CREDIT: KENYA POWER

ENGENDERING INDUSTRIES:
USING SURVEYS TO ADVANCE WORKFORCE GENDER EQUALITY

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INTRODUCTION

When organizations survey their employees and use the data to make positive workplace adjustments, they improve employee engagement,[1] increase retention rates, lower absenteeism,[2] and improve productivity.[3] When leadership conducts surveys, they signal their interest and commitment to employee wellbeing while gaining valuable insights into their employees' workplace experience. If designed correctly, surveys provide valuable data on gender equality and social inclusion in the workplace and identify entry points to introduce gender equality initiatives.

Incorporating a gender lens into workplace surveys is critical for identifying the unique needs, skills, and experiences of men and women. For example, surveys enable companies to collect sex-disaggregated data that provides insight into employee perceptions of safety, inclusion, work-life balance, and flexibility.

This guide provides an overview of three types of workplace surveys:

1. Employee engagement surveys

2. Employee satisfaction surveys

3. Organizational culture surveys

When implemented correctly, surveys can serve as a foundation for improving gender equality and workplace culture and bring meaningful change to an organization.

WHAT IS DISAGGREGATED DATA?

Disaggregated data is any data collected on individuals broken down by demographic characteristics such as sex, gender, age, ethnicity, income level, religion, etc. Disaggregating data enables companies to analyze potential disparities among different groups of employees. Therefore, companies should disaggregate data collected by sex and other relevant demographic variables.

By simply adding a question for respondents to identify as male/ female/ other or prefer not to say, you are ensuring that you can disaggregate your results by sex.

SURVEY TYPES

EMPLOYEE ENGAGEMENT SURVEY

WHAT IS IT?

Employee engagement surveys collect data on employees' perceptions of their workload, job fit and connection, manager relationships, and growth opportunities. These studies help companies understand what their employees are passionate about and what they need to be successful at the organization. Employee engagement surveys help leaders identify their employees' needs, including the need for mentoring, leadership development, or training programs. Leaders can also use this survey to gauge staff involvement and satisfaction in existing programs or events and identify what motivates their staff. Organizations can use this information to maintain or improve company culture.

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1 Dnika J. Travis, Emily Shaffer, and Jennifer Thorpe-Moscon. (2019). Getting Real About Inclusive Leadership: Why Change Starts With You. Catalyst. Available at: https://www.catalyst.org/research/inclusive-leadership-report/
2 Juliet Bourke and Andrea Espedido. (2019). Why Inclusive Leaders Are Good for Organizations, and How to Become One. Harvard Business Review. Available at: https://hbr.org/2019/03/why-inclusive-leaders-are-good-for-organizations-and-how-to-become-one
3 International Labour Organization. (2019). Women in Business and Management: The Business Case for Change. Available at: https://www.ilo.org/global/publications/books/WCMS_700953/lang--en/index.htm

WHY CONDUCT EMPLOYEE ENGAGEMENT SURVEYS?

Employee engagement surveys provide an organization with valuable insights into what women and men need to maintain motivation, commitment, and engagement, all of which are critical to organizational performance and retaining talent. In addition, employees are increasingly looking for workplaces where they feel purpose, passion, and belonging. Employee engagement surveys help a company assess what is needed to ensure that the workplace becomes or remains an attractive place to work. Organizations can also use the data to plan for future work priorities or employee engagement programs that meet the needs of both female and male employees.

HOW CAN EMPLOYEE ENGAGEMENT SURVEYS BE USED TO ADVANCE GENDER EQUALITY?

When organizations use a gender lens in survey implementation (including collecting sex-disaggregated data), they gain valuable insights into the unique differences, challenges, needs, and constraints of women and men in the workplace. During the survey and question design process, employers should also consider gendered differences in roles, responsibilities, and social norms among women and men

CASE STUDY – KENGEN PINK ENERGY

Kenya Electricity Generating Company (KenGen), an Engendering Industries partner since 2020, conducted an Organization Health Assessment (OHA) with the help of McKinsey in the year 2015. This employee engagement survey found that inequitable training opportunities between women and men reduced women's motivation to pursue leadership roles. To address the issue, the KenGen Board of Directors and leadership team introduced a women's development program, Pink Energy, in 2016. Pink Energy supports the development of all women in the company, focusing on the gaps identified in the survey. Pink Energy has three fundamental pillars: personal growth and empowerment, creating a conducive work environment, and gender awareness. Pink Energy sponsors numerous activities yearly, such as sessions on professionalism, career growth, financial management, health, parenting, and mentorship. In addition, they have partnered with numerous institutions, including Safaricom Women in Technology, the Women Engineers Chapter of the Kenyan Institution of Engineers, and Women in STEM. In addition to establishing a network throughout the organization, Pink Energy advocates for additional benefits, such as providing

appropriate personal protective wear for women and establishing lactation rooms at KenGen's offices. When reissued in 2020 by Klynveld Peat Marwick Goerdeler, the OHA concluded that the motivation of women in the company had increased by 28 percent since it carried out the previous survey in 2015, with a difference of only two percent in motivational levels between women and men. The organization attributes the improvement to the work of Pink Energy and positive female leadership.

PHOTO CREDIT: KENGEN

in their country or cultural context. For example, women typically bear more significant household and family caregiving responsibilities. As a result, lack of childcare could prevent women from participating in workplace skill-building programs, particularly if these programs occur after hours or in addition to their regular workload. Understanding these gendered dynamics will inform how managers schedule workplace programs to increase the participation of women.

WHEN SHOULD YOU USE THIS SURVEY?

