

Make it Count

Measuring for Disability
Inclusion in Your Workplace



Build relationships and create social connections. Create Employee Resource Groups to provide support. Identify unofficial leaders and influencers and recruit them as champions. Offer more opportunities for staff to connect with leadership. Build staff and leadership awareness about diversity and inclusion. Create Employee Resource Groups to resources for groups like people with disabilities, then leverage them on the survey. Align your measurement initiative with your organizational strategy. Articulate the business case for measurement of disability and refer to your business goals. Build staff and leadership awareness to create space for discussion. Communicate how measuring for disability aligns with your organizational values and present the goals of your measurement initiative. Demonstrate senior leadership's support for your diversity and inclusion initiatives in tangible ways. Educate your HR or diversity and inclusion team on disability, and spread their knowledge throughout your workforce. Use it as an opportunity to establish trust and report back to underscore the value of your measurement initiative. Explore creative ways to build measurement into other processes. Be transparent about how information will be used and processed. Adhere to strict data protection standards and communicate those to employees. Collect anonymous data to ensure employee response cannot be traced back to them. Ensure participation is voluntary and you have a 'decline to answer' option. Survey annually to capture changes in disabilities in your workforce. Sync your Return to Work programs with your measurement initiative. Educate staff on disability to improve their understanding of whether or not they should self-identify. Conduct testing on the wording of questions and definitions to ensure inclusivity. Respect the choice of employees to self-identify or not. Build relationships and create social connections. Create Employee Resource Groups to provide support. Identify unofficial leaders and influencers and recruit them as champions. Offer more opportunities for staff to connect with leadership. Build staff and leadership awareness about diversity and inclusion. Create Employee Resource Groups to resources for groups like people with disabilities.

SECTION FOUR

Are You In? Here's How You Do It.

In this section, we will outline the recommended steps for your organization to take, and the decisions you will need to make in order to measure disability in your workplace.

STEP 1

Create a Why for Your Organization

The first step in the process is gaining an understanding of why you want to measure disability, and how the process fits into what you have already done around diversity and inclusion. The context will vary from company to company, and depends on your organizational values, goals, and structure. In this guide, we have discussed at length the importance of having a clearly articulated "why" for your measurement initiative. Your why statement will underpin any communications and messaging to stimulate staff and leader buy-in— and provides rationale as to why you are asking for personal information. It will also help your organization get clear on what you can do with the data you collect.

On a fundamental level, understanding why you are conducting a measurement initiative will help ensure you design a process that achieves what you are setting out to do. As data can track progress on your goals, your goals should inform what data you collect. Perhaps you realize your organization needs to survey staff on more than their disability status, and you want to include other employment equity groups or survey on culture and inclusion. Once you have identified why you are measuring, it becomes easier to decide which questions you need to include and whom you need to engage.

We encourage employers to circulate the survey to all staff currently working at their company and collecting a paycheck; including interns, short-term contracts, and people away on maternity or medical leave. If you omit any employment types in your surveying, you might undercount the number of people with disabilities you have on staff.

Quick Tip!

Survey everyone who collects a paycheck at your company. Even if they are not full time or permanent staff, your company is employing them. You risk undercounting your actual numbers if these employment types are omitted.

If you were hooked by the Presidents Group's Pledge to Measure (see page 14), you might want to consider aligning your questions with ours and officially joining the Pledge to Measure. We are aiming to identify two statistics:

1. The number of people on staff who identify as having a disability, and
2. The number of senior leaders who identify as having a disability.

The ballot we've designed can be found in Appendix B: The Pledge to Measure Toolkit. The survey template asks respondents to select whether they identify as having a disability, and whether they are a senior leader at their organization. The ballot itself includes examples of disability to prompt staff who may feel unsure of whether their condition qualifies as a disability. Further education on the definition of disability is supported by the Internal Communications Materials in the Toolkit. The ballot also provides a definition of the term "senior leaders." You may wish to customize this definition to better capture your organizational structure.



Evaluate Your Organizational Context

Now that you know what you are going to measure and why, you need to come to decisions around how you measure. Your organizational context will inform a number of key decisions you make around delivering the survey, communicating with staff, and designing your engagement strategy.

Assess the Level of Trust

The next step begins with a reality check on the level of trust within your organization. Do you have a high trust culture where employees feel they:

- Can respectfully disagree with leadership without fear of reprisal?
- Understand and are engaged in achieving organizational goals and implementing a shared vision?
- Can professionally express their identities without fears of being harassed, excluded, or passed over for opportunities?
- Are able to make and learn from mistakes?
- Believe leaders take responsibility for their mistakes?
- Tend to maintain high morale on the team, even in difficult times?

