

SEPTEMBER 2018

Diversity Reporting

Question pack and process for data collection



Introduction

As Champions for Change, we believe that to achieve our vision of a new generation of diverse leaders driving New Zealand's future economic and social prosperity, we need to set clear targets and hold ourselves accountable for our results.

Developing clear targets and metrics on diversity is critical to breaking entrenched patterns that inhibit diverse and inclusive leadership. As Champions, we are stepping up to take the lead in this area and to hold ourselves accountable to an agreed set of consistent reporting standards to benchmark our efforts and progress towards achieving truly diverse and inclusive leadership.

By voluntarily coming together to share our workforce diversity data, we intend to create a much richer understanding of how New Zealand is making the best use of our people resources to achieve social and economic prosperity.

On an individual level, organizations will be able to learn what is possible through benchmarking against each other, and on a national level, we will see clearly where we all need to improve, where collaborative action, potentially across sectors, is required, and how our efforts are resulting in change over time.



Supporting documentation

This document provides the specific questions and process for data collection, and must be read alongside companion documents:

- Diversity Reporting Framework – Covering both the reporting requirements for individual organisations and setting out how the combined reporting and analysis will be carried out.
- Guidelines for Reporting Organisations – Provides a practical guide for organisations on how to collect, analyse and report on the required gender and ethnicity workforce and Board data, and includes case studies and links to additional resources.
- Reporting Template – An excel template demonstrating the preferred format for submitting data.

All support materials are available at www.championsforchange.nz, under the 'Resources' section.



Communicating the purpose of reporting to employees

The following proposed copy can accompany your mode of data collection, to communicate the purpose of collecting employee data in order to better understand diversity and inclusion challenges. It is important employees feel safe sharing their information and that they understand the bigger picture as to 'why' this information is important.¹ Please feel welcome to amend this draft copy to best fit your organization.

Proposed copy: As a member of [Champions for Change](#), diversity and inclusion is a critical focus for <insert organization> and our commitment to a new generation of diverse leaders driving New Zealand's future economic and social prosperity. As a Champion organization, we are dedicated to creating a better workplace for generations to come – one where all New Zealanders can feel safe and valued in their workplace and wider community.

As part of our Champion commitment, we are implementing a measurement and accountability initiative to better understand our people - this means you. By understanding who currently makes up our workforce, we can then look to identify gaps in diverse representation and clearly track our progress.

You are under no obligation to provide any personal information that you do not wish to share. All information provided will be held in confidence and according to the requirements of the Privacy Act 1993, and any reporting will be conducted at an aggregated, company-wide level only. As both gender and ethnicity are matters of personal identification, you have the opportunity to change your own data at any time, and can do so by <insert company process>. We value you as a unique individual, and look forward to learning more about our people. Thank you in advance for considering the following questions.

1. See ***Guidelines for Reporting Organizations***, Pg.7, for further guidance, at www.championsforchange.nz



What data fields will need to be supplied?

[companies can chose individual-level or aggregated reporting]

DATA FIELD	DEFINITION	PROPOSED QUESTIONS
Company Name	The company for which the employee is employed	
Unique ID	A unique ID that de-identifies the employee (i.e. not their employee number, but to be kept the same for each employee over future years to track movements)	
Work category	The standard occupational category for the employee. This include KMP (key management personnel), other execs/general managers, senior managers, other managers, non-managers, Board). Refer to reporting framework for further detail.	
Gender	The gender with which the employee associates (including "male", "female", "gender diverse" and "not stated")	Which gender do you identify as? (Guidelines for Reporting Organisations, pg 10)
Ethnicity 1	The ethnic group or groups (up to 3 selections) that the employee identifies with (22 options as per the statistics NZ Level 2 classifications). Refer to reporting framework for further details.	Which ethnic group do you belong to? (Guidelines for Reporting Organisations, pg 11)
Ethnicity 2		
Ethnicity 3		
Full-time/part-time/casual	The mode of employment for the employee including full-time, part-time or casual basis	Do you work full-time, part-time or as a casual?
Permanent/contract/casual	The contractual terms of employment for the employee including permanent, contract or casual	Are you a permanent, contract or casual employee?

Determined by internal company data team

Note: companies can chose to report data at aggregate level, in which case "Unique ID" is not required

Requested of the employee via survey or other means

Optional at line item level. Either supplied by the employee or via internal data extracts



Support for asking which gender employees associate with

Organizations should ask employees which gender they identify as, giving at least the options of “male”, “female”, and “gender diverse”, and may consider the following supporting copy.

Gender identity may be defined as “an individual’s internal sense of being wholly female, wholly male, or having aspects of female and/or male”. It refers to each person’s deeply felt internal and individual experience of gender, which may or may not correspond with the sex recorded at birth. A person’s gender identity can change over their lifetime, and can be expressed in a number of ways and forms. The concept of “gender diverse” is having a gender identity or gender expression that differs from a given society’s dominant gender roles. We look forward to learning more about the gender identity of our people.