This type of survey is helpful if employee engagement at the organization is low and employees seem uninterested in participating meaningfully in their day-to-day work or other events or programs. Engagement surveys are critical if a specific demographic group is less engaged. In addition, conducting a survey can help identify problems so the company can improve its corporate culture. Companies may also complete an employee engagement survey when designing a program, such as mentoring programs, employee resource groups, and networking events, to gather their feedback and ensure that the company hears and accounts for the needs and priorities of both women and men. Finally, employee engagement surveys are one tool to promote organizational change and enhance operational performance in areas such as productivity and customer service.

SAMPLE QUESTIONS FOR THE EMPLOYEE ENGAGEMENT SURVEY:

- The company will be creating a leadership development program. Which of the following would you likely participate in (check all that apply)? 1. Mentoring with you as the mentee; 2. Mentoring with you as the mentor; 3. Networking events; 4. Leadership skills training; 5. Job shadowing in other departments; 6. Industry conferences

- Compared to one year ago, do you feel more or less loyal to this organization? Response options: More; Less; No Change

- For more examples, see Annex A

IMPORTANT THINGS TO REMEMBER:

- Employee perception of how well an organization is doing might differ from leadership's perception. Furthermore, women might have different perceptions than men. Therefore, do not be discouraged if this survey results show low satisfaction levels. Instead, use unfavorable results to drive action and change.

- Listen to employees to understand their needs in the organization. For example, if you offer employees a mentoring program and they seem uninterested, be ready to pivot.

DON'T BE GENDER BLIND!

Ask these questions:

Are there certain barriers or constraints (e.g., childcare or other household responsibilities) that prevent women from participating in existing programs? Ask participants about these barriers.

Do fewer women sign up for leadership programs? Develop some questions to identify why this happens.

Are women motivated by different aspects of their work (e.g., manager relationships, opportunities for growth, etc.) compared to men?

CASE STUDY – BSES RAJDHANI POWER LIMITED (BRPL) FIELD WILLINGNESS SURVEY

BRPL, an Engendering Industries partner in India, conducted an employee engagement survey to assess the willingness of women to be promoted to field (as opposed to office-based) positions, as well as to understand constraints and limiting factors for such promotions. The company administered a ten-question survey to female engineers. To increase participation in the survey, BRPL shared a video featuring a female role model who encouraged female employees to complete the survey. Over 60 percent of women surveyed were willing to take field-based jobs immediately or within one to two years. In addition, 92 percent of women were willing to take on a higher level of responsibility. The survey dispelled the myth that women "don't want field positions." However, the survey revealed that the lack of separate toilets for men and women were an issue, and social norms and safety concerns prevented women from working the night shift. To address these findings, BRPL installed female-only toilets and put job-splitting arrangements where female supervisors would occupy the day shift while male subordinates would learn on the job during the night shift. While not a traditional employee engagement survey, BRPL's field willingness survey shed light on what female employees need and want to occupy and excel in positions with increased responsibility, including field supervisory roles.
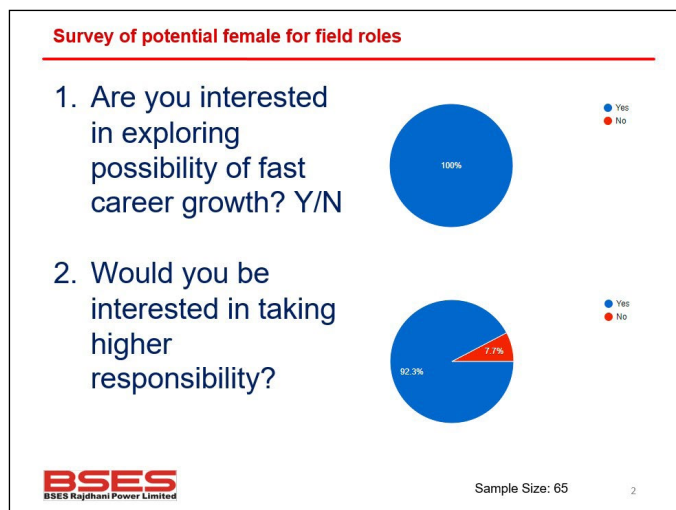
EMPLOYEE SATISFACTION SURVEY

WHAT IS IT?

Employee satisfaction surveys provide data on employees' views, attitudes, and perceptions of the organization. These surveys cover work-life balance, health, and happiness factors and reveal whether employees are satisfied with company benefits.

WHY CONDUCT THIS TYPE OF SURVEY?

Employee satisfaction data enables leaders to make strategic organizational improvements and address turnover and poor retention. When organizations develop sex-disaggregated employee satisfaction surveys and use a gender lens, they are able to identify gender inequities in the workplace. For example, survey results might reveal areas where the company can improve benefits or better support employees during crises such as the COVID-19 pandemic. They can also measure improvements in gender equality, diversity, and inclusion within the company.

HOW CAN EMPLOYEE SATISFACTION SURVEYS BE USED TO ADVANCE GENDER EQUALITY?

Women and men often have different experiences, views, attitudes, and perceptions about an organization, leading to varying satisfaction levels by gender. Lower satisfaction levels among women could cause them to leave the company at higher rates than men. Understanding and addressing women's unique workplace challenges may increase their satisfaction and improve retention.

WHEN SHOULD YOU USE THIS SURVEY?

Companies should periodically conduct an employee satisfaction survey to measure changes in attitudes and perceptions over time. They can also be administered after triggering events, crises, or

CASE STUDY – DISTRIBUIDORA DE ELECTRICIDAD DEL SUR, S.A. DE C.V. (DELSUR) PERCEPTIONS SURVEY & SAFETY AND SECURITY SURVEY

DELSUR, an electricity distribution company based in El Salvador and an Engendering Industries partner, surveyed the company's Safety Committee to identify gender gaps in safety and security. This committee represents the interests of leadership, personnel, and the union related to occupational security, prevention, and health at DELSUR. They are responsible for consolidating information and observations about the needs of the technical staff and shortcomings of the company related to safety and infrastructure conditions and recommend actions and investments to senior management in favor of safety.