These are hard questions and a lot of organizations are not there yet. It takes significant time and investment to build mutual trust. Low trust does not mean you cannot move forward with measuring disability in your workforce. It does, however, suggest that your organization might be best served by engaging an independent third party to administer your staff survey. You can also leverage your measurement initiative as a way to build trust by following through on related programming.

Assess Your Organizational Structure

Your organizational structure is another key driver of how you measure. That means determining your answers to the following questions:

- Is our organization complex and dispersed?
- Does our team have the capacity to develop and deliver this initiative ourselves?
- What are our channels for communication and coordination with employees?
- Where do authority and influence lie?
- Are we open or resistant to change?

While the above questions do not cover all aspects of your organizational structure, they address key aspects of your structure you will need to consider as you move forward with designing your measurement initiative. The questions speak to several organizational barriers that were identified in Section 3.



Identify Your Project Manager

Who in your organization will be responsible for delivering the survey and collecting results? It is best to have a single point person, even if others are assigned to assist in the roll out of the survey.

Some organizations have a designated diversity and inclusion person who would be best placed to manage their measurement initiative. However, many do not have a staff person who focuses on HR or diversity and inclusion on a full-time basis. If your organization falls into the latter category, you will have to identify a project manager to oversee the initiative, as well as a leader they can go to if they need support.

Organizations often get more meaningful traction on diversity and inclusion when they have champions in multiple departments. You might choose to do a pulse check to see who wants to be involved in managing the project. Ideally your project manager will be in a role related to HR or operations, as the project will align with their regular functions.

Be cautious of making your staff survey on disability a voluntary side project, particularly in a large organization, because it could get deprioritized.

Identify Key Internal Stakeholders

What other departments do you need to get on side before communicating your measurement initiative to all staff? For instance, if applicable, it is especially important to enlist your organization's privacy officer or legal department early on in the project-scoping phase to ensure alignment with policies and legislation. Your finance team will likely need to be engaged in budgetary decisions. Department heads might be involved in shaping communications.

The exact players will vary somewhat depending on your organizational structure, but it is important to take the time to engage key individuals throughout the team. Your measurement initiative will benefit from leaning on internal expertise about how your organization works and early engagement creates champions for the project who can generate buy-in from their peers.

Decide On Your Data Collection Methodology

There are two main ways to conduct a staff demographic survey—through a paper ballot, or via an online platform. Some organizations use sophisticated internal HR software to implement many HR systems and processes and track data. Organizations that already use these platforms to track employee information and communicate with staff may choose to use them to administer a survey on disability. Others may choose to engage a third party surveyor.

It is up to you to decide which survey methodology best suits your organization, however, we recommend ensuring the process is voluntary and the results remain anonymous. You will likely find that staff will be wary of disclosing they have a disability, especially those with an invisible disability, if their responses are tied to their name or employee number. Such considerations are even more important if there is a lower level of trust in your organization, which we will discuss in the next section.

Paper Ballot

A paper ballot is a simple and low cost method for administering employee surveys. A physical ballot can be circulated to staff, along with a memo that includes instructions to submit anonymously at a ballot box in a discrete area of the office. Ballots can also be passed out and cast during a general staff meeting or a session specifically called around the initiative.

There are a few important benefits to the paper ballot method. It is a simple budget friendly method that can quickly be rolled out in nearly any workplace and requires few materials. It also has the advantage of being anonymous with high transparency in the process. If your survey does not ask staff to identify themselves in any way and uses a low-tech option, you remove many potential objections around protection of information.

However, choosing a paper ballot can increase administration time involved in processing survey results and the potential for error. While the preparation is simple—print out ballots (which can be made on Microsoft Word or adapted from the template in the Pledge to Measure Toolkit in Appendix B) and prepare a ballot box—counting and results tracking needs to be done manually.

So, if you have a large organization, or do not have the staff capacity to count and record each ballot, you might consider using a software option or hiring a third party to conduct the survey. While a paper ballot methodology is more equalizing, in that it does not advantage staff that work on a computer, it may be more challenging to engage remote employees. You can certainly design a mail-in ballot option to address this issue, however, such solutions undermine the simplicity of a paper ballot solution.