Question: Which gender do you identify as?²

2. See ***Guidelines for Reporting Organizations***, Pg.10, AND ***Reporting Template*** for further guidance, available at www.championsforchange.nz



Support for asking which ethnic group/s employees identify with

Organizations should use the standard Census question for asking about ethnicity, and may consider the following supporting copy.

New Zealand is unique internationally in basing our concept of ethnicity solely on the basis of cultural affiliation and self-identification, rather than any concept of race, ancestry, nationality or citizenship - and the biological, historical and legal concepts bound up in these. In New Zealand, ethnicity is self-identified and you can belong to more than one ethnic group. We look forward to learning more about the ethnicity of our people.

Question: Which ethnic group do you belong to?

Please select up to three options that apply to you.³

3. See **Guidelines for Reporting Organizations**, Pg.11, AND **Reporting Template** for further guidance and a breakdown of the full 22 categories, available at www.championsforchange.nz



What format should data be supplied in?

[Option 1 – Individual level]

Access to employee-level data allows cross-factor analysis to take place. However, there is also an option to supply the data at the aggregated level if you prefer. Below is a snapshot of ‘Option 1’ - the individual-level format for supplying data:

Diversity Dataset for Company X (when submitting individual level data)

Number of employees used to populate statistics (assuming same as number of employees in company)

Company Name	Unique ID	Work category	Gender	Ethnicity 1	Ethnicity 2	Ethnicity 3	Full-time/part-time/casual	Permanent/ contract/ casual
Company A	123456	Senior manager	Female	European			FT	Permanent
Company A	736479	KMP	Male	Maori	Fijian	Tongan	PT	Permanent
Company A	583629	Non-manager	Female	Filipino	English		Casual	Casual
Company A	395729	KMP	Female	New Zealander	Maori		FT	Contract

- The required data to be supplied is a unique (de-identified) record for each employee which will allow the Champions for Change reporting team to quickly analyze data to understand underlying trends cutting across work category, gender, ethnicity, age and employment mode
- The data should be supplied in Excel format or if too large in an Access database



What format should data be supplied in?

[Option 2 – Aggregated level]

You can decide to report the data at an aggregated level, however please note this will limit your ability to perform cross-factor analysis. Below is a snapshot of the recommended format for supplying aggregated-level data:

Diversity Dataset for Company X (when submitting aggregate level data)

Number of employees in the organisation

Number of employees used to populate these statistics

Gender split

	Board	KMP	Other Execs/GMs	Senior Management	Other Managers	Non-Managers
Male						
Female						
Gender diverse						
Not stated		100%	100%	100%	100%	100%

Ethnicity split

	Board	KMP	Other Execs/GMs	Senior Management	Other Managers	Non-Managers
New Zealander						
European						
English						
Australian						
Dutch						
Other European						
Maori						
Samoan						
Cook Islands Maori						
Tongan						
Niuean						
Tokelauan						
Fijian						
Other Pacific Peoples						
Filipino						
South East Asian						
Chinese						
Indian						
Other Asian						
Middle Eastern						
Latin American						
African						
Other						
Not stated		100%	100%	100%	100%	100%

- The data should be supplied in Excel format or if too large in an Access database
4. Please communicate directly with the Champions for Change Programme Manager regarding any challenges with collating data in this format, contact details available at championsforchange.nz



Questions for implementation readiness

Note to Implementation Leads: Please answer the below questions for implementation readiness and service requirements, and forward your response to the Champions for Change Reporting Team at champions@globalwomen.org.nz

1. **Please confirm your commitment to reporting timeframes (option a or b):**
 - a. Yes, we are committed to early adoption of the Reporting Framework in year one. We will collect data for the 1 April 2017 to 31 March 2018 reporting year, to then deliver our first report in mid-2018
 - b. Yes, we are committed to the Reporting Framework however will not be able to report until year two. We will focus on preparation in year one to collect data for the 1 April 2018 to 31 March 2019 reporting year, to then deliver our first report in mid-2019
2. **What month would you expect to provide your data to the Champions for Change reporting team?**
3. **How will you approach collecting the proposed data and will you need support to plan this?**
4. **What considerations (if any) will you face with gathering this data? For example:**
 - We do not have the data in one database and will need to run extracts that cross correlate data
 - We do not have the same work categories and will need to map our job titles to the recommended categories
 - Our systems cannot store this data and will need to be adjusted to accommodate this
 - We do not currently survey our employees and will need to implement a new process to do so
5. **Are there any other considerations you foresee with providing this data that you may require help on?**

Thank you