The company conducted this employee opinion survey in person over two sessions to: 1. educate and sensitize this strategically important committee on the need for gender equality; and 2. identify and address safety and security issues for women. The pre-survey training session was vital for the committee to understand the survey's context and be familiar with terms and concepts. Then, the committee chose to answer the survey questions together as a group to support decision-making by the company. Through this process, the committee identified specific gaps for women related to occupational security and prevention and successfully advocated for including remedies in the company's annual plan. Specifically, they modified the company's Safety and Security policy to incorporate a gender lens and address women's specific safety and security needs, such as female-only toilets and changing facilities. In sum, the survey yielded high-quality, actionable data leveraged to remove barriers for women to hold field-based positions.

To the right are are examples of questions posed to the Safety Committee.

b) Does the team **have appropriate** sizes for **women**?

c) Is there **safety** when **going to and from** the workplace?

organizational changes, such as mergers, leadership changes, or corporate restructuring. It is also a good idea to conduct these surveys during employee onboarding and exit surveys, especially if women in your company leave at higher rates than men.

SAMPLE QUESTIONS FOR THE EMPLOYEE SATISFACTION SURVEY:

- On a scale of 1 (never) to 5 (always), how often does management show, through action, that diversity and gender equality are one of the company's highest priorities?

- On a scale of 1 (not at all important) to 5 (extremely important), how important are the following benefits to you? 1. childcare; 2. maternity/paternity leave; 3. health care; 4. family leave; 5. flexible work schedules; 6. tuition reimbursement; 7. retirement savings; 8. mental health services; 9. fitness center or other benefits; 10. lactation rooms (add other benefits as relevant to your organization)?

- In your opinion, what changes or new benefits at the organization would improve your work-life balance?

- For more examples, see Annex A.

IMPORTANT THINGS TO REMEMBER:

DON'T BE GENDER BLIND!

Ask these questions:

Do employees feel that the company is doing enough to address gender equality, diversity, and inclusion? Ask both women and men how they feel about these efforts.

What benefits might be most valuable to women, especially to help maintain work-life balance? Ask employees to rank these benefits for valuable insights.

Has the COVID-19 pandemic affected female and male employees differently? Identify questions to uncover how the women and men have experienced the pandemic.

- To retain employee trust in the organization and encourage participation, you should be prepared to act upon the survey's findings. If employees feel that nothing will change based on the survey results, they will be more reluctant to answer honestly and thoughtfully, and/or to participate in future surveys. Furthermore, lack of action on the part of the employer may exacerbate negative perceptions of the workplace and/or leadership.

- A communications campaign about the survey will help to encourage employees to participate and to ensure that as many employees' opinions are captured as possible.

## CASE STUDY – EDESUR DOMINICANA, S.A. (EDESUR) EMPLOYEE SATISFACTION SURVEY

EDESUR Dominicana, an electric utility in the Dominican Republic and Engendering Industries partner, carried out an employee opinion survey to assess the status of employees' satisfaction with their workplace and environment. Topics included satisfaction with organizational values and objectives, collaboration and knowledge, and leadership and communication. A third party conducted the survey anonymously to ensure that participants felt safe to answer honestly. The survey targeted all company employees and received an 80 percent response rate. In advance of the survey, the company held onsite visits and group talks to inform and guide employees on how to take the survey, to communicate about the anonymity of survey responses, and to provide guidance on how to complete the survey correctly. These were critical success factors for obtaining high-quality, timely, and actionable data.

EDESUR's team identified several best practices to maximize the survey response rate: paying attention to the timing (for example, avoiding sensitive times in the business cycle or holidays), sending frequent reminders, and sensitizing employees so that they understand and commit to completing the survey. In addition, it is essential to limit the number of questions, use familiar tools or platforms, and communicate survey results.

The data from the survey revealed the following:

- A greater percentage of men believe they have opportunities for personal development and growth.

- Over 80 percent of men perceive that their supervisor motivates them to develop their ideas, versus 78 percent of women.

- More women believed they received fewer opportunities and less pay than their male counterparts.

- In most of the questions regarding supervision and leadership, men scored better than women (though it is important to note that men hold most supervisory positions).

- One-third of women indicated that there are barriers that make it difficult for them to occupy certain positions compared to one-sixth of men

- One-third of women believe the utility does not offer equal opportunities to men and women and 25% of women expressed that the utility does not provide pay equal to men and women.

This valuable information is essential to advocating for changes and programs that enhance gender equality. At the time of writing, the utility was finalizing its gender strategy, encompassing interventions that directly address the gaps identified during the survey.

EDESUR Organizational Climate Survey
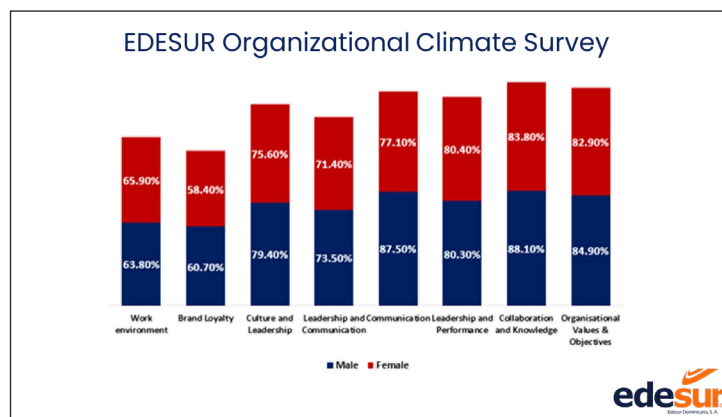
ORGANIZATIONAL CULTURE SURVEY

WHAT IS IT?