Benefits

- Low cost and simple execution.
- Protection of information through anonymity.

Drawbacks

- High time investment with manual counting and tracking, and an associated potential for human error.
- May not be appropriate for dispersed teams with remote employees.

Software Option

Other organizations might explore using an online platform, purchasing a software or integrating a survey into pre-existing HR software. Such solutions address the high time investment required for counting and tracking results when using a paper ballot option, as well as the potential for human error in counting. With a couple clicks, a survey administrator can see how many employees have responded to the survey, the number and percentage of individuals who identify as having a disability within their office, which are collected automatically. A link to the survey can be easily circulated via email, though again, this may not be an appropriate solution if you have employees who are not regularly on email as a function of their jobs.

Many online platform options, like SurveyMonkey or Iquisium, are user friendly, with customizable drag and drop templates. Google Forms is a particularly good option from an accessibility perspective, as the platform is readily compatible with screen reader technology. Such platforms automatically generate reports based on parameters you set and display data visually in graphs and charts. Data is easily manipulated to provide different insights. You might not use some of these features with a short survey on disability, but it might support your organization in interpreting the data you collect using an intersectional lens if, say, you ask for additional demographic data.

Some organizations participate in annual employee engagement surveys run by Great Places to Work or the Canadian Centre for Diversity and Inclusion (CCDI), and can integrate these two surveys by requesting the addition of a demographic module or a customized question about disability status, though this could require an added cost.

However, data protection concerns begin to get more complicated when using an online system. As an example, employers often send company-wide emails through a listserv program. Many such programs allow the sender to track opens and clicks, much like they could for a marketing campaign. By comparing the timestamps, they might be able to match responses to a person's email. Anonymity and data protection is hard to guarantee when using and storing data on an outside system and server. If you use an online software system, keep in mind that data residency laws may require you to only store personal information in servers located in Canada.⁴⁵

Anonymity can also be a challenge when using an internal HR system. While that choice holds many advantages, such as its easy integration into other diversity and inclusion programming, responses will generally be tied to an employee's profile. Given the stigma associated with disability, you may see lower disclosure rates when surveys are not anonymous. Staff

will need to clearly understand who will see their data and have credible guarantees that their information will not be used against them in any way, should they choose to disclose.

Vancity has found that providing certain assurances to staff helped to resolve concerns, such as guaranteeing that only HR has access to demographic data, that the data is only seen by HR in aggregate, and that no person's manager or peers will know their disability status. It should be noted that Vancity also accompanies its annual demographic survey with a significant staff engagement and educational campaign and has built trust over several years of surveying and diversity and inclusion activities.

Benefits

- Automated counting and report generation.
- Removes some potential for human error in counting manually.
- Sophisticated data representation and visualization options, with quick access to pull relevant data.



Drawbacks

- Increased cost for use of some platforms.
- Privacy concerns need to be addressed.
- May not be appropriate for employees who do not work at a computer.

Third Party Surveyor

Other organizations choose to engage a third party to conduct the survey. If trust or capacity is low in your organization and you do have some budget to allocate towards your measurement initiative, hiring an outside consulting firm to conduct the survey might be the right method for you. The extra degree of separation from management and structures within your organization can increase the legitimacy of the initiative, and employees' trust in it. If strict measures around data protection are communicated, employees often feel more comfortable participating. Engaging a third party also simplifies your process immensely, as you will receive reports with data and analysis gathered and interpreted by experts.



Case Study

Outsourcing Collection to Improve Data Analysis

BC Hydro uses a third party data collector, in part because of their emphasis on employee privacy, but also because they get support interpreting the results. BC Hydro receives monthly snapshots and quarterly reports that compare their performance to labour market and occupational codes in their industry. Their team also receives an annual report that helps them understand which demographics joined the team, which left, which were promoted, and which were regularized from a temporary employment status. Such use of data gives the company a sophisticated understanding of trends in their diversity efforts. Of those participating in the Pledge to Measure, BC Hydro does the most in-depth monitoring of their data points, likely possible due to the added support from their third party data collector.

Lesson to apply

Identify which types of data will help your decision making and use your survey to help you get that picture.

Even if you do outsource, that does not mean a complete handover of responsibility. Your team will need to manage the communications and engagement piece for the initiative to be taken seriously and to produce reliable data. You will also have the upfront time cost of finding an appropriate partner to create and administer your survey, which does come with some added risk.



Benefits

- Can address privacy concerns.
- Receive reports and insights generated and interpreted by experts.

