# A BEGINNER'S GUIDE TO DATA COLLECTION METHODS

This is a supporting document for the Workforce Data Equality Guide which can be accessed here.

In the main guide we focus on inputting employee workforce numbers into your HR information system (HRIS). However, throughout it we emphasise the importance of using these numbers against a wider understanding of individuals' experiences. For this there will be a need to collect qualitative data and the below introduces you to the different methods that may be of use.

## SURVEYS

Using surveys as a data collection tool combines both quantitative and qualitative aspects of data collection. Surveys are a good way to collect large samples of data quickly. They are a familiar method to most and businesses can invest in tools that support with analysis.

By integrating personal data questions up front it is possible to break down answers by characteristics, disaggregate them an apply an intersectional lens. Surveys also can be anonymous, an effective way of increasing response rates especially on sensitive subjects.

**Top Tip:** This information is normally collected separately to the HRIS information as surveys are often anonymous. Make sure that the equalities data questions however are the same as those asked in other instances - standardisation will help you to compare data sets.

### Annual surveys

It is likely that your organisation has an annual schedule of internal data collection surveys that you are already aware of. Integrating inclusion metrics into existing surveys such as employees' engagement or wellbeing exercises present an opportunity to connect with existing activities so as to deepen internal data.

In these longer surveys companies should understand the importance of a mix of tick box responses and open text questions. Be aware that your employees will have a limited capacity to fill out lots of open-ended questions, but they are essential to understanding the context behind answers.

From these answers it is possible to.

- Understand whether there are trends occurring in the business or certain departments or geographies that are related to a specific or combination of personal characteristics
- Link particular questions to different stages of the employee lifecycle that you are focusing on and ask specific questions to gain depth and context on issues
- Provide context to tick box answers

### Pulse surveys

The purpose of a pulse survey is to take the temperature of staff on issues, for example health and wellbeing at the present time, and at regular points going forward. They provide a direct line from individual employees to senior management. Pulse surveys usually have no more than five questions to provide a periodic snapshot of employee engagement.

To avoid survey fatigue it may be possible to send some questions to certain groups, for example if you wish to ask carers questions around their experience of Covid-19 you can use your data just to send to that specific group*.

## Focus Groups

Focus groups are an effective way of gathering qualitative data. Where issues are identified, either through employees directly raising concerns or quantitative data highlighting issues, context can be best given by actively listening to individuals affected. Focus groups allow you to get to the root of any problem, understand the stories behind them and hear people's experiences. It is an opportunity to assure employees that it is a priority to address these, but also to allow them to feed into solutions. However, you only get a true reflection of the culture if people feel in a safe space to do so.

### Top tips for effective focus groups

- Have a clear purpose for the session.
- Keep sessions to smaller numbers (10-12 people) to ensure everyone has space to talk.
- Be clear about why the people in the room have been invited. If more people wish to attend the group than you have allocated for discuss putting on additional sessions, so people are not disappointed.
- When talking about potentially sensitive or emotive topics be mindful that an external facilitator may support more open conversations.
- Ensure that the facilitator has the training and background necessary if running sessions on sensitive subjects.
- Be transparent about how notes are recorded and if comments are anonymous or not.
- Consider having a mechanism (potentially survey or interview) where people can follow up 1:1 after the session if not comfortable sharing in the room.
- BITC have often found that employees are more open to conversations when the HR team is not in the sessions. This also applies to an individual's line manager.
- Communicate what was done because of the discussion.

## Interviews

Interviews are another effective way of collecting qualitative data but can be more time consuming than focus groups. Interviews allow for deeper and more open conversations with employees. Using interviews as a method of collecting information can help build trust with employees and allow people to speak more openly without others overhearing.

Be clear if you are collecting data from the interview and do not confuse an informal chat as an opportunity for data collection.

**Top Tip:** In the interviews conducted to compile this guidance, a few companies expressed their frustration that they weren't able to invite individuals with specific characteristics to tailored focus groups and interviews due to the constraints imposed by their privacy statement. If this is something you would like to do ensure you include this in the statement when collecting data.

Alternatively you could look at working with relevant employee networks or doing an open call for individuals who identify with a certain group or have experience of an issue to join the focus groups and interviews.