Organizational culture surveys gather data on sensitive issues within an organization safely and confidentially for employees. Typically, these surveys probe alignment of an organization's vision and mission with the reality of the employee experience. These surveys may include topics such as the attitudes around sexual harassment and gender-based violence (GBV) at your organization, incidents of discrimination and biases in the workplace, the state of mental health and wellness among your employees, or other topics that touch on ethical issues.

WHY CONDUCT THIS TYPE OF SURVEY?

The topics covered in organizational culture surveys are sensitive, and employees might feel hesitant about sharing their opinions and experiences in a workplace setting. Nevertheless, implementing an organizational culture survey helps companies identify where they might need to adjust their policies or practices to protect and support employees. Or, they might identify areas where mental health support could reduce absenteeism or tardiness.

HOW CAN ORGANIZATIONAL CULTURE SURVEYS BE USED TO ADVANCE GENDER EQUALITY?

Many of the issues discussed in this survey disproportionally affect either women or men. For example, women are more likely to experience sexual harassment or discrimination in the workplace. Thinking through these topics with a gender lens will help an organization to develop a more impactful survey that covers all issues affecting women or men in the workplace. Since these surveys are more sensitive, it will also be critical to consider the type of safeguards needed when conducting the survey. For example, survey enumerators should be trained on survivor-centered approaches to sexual harassment

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NOTE ON ADDRESSING SEXUAL HARASSMENT AND GBV IN A SURVEY

It is not recommended to survey employees on the prevalence rate of sexual harassment or GBV in the workplace since these types of surveys require a representative sample of employees, which can be hard to obtain. Employees are also very unlikely to report an incident of sexual harassment in a survey, so a survey on the incidence will likely not be accurate. However, questions around attitudes and perceptions related to sexual harassment and GBV may be added to surveys when done carefully and respectfully. For example, companies can survey employees working in rural satellite offices on their perception of safety in restrooms and overnight quarters to understand risk factors for sexual harassment and GBV. Companies can also survey employees' opinions toward company policies and practices to identify what works well to respond to sexual harassment and GBV. See Annex A for more examples of questions on this topic.

Companies can also conduct focus groups or a safety audit facilitated by a trained professional as a stand-alone or to complement survey data on perceptions of safety. Focus groups should not specifically ask questions about experiences of violence. A trained counselor should also be present in the focus groups and during safety audits to provide immediate psychological first aid to employees. It is important to note that any survey on these issues should be developed and facilitated by professionals trained in sexual harassment and GBV to minimize harm.

and GBV response in cases where an employee discloses an incident of sexual harassment. It also might be valuable to balance the gender composition of the survey team to ensure that all participants feel comfortable and safe.

It is also important to adopt a survivor-centered approach when someone discloses an incident of sexual harassment or GBV. If a survey respondent discloses an incident, the company should guarantee that it will not take action unless the victim wishes to identify themselves and chooses to take further steps. Communicate this safeguard to all survey respondents at the beginning of the survey.

WHEN SHOULD YOU USE THIS SURVEY?

Conducting organizational culture surveys annually can help an organization track improvement over time. Companies should also use these surveys to gauge staff perceptions honestly and safely. They may also be used when the company has a business need or seeks to adopt a new vision.

EXAMPLE QUESTIONS:

- On a scale of 1 (strongly disagree) to 5 (strongly agree), how much do you agree with the following statement: "My company takes issues of sexual harassment seriously."

- On a scale of 1 (strongly disagree) to 5 (strongly agree), how much do you agree with the following statement: "Promotions at this company are based on fair and objective criteria."

- On a scale of 1 (never) to 5 (always), how often do you worry about your mental health?

- For more examples, see Annex A

IMPORTANT THINGS TO REMEMBER:

- To ensure the most honest responses, you might consider making the survey anonymous or confidential (see guidance here) to encourage employees to speak freely without fear of retribution or stigma. The survey should also be optional, and no employee should be required to fill out the survey.

👁‍🗨 DON'T BE GENDER BLIND!

Ask these questions:

Is sexual harassment taking place within the company, even if nobody is reporting it? Develop some questions that outline the different forms of sexual harassment to ask employees such incidences have happened to them.

Are women experiencing any forms of discrimination or microaggressions in the workplace? Think about the types of discrimination they might face and develop questions around these topics.

Are men receiving adequate mental health support, especially in countries where accessing these services is taboo for men? Think about some questions that would specifically identify gender differences in mental health.

- Carefully explain surveys to employees, particularly those that ask staff to reflect on sensitive issues. Ensure employees understand why you are conducting the survey and how you will use the results. It is important that the organization guarantees complete confidentiality.

CASE STUDY – IMO STATE WATER AND SEWAGE CORPORATION (ISWSC): ENGAGING MEN ON SENSITIVE TOPICS

ISWSC, a water utility in Nigeria, surveyed 53 male employees, including several in management, to assess the extent to which harmful perceptions about women in the company might hinder gender equality. The survey covered various sensitive issues around gender bias, stereotypes, and discrimination. They found that 71 percent of the men believed that harmful gender stereotypes about women and men existed at the company. The survey also revealed that men feared losing power, experiencing social humiliation, or losing workplace opportunities if women were treated as equals. In addition, only five percent of the men surveyed believed that women could contribute to technical roles, and 64 percent believed that domestic work, raising children, and caring for the sick and elderly are women's responsibilities. To obtain the most open and honest responses, the survey team ensured that the men felt comfortable answering these questions by guaranteeing that the survey would be confidential and that they would not receive any retribution for any of their points of view.