Drawbacks

- Highest cost option.
- Time investment and risk involved in finding a third party firm you trust.

Consider Your Employees' Needs

After you identify how you will administer the survey, you should determine the needs of the employees you are surveying. As already discussed, employees may require different engagement systems, email or in-person, depending on their role at your organization. Your team may also include employees who are away on leave during the surveying period. We recommend finding a way to engage staff on disability or parental leave to promote more accurate data.

Individuals might also have very different needs in terms of how they are surveyed. It is important to word questions simply to ensure everyone is able to understand, which for many workplaces means writing at no higher than a grade six level. Some employees might speak English as a second language. It could therefore be more appropriate to ask if certain individuals would prefer surveys and associated materials translated to their first languages. While it might require incurring some additional costs, translation of your survey materials is a one-time investment you will benefit from annually. Providing the survey in the languages your employees are most comfortable speaking ensures staff understand what you are asking of them, which is a concern both from an ethical and data reliability standpoint. There are many translation and interpretation services available to businesses. Mosaic, for instance, is a Vancouver-based non-profit that offers

affordable translation and live interpretation services for businesses in a variety of languages. In addition, the Westcoast Association of Visual Language Interpreters (WAVLI) offers live interpretation for American Sign Language that could support any informational meetings or educational workshops accompanying your survey campaign.

If you have staff who require decision-making support, such as employees with cognitive or learning disabilities, you may need to communicate the initiative to them differently. Certain individuals may require additional support to fill out the survey accurately. These individuals have likely worked with an employment services organization or job coach who can provide direction based on the individual's needs. If not, they may have a family member who offers support in decision-making. The Pledge to Measure Toolkit (Appendix B) has a sample letter you can customize to write to an employment service organization, job coach, or family member to call in the support your employee needs to meaningfully participate in the survey.

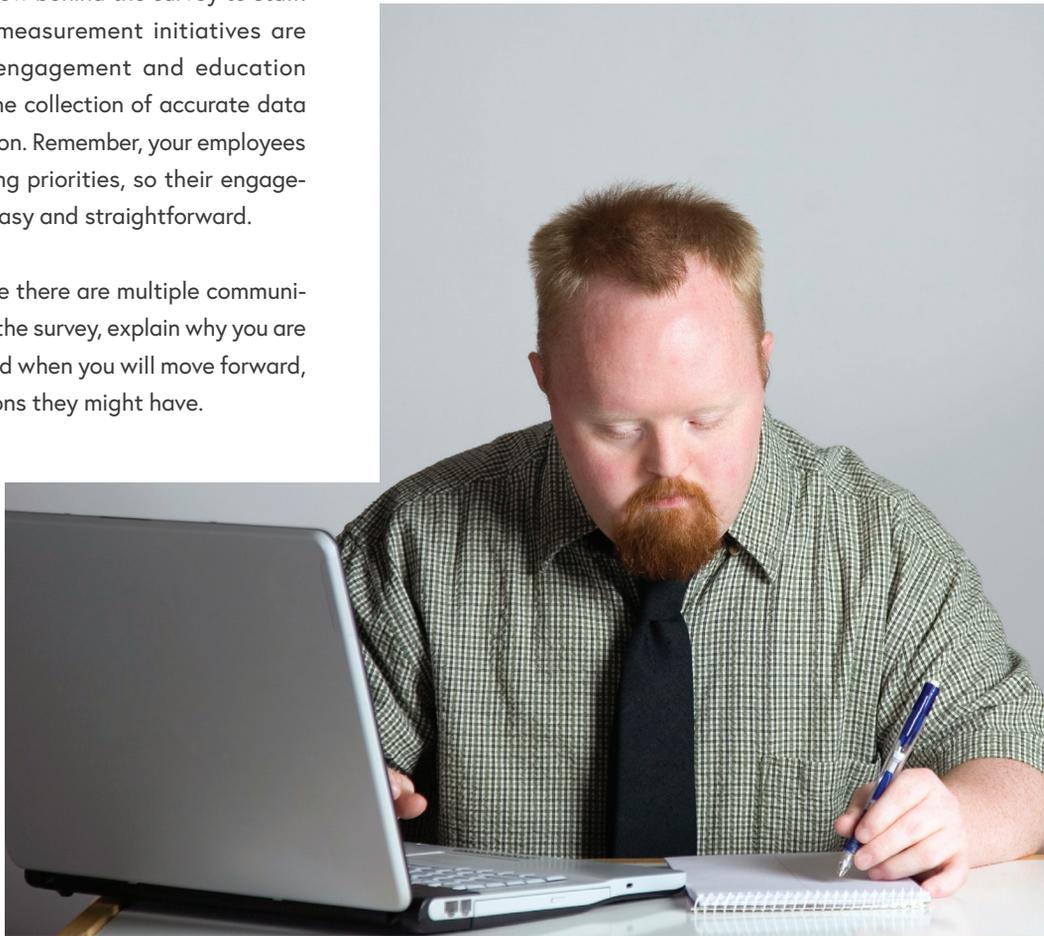
Take some time to consider who you have on staff and what they might need in order to understand the survey and all implications related to their participation.

