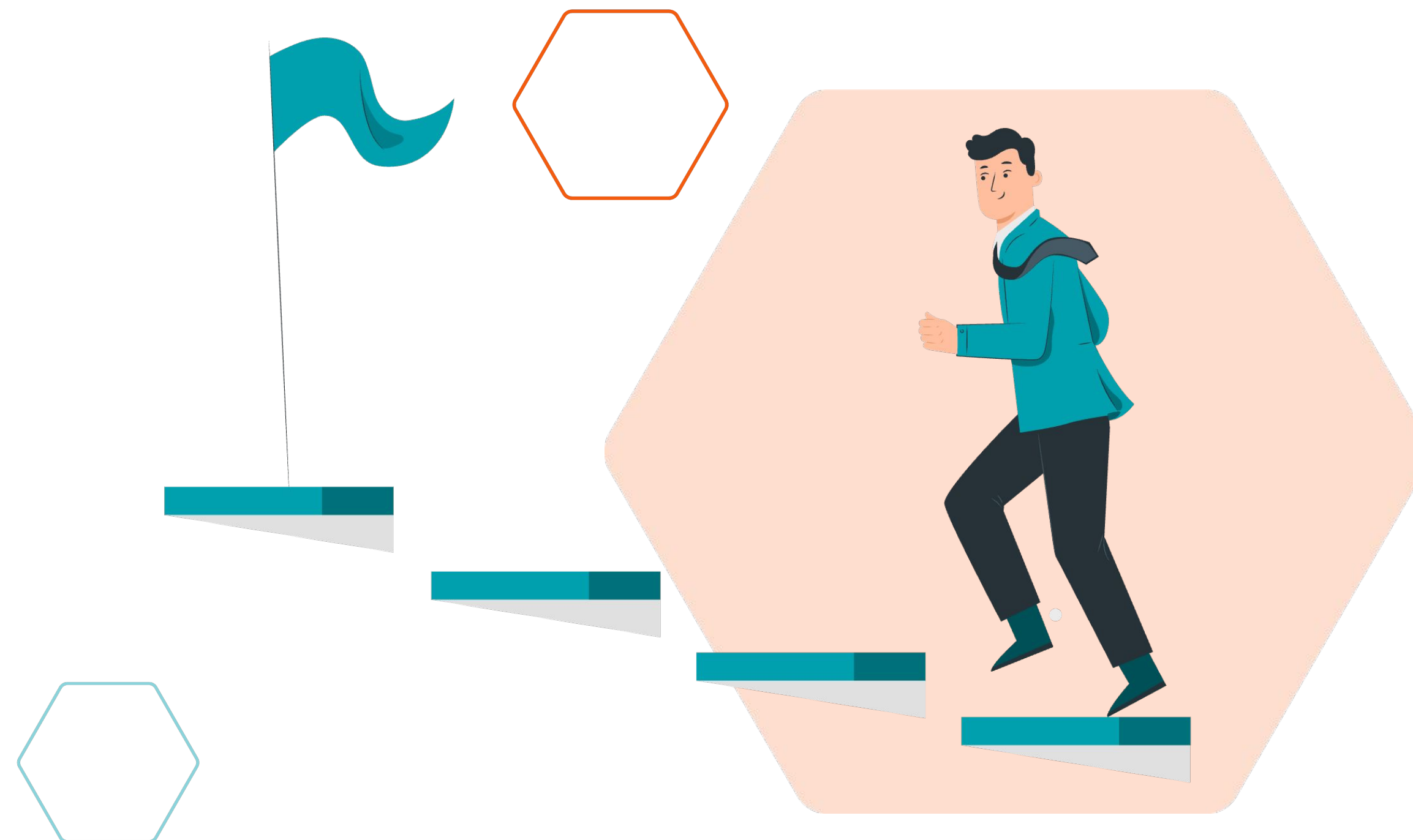
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