The survey results helped ISWSC develop five top strategies for a male engagement at the company: 1. Accept responsibility to end gender discrimination at work; 2. Tell peers about one's own commitment to a gender-inclusive workplace; 3. Do not shame/humiliate men who do not fit a particular view of manhood; 4. Mentor/support emerging women leaders; and 5. Do not interrupt women in meetings but do validate their opinions. ISWSC also used the results of this survey to hold a male engagement workshop to continue to talk about these topics with the men. The men found the workshop helpful and wanted to know how to become more involved in supporting gender equality, resulting in more male champions at ISWSC.

OTHER TYPES OF SURVEYS

There are many other types of surveys that an organization can conduct. In some cases, companies may also benefit from studying populations outside their employee base, for example, to better understand the talent pool or labor market. In other cases, a company might be interested in facilitating a customer satisfaction survey. This type of survey should also consider the unique needs and perceptions of female customers compared to male customers.

Engendering Industries also produced a case study with two different methods for accessing external data available for download on USAID's website.

TIP: THESE SURVEYS MUST GUARANTEE CONFIDENTIALITY AND MAINTAIN ETHICAL STANDARDS SINCE THEY INVOLVE RESPONDENTS OUTSIDE THE COMPANY.

Some examples of other types of surveys might be:

- Labor market studies to better understand the talent pool or labor market.

- Market studies that survey several companies at the national or local level contribute to a body of research in the industry.

- Customer surveys that measure customer satisfaction with the company and its services.

- Customer analysis surveys assess consumers' demographics, interests, and behavior.

CASE STUDY – DISTRIBUIDORA DE ELECTRICIDAD DEL SUR (DELSUR) LABOR MARKET SURVEY

Through funding provided by Engendering Industries, **DELSUR,** a utility company in El Salvador, organized a labor market study of the Salvadoran market specifically focused on employment prospects for female students of technical careers relevant to the local energy sector—the first of its kind in El Salvador. DELSUR initiated the study using funds from USAID's Engendering Industries small grants fund. The General Superintendency for Electricity and Telecommunications (SIGET) and the Minister of Economy of El Salvador endorsed the study.

DELSUR invited eighty companies that comprise the local energy sector to participate in the survey. Because not every company was familiar with the focus on gender equality, the survey team carried out a gender equality 101 training[1] and took extra measures to encourage survey participation. As a result, thirty-five companies from the Salvadoran local energy sector took the survey.

In a follow-on workshop, the DELSUR team, in collaboration with other companies who completed the survey, used the survey data to create a roadmap for the energy sector to reduce the gender gap in female employment in the energy sector over the next 10-15 years. Furthermore, as a direct outcome of the survey, DELSUR established a strategic alliance with the non-governmental organization Plan International to execute the "Educatech" Project to encourage more girls and young women to study technical careers in the sector and STEM (science, technology, mathematics, and engineering). The initiative will train more than 3,000 girls and 54 teachers in STEM skills and sensitize 7,000 parents in 18 schools in the Department of La Libertad to highlight the value and importance of their daughters studying STEM.[2] Ultimately it will increase the number of women with the skills required to perform technical work in the electricity sector.

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1 See Engendering Industries' Gender 101 training here: https://www.usaid.gov/engendering-industries/gender-101-training
2 Alas, E. 13 Aug 2021. *DELSUR Seeks to Reduce the Gender Gap with Educational Programs*. https://dinero.com.sv/en/business/item/778-delsur-seeks-to-reduce-the-gender-gap-with-educational-programs.html

BEST PRACTICES IN SURVEY DESIGN, DATA COLLECTION, AND ANALYSIS

BUILDING TRUST AND CAPACITY AMONG PARTICIPANTS

Depending on the type of survey conducted, there are essential factors to keep in mind in survey design, including:

- Whether the survey should be anonymous or confidential

- What type of demographic data should be collected

- How companies should deliver it to employees

- How companies should use the results

PRE-SURVEY COMMUNICATION

Targeted communications, such as pre-survey trainings or orientations, build trust among participants and increase the accuracy of results. Pre-survey information sessions orient respondents to the survey's purpose, enhance their understanding of the topic, and ensure their comfort level with the survey method. Leaders should strategically use communication to generate interest and motivate participation. Survey teams should design and communicate the survey with employees to make them feel safe about answering questions honestly, without fear of backlash, especially on more sensitive topics such as discrimination or sexual harassment.

Above: *Engendering Industries partner DELSUR "Be a Part of Equity for Progress!" Campaign*

Surveys that are properly communicated tend to have the best outcomes in terms of response rate and usefulness of data.

Communication is also essential to set appropriate expectations for leadership and staff alike. Best practices include being transparent with respondents about how the survey results will be used and any constraints and frequently updating respondents about the data collection and analysis process status. Once the results are analyzed and reviewed by leadership, they should be shared widely with the respondents and company staff and acted upon within a reasonable timeframe.

DECIDING WHETHER TO CONDUCT AN ANONYMOUS OR CONFIDENTIAL SURVEY

To obtain high-quality results with actionable data, respondents must be willing and able to respond honestly to the survey. Therefore, organizations must ensure survey participants are adequately knowledgeable and can provide informed consent aligned with safety and ethical protocols. For a template on obtaining informed consent, please see Annex B. Inform respondents if the survey will be anonymous, if their information will be kept confidential, and how those measures will be guaranteed. Only then will they provide honest and valuable feedback.

PROTECTING PERSONALLY IDENTIFIABLE INFORMATION (PII)

PII is any information that can be used to trace a respondent's identity, alone or combined with other information linked or linkable to a specific individual. Examples of PII include an individual's name, address, telephone number, age, gender, sex, ethnicity, race, personal opinions or views, or any other demographic information asked in the survey. If a company decides to collect PII, it is essential to collect only minimal data to protect respondents' identities. Collecting multiple demographic information might allow others to identify the respondent, so minimizing this data collection is critical.