STEP 5

Make Your Communications Plan

The next step is to decide how you will communicate the why and the how behind the survey to staff. The most successful measurement initiatives are accompanied by an engagement and education campaign to support the collection of accurate data through self-identification. Remember, your employees are busy with competing priorities, so their engagement should be made easy and straightforward.

It is important to ensure there are multiple communications to alert staff to the survey, explain why you are surveying them, how and when you will move forward, and answer any questions they might have.



Decide How You Want to Inform Staff About the Initiative

As suggested above, it is helpful to use a variety of methods for engaging staff to ensure the message is received. First, consider the existing channels for communicating with staff that you identified in Step 2. How could you leverage those touch points with staff to support your measurement initiative's success? It is best to work communications about the initiative into existing structures, because you are reaching staff where they are already spending time and through methods they are familiar with.

Many employers find it most effective to announce the survey with an email or memo, and then follow up in a staff meeting to address employee concerns. It is helpful to create a Frequently Asked Questions document to attach to the memo or initial email that will address likely questions or objections from your staff. The FAQ shows your team is being thoughtful and supportive of staff, which increases confidence in the initiative. Each touch point is an opportunity to educate staff on the definition of disability, how their information will be protected, and what your team will ultimately do with the data. For an example, see Appendix B: The Pledge to Measure Toolkit.

Consider whether there are other points of contact you missed and if so, how you can get creative in using them to engage your staff. For instance, in organizations where employees manually fill out a timesheet or pick up a physical paystub, there's a possibility of attaching a notice or reminder to fill out the survey by the given date. If supervisors review employees' weekly work plans in one-on-one meetings, staff can be asked to add completing the survey to their work plan. There are often many channels to experiment with, but some could require collaboration with different departments.

Determine Your Timeline

We recommend you begin communications several weeks prior to administering the survey. It emphasizes the level of importance your organization is placing on collecting accurate and reliable data on disability. While it might seem like the education work only has to be done in the first year, it is important to conduct engagement and communications activities each year prior to the administration of the survey. It will account for the education of new hires, and provide a valuable refresher for employees who have had a longer tenure at your organization.

Case Study

Campaigning for Survey Engagement

Vancity's iCount Campaign is an example of best practices in communicating a measurement initiative to staff. Each year, Vancity runs a two-week campaign to educate on diversity and inclusion, how it fits into the company's values and their great customer service, and to encourage employees to make sure their identities are "counted" in their demographic survey.

Vancity shares accountability reports to communicate what actions the organization is taking to support diversity and inclusion and relevant excerpts from their business plan. Further, the iCount lead sends an internal newsletter to all staff, including an FAQ and a video compilation of employees explaining why iCount is important to them. Managers are also asked to hold a dialogue session, which provides an opportunity for employees to discuss diversity and inclusion in the workplace and ask questions about the initiative.

As their demographic survey is housed on an internal HR portal, only employees who would like to make updates to their personnel data are asked to do so. However, everyone is encouraged to participate in the conversation.

STEP 6

Download the Presidents Group Pledge to Measure Toolkit

We have created a toolkit with templates and customizable materials to support your organization in collecting data on disability in your workforce. Check out the toolkit in Appendix B to get inspiration and tools to build from as you begin measuring within your organization!



CALL TO ACTION

We invite you to join us in the [Pledge to Measure](#) by submitting your data to ensure your numbers are captured in our campaign to measure that British Columbia is the province with the highest employment for people with disabilities in Canada by 2030. Your data can help grow the number of employees with disabilities who are counted across the province, and encourage other employers to do the same.

If you have more questions about measurement and what might work for your organization, reach out to the Presidents Group at info@accessibleemployers.ca.



Pledge to Measure

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