It is important to safeguard any PII collected, especially if the survey discusses sensitive topics such as sexual harassment, GBV, sexual orientation, sexual identity, gender-based discrimination, or any other issues considered sensitive in the country or cultural context. Therefore, when administering a survey on these topics, respondents must feel safe and be assured that their answers will not be traced back to them.

Another case where survey respondents might need additional guarantees that their PII will be protected is in employee opinion surveys that discuss harmful gender norms or opinions about controversial topics (LGBTQI+ rights, abortion access, etc.). Employees must be guaranteed not to face retribution for their views or be perceived differently based on their responses. This also underscores the critical need to protect PII.

Issues that may impact privacy protection must be resolved in the preliminary stages of the survey design. Keep the following considerations in mind during the design phase:

• Who will conduct the survey (internal employees or a third party such as an external consultant or online survey provider)? What is the gender balance of the survey team?

• What is the most appropriate survey method and tool to use?

• Where will the survey be conducted to ensure the privacy of each respondent?

- Is it necessary to collect PII?

- Which demographic data are most important to collect, such as gender, sex, age, nationality, race, etc.?

Regardless of who conducts the survey, the collection of PII must be done with consent, and the information must be kept confidential under local legal requirements and best practices. Examples of safeguarding PII include allowing only the survey team access to the individual-level results or maintaining secure files in password protected or encrypted database. Data aggregation is another common way to protect privacy. For example, aggregated data and summary statistics can be used rather than reporting individual-level results, such as values averaged over a population group.

GETTING STARTED WITH SURVEY DESIGN

IDENTIFYING THE PURPOSE OF THE SURVEY

It is first important to define the purpose of the survey, beginning with what information the company wants to learn and from whom it wants to learn.

Here are some questions to consider:

- What are you trying to measure?

- What assumptions do you want to test?

- What are the core topic areas you want to understand (i.e., perceptions of gender roles, opportunities for career advancement, particularly for women and underrepresented groups, work-life balance, feeling of inclusion, feeling of safety or fear of sexual harassment/ GBV, etc.?)

- Who are the key group(s) of both men and women stakeholders you need to hear from (e.g., technical staff, management)?

Before the design phase, it is crucial to define the goals the organization hopes to achieve by disseminating an employee survey. Clearly defined goals will help narrow the scope of the survey questions.

QUANTITATIVE VERSUS QUALITATIVE DATA

QUANTITATIVE: NUMERICAL OR MEASURABLE DATA THAT MIGHT INCLUDE:	QUALITATIVE: INTERPRETIVE OR DESCRIPTIVE DATA THAT MIGHT INCLUDE:
• Traditional surveys • Closed questions • Multiple-choice responses • Understanding how much or how often (e.g. prevalence, numerical amounts, etc.)	• Focus groups or interviews • Open-ended questions • Anecdotal evidence • Understanding the why or how (e.g. underlying reasons, causes, etc.)

SURVEY DESIGN PROCESS

Engendering Industries recommends using a "mixed methods" approach to data collection and analysis. For surveys, this involves using quantitative and qualitative questions that will strengthen the credibility of the results and provide a more nuanced analysis. Qualitative data collection methods validate and contextualize survey findings.

MODALITY OF SURVEY ADMINISTRATION

One of the most critical decisions in the survey development process is to determine how to collect and analyze data. This is referred to as survey modality or mode. Some surveys include email, online surveys, paper, and interviews with trained enumerators. However, some modalities are more practical than others. For example:

QUANTITATIVE TOOLS:

- **Online Surveys** are typically cost-effective, can reach the maximum number of people, and provide accurate survey data. Some examples of online survey tools include Google Forms (a widely used free tool), SurveyMonkey (preferred for short surveys), Typeform (the most user-friendly tool), SoGoSurvey (which provides an unlimited number of surveys and questions per survey).

- **Paper Surveys** are more useful where laptops, computers, and tablets are not accessible. This method helps collect survey data in field research where access to the Internet is limited. The paper version of the survey may be easier for respondents to fill out. Still, it will be harder for the researchers to input the data in excel, Stata, or PowerBi (or any tools used) for analysis. It is time-consuming and will allow for more errors when entering the collected data.

- **Email surveys** are efficient for disseminating to a select targeted group or for groups that might not work in the same location. They can be distributed in two ways. First is an embedded survey, which is included directly in the body of an email. Respondents must provide feedback now by email, preventing anonymity. Second is a redirect survey which allows anonymity, where the respondent follows a link to marketing software or Customer Relationship Management (CRM) tools such as Salesforce, MailChimp, ActiveCampaign, Intercom, etc.

DETERMINING SURVEY TYPE TEMPLATE

	Anonymous?	Easy for respondent?	Low cost to administer?	Low effort to administer?	Likely to be completed quickly?
Written questionnaire	Yes	Yes	Yes	Yes	No
Face-to-face interviews	Yes (non-dept interviewers)	Yes	No	No	No
Telephone interviews	Yes (non-dept interviewers)	Yes	Yes	No	Yes
Focus group	No	No	No	No	No
E-mail survey	No	Yes	Yes	Yes	Yes
Web-based survey	Yes	Yes	Yes	Yes	Yes

Source: ASQ. What is a Data Collection Survey? https://asq.org/quality-resources/survey. Accessed 13.10.2022.

- **Face-to-face Surveys** are based on personal interaction. They can be beneficial if literacy or comfort with digital platforms is limited. The downsides of face-to-face interviews are the potential for interviewer bias, the high cost of administering the survey per respondent, geographical limitations if respondents are not in the same location as the survey administrator, lack of anonymity, and time pressure on respondents.

QUALITATIVE TOOLS:

While this knowledge guide focuses primarily on quantitative surveys, qualitative methods are also an important and valuable tool. Here are some practical qualitative tools to keep in mind:

- **Focus Group Discussions:** Conducting focus group discussions with a small group of participants can effectively generate discussion and yield important findings. Organizing groups based on similar characteristics can be helpful to ensure that participants are comfortable discussing sensitive issues. For example, same-sex groups may help women to open up in ways they would not if men were in the room. Similarly, organizing a group with only junior-level professionals may ensure that participants are comfortable speaking up without their supervisor in the room. The Workplace Gender Equality Agency and Society for Human Resource Management offer some helpful guides on conducting focus groups.

- **Key Informant Interviews:** An interview with a single participant with a unique perspective on a research topic can help gather more profound results. These interviews also present an opportunity to ask probing questions and collect more nuanced information about specific topics of interest. The Community Toolbox offers a helpful guide on conducting these interviews.

USING TWO ROUNDS OF DATA COLLECTION TO VALIDATE FINDINGS

It is most common to have two rounds of data collection. Either quantitative or qualitative data is gathered in an initial round of data collection, and the results inform a second round of data collection (targeting quantitative or qualitative data, whichever was not collected in the first round). The information collected from both rounds is related, as the second round builds on the first.

Option 1: Qualitative to Quantitative

Gathering data in this might help organizations learn something new about a specific issue identified in qualitative data collection. For example, while conducting interviews (qualitative) with a few employees, a team might notice multiple references to workplace sexual harassment. Therefore, they might choose to develop a questionnaire (quantitative) to dive deeper into this issue. In this example, the survey could be sent to all employees to see how many staff have experienced or witnessed sexual harassment and then be able to disaggregate data by department, seniority level, etc.

Option 2: Quantitative to Qualitative

Gathering data in this order might be helpful to shed light on unexpected findings found in the quantitative data. For example, suppose a survey (quantitative) reveals that a higher percentage of women are actively looking to leave the company. In that case, the survey team might consider holding focus group discussions (qualitative) to learn more about why women are thinking about leaving. A focus group creates an environment for open ended questions and thoughtful answers that get to the "the why" of quantitative survey results.

SURVEY DO'S AND DON'TS

DOs	DONTs
Obtain senior leadership buy-in for the survey: Ensure senior management approves and supports the initiative.	*Make the survey too long:* Shorter surveys with straightforward, concise questions result in a better response rate.
Understand your resources: Identify the knowledge and capacity to conduct the survey internally, analyze the data and implement improvements. If necessary, consider using an external firm to support if funding is available and in areas lacking expertise.	*Ask leading questions:* These types of questions can make respondents feel that there is a "right" answer, possibly leading them to answer dishonestly and ultimately compromising the accuracy of the data. (For example, "How satisfied are you with our benefits package?")
Identify the purpose of the survey: Make sure the organization's goals in administering the survey are clear. This will help to ensure that the survey results answer the organization's questions.	*Use too many open-ended questions:* While open-ended questions can help collect recommendations, they should be limited to keep the survey responses manageable and make them easier to analyze and actionable. (For example, "Tell us about your relationship with your supervisor.")
Keep the survey simple: Ask as few questions as possible, limiting questions to what is essential to learn from the survey. Employees are more likely to complete surveys if they are relatively short. Also, a brief survey will have easier results to compile and share.	
Ask actionable questions: Share potential survey questions with management team members and ensure that survey results can lead to action if necessary.	*Use personal identifiable information (PII):* PII such as employee's home address, phone numbers, national identification numbers, etc., should not be requested in the survey.
Share the results as widely as possible: Sharing the results across the organization, especially with key stakeholders and managers with authority is the only way the survey will lead to improvement within the organization. Once leadership has received a briefing on results, share outcomes with respondents.	*Use double-barreled questions:* Questions that connect multiple ideas can produce confusing results. For example, "should women occupy decision- making positions and be promoted to technical positions?" Instead, this could be phrased as two separate questions:
Conduct Employee Engagement Surveys Annually: Organizations benefit from annual staff engagement surveys, such as gender equality, diversity, and inclusion benchmark surveys, which provide actionable intelligence that can lead to improvement within the organization.	• Should women occupy leadership and decision-making positions?
Focus on using closed-ended questions: Multiple choice or checkbox questions are simple options that are easy for employees to answer and easy for the organization to analyze.	• Should the company appoint qualified women to technical positions?
Guarantee anonymity or confidentiality (note: a survey cannot be both): Guaranteeing anonymity or confidentiality is crucial to getting a high response rate with genuine feedback.	

FURTHER RESOURCES

General Survey Resources:

- Toolkit on designing, managing, and analyzing employee surveys: [Managing Employee Surveys](#) (Society for Human Resource Management)

- Creating effective survey questions: [Surveys 101](#) (Survey Monkey) and [Gender in the Workplace Survey Template](#) (Survey Monkey)

- Learning about the importance of disaggregating data, even during times of crisis: [Why Data Disaggregation is Key During a Pandemic](#) (Pan American Health Organization and World Health Organization)

- Combine qualitative and quantitative data: [Data collection – Mixed Methods](#) (Urban Anthropology)

- Tools, resources, and sample surveys: [Employee Surveys to Measure the Entire Employee Experience](#) (Decision Wise)

Employee Engagement Resources:

- Improving employee engagement through the use of surveys: [Fixing Poor Engagement Starts with Understanding Its Cause](#) (Society for Human Resource Management)

- Sample employee engagement questions: [20 Employee Engagement Survey Questions You Should Ask](#) (Culture Amp)

Employee Satisfaction or Opinion Resources:

- Insights on women's job satisfaction: [Employee Satisfaction: The Female Perspective](#) (Forbes)

- Guide on employee satisfaction surveys: [Employee Satisfaction Surveys: What are They, Best Practice and Sample Employee Satisfaction Survey Questions](#) (Qualtrics)

- Sample survey questions: [19 Employee Satisfaction Survey Questions You Need To Ask in 2022](#) (Spark Bay)

Organizational Culture or Climate Resources:

- Surveys related to sexual harassment and GBV: [Workplace Climate Surveys](#) (Workplaces Respond)

- Examples of survey questions related to gender discrimination: [Gender Discrimination Survey Questions + Sample Questionnaire Template](#) (QuestionPro)

ANNEX A: SAMPLE SURVEY QUESTIONS BY THEMATIC AREA

The following survey questions are not exhaustive but list a few sample questions based on the themes discussed in this guide. The resources provided in the previous section also contain sample questions for other ideas.

Employee Engagement

- On a scale of 1 (not at all valuable) to 5 (extremely valuable), please rate the value of [insert program] for you.

- On a scale of 1 (strongly disagree) to 5 (strongly agree), after participating in [insert program], I feel more socially connected in the workplace than before.

- On a scale of 1 (strongly disagree) to 5 (strongly agree), after participating in [insert program], I feel more confident about my career path in this organization than before.

- Compared to one year ago, do you feel more or less loyal to this organization? Response options: More; Less; No Change.

- On a scale of 1 (strongly disagree) to 5 (strongly agree), how meaningful do you find your work at the organization?

- The company will be creating a leadership development program. Which of the following would you likely participate in (check all that apply)? 1. Mentoring with you as the mentee; 2. Mentoring with you as the mentor; 3. networking events; 4. leadership skills training; 5. job shadowing in other departments; 6. conferences in the industry.

Employee Satisfaction or Opinion

- On a scale of 1 (not at all important) to 5 (extremely important), how important are the following benefits to you? 1. childcare; 2. maternity/paternity leave; 3. health care; 4. family leave; 5. flexible work schedules; 6. tuition reimbursement; 7. retirement savings; 8. mental health services; 9. fitness center or other benefits; 10. lactation rooms (add other benefits as relevant to your organization)?

- On a scale of 1 (strongly disagree) to 5 (strongly agree), please rate the extent to which you agree with the following statement: "I have the flexibility I need to manage my work and home responsibilities and interests.

- On a scale of 1 (definitely would not) to 5 (definitely would), how likely would you be to recommend this organization to your male friends.

- On a scale of 1 (definitely would not) to 5 (definitely would), how likely would you be to recommend this organization to your female friends.

- In your opinion, what changes or new benefits at the organization would improve your work-life balance?

Organizational Culture or Climate

- On a scale of 1 (strongly disagree) to 5 (strongly agree), please rate the extent to which you agree with the following statements:

  - I feel safe using company-provided toilets when working in rural areas.

  - I feel safe staying overnight at the company quarters.

  - I feel safe working off-site if I am the only woman or man on a team.

  - I feel safe going into communities and visiting customers in their homes.

- Given the current policies and procedures for addressing sexual harassment and GBV at the company, would you feel comfortable reporting an experience of the following (please check all that apply)?

  - If someone made an offensive remark about my appearance, body, or sexual activities.

  - If a colleague made unwanted attempts to establish a romantic sexual relationship with me.

  - If my supervisor made unwanted attempts to establish a romantic sexual relationship with me.

  - If I was subjected to offensive jokes that are sexual or discriminatory.

  - If I was touched in a way that made me feel uncomfortable.

  - If someone showed me images or videos that are inappropriate for the workplace.

- On a scale of 1 (strongly disagree) to 5 (strongly agree), please rate the extent to which you agree with the following statements:

  - I feel well respected by my supervisor/co-workers.

  - Management shows, through action, that diversity and gender equality are one of the company's highest priorities.

  - Job promotions are fair and based on the principles of equality.

  - The performance of women and men is evaluated with the same accuracy OR with fair judgment.

  - Diverse perspectives are valued and encouraged in my team.

  - I am comfortable voicing my ideas and opinions, even if they are different from others.

  - In my department or work unit, people are treated respectfully, regardless of their differences.

  - I feel a good gender balance within the organization.

  - The behavior of our senior leadership team is consistent with this company's value.

  - My CEO prioritizes gender diversity.

  - Commitment to gender diversity is important because it contributes to a positive image of the company.

  - Promotions at this company are based on fair and objective criteria.

- On a scale of 1 (never) to 5 (always), how often do you worry about your mental health?

ANNEX B: INFORMED CONSENT TEMPLATE

Use the following template to obtain informed consent from participants in a survey or focus group at the company. The template may be adapted based on national laws or the cultural context of a particular country.

Dear Participant,

My Name is [NAME], and I am an [TITLE] at [ORGANIZATION]. We are surveying employees to learn more about [INSERT TOPICS] within our organization. The information gathered from this survey will be used to [INSERT PURPOSE OF THE SURVEY] and will only be shared with relevant team members. Your responses will be [confidential/anonymous] and will not be shared outside our survey team. Furthermore, we will not share any personally identifiable information when sharing results outside our survey team.

If you are willing to participate in this survey, it will take you approximately [INSERT TIME]. You may stop at any time or skip any questions you do not wish to answer. Participating in this survey is voluntary and will not affect your job if you decline to participate.

If you agree to participate, please complete the information below to indicate that you consent to participate in the study.

Participant's signature: _____
Printed Name: _____
Date: _____

If you have any questions about this survey, please contact [CONTACT INFORMATION].