Worksheet: Apply an age lens to our DEI data

How to use this worksheet:

Incorporate age as another element of your current diversity metrics, and ensure it becomes part of your regular reporting. This worksheet can help you get started.

Who to include in the conversations:

Leaders and members of your DEI team. Be sure to include representation from staff who execute daily front-line tasks in your DEI initiatives, working with employees at all levels of the organization. They will have valuable insights on how to interpret the data you find.

When gathering and analyzing data for DEI goals and metrics, it's important to make sure you can see that data through the lens of age. Without data, it's hard to set goals, measure progress, or identify and address obstacles.

Step 1: Find out where you are gathering DEI data specific to the age of your employees.

1. Print out a copy of your latest DEI metrics reporting.

2. Highlight each reference to any of the following words (or others that are similar): age, aging, age inclusion, generation, senior, junior, succession, emerging.

3. Note any patterns about if and where these words appear in your current DEI metrics reporting: _____ _____ _____ _____ _____

4. Are there any additions or changes you'd like to make in the data that is collected, or the standard report your team uses to digest the data? If so, note them here or on your copy of your DEI metrics report._____ _____ _____ _____

Step 2: Explore the intersection of age with other aspects of diversity for which you already gather data.

1. In your latest DEI metrics reporting, rerun the regular results with this one edit:

   Within each identified employee population for which you already have data, filter the results by age group. You can do so using the birthdate of individual employees if that information is available. Alternatively, you can run the report to simply compare results for employees under age 40, and employees age 40+ since this is the age when employees join a federally protected class.

2. Highlight each area within the results when a specific age group has meaningfully different results than other age groups. For example, you might notice or ask:

    a. Does the data show meaningful differences between men age 40+ and women age 40+?

    b. In a program intended to cultivate a pipeline of leaders, do employees of similar age but with different racial, ethnic, or LGBTQ status all progress at similar rates?

    c. Does the data show varying degrees of age diversity or homogeneity by class of employee (i.e., frontline workers versus knowledge workers)?

    d. Does the data show meaningful differences in age diversity by role or level in the organization?

3. Approach these results with a sense of curiosity. For each, you can discuss:

    a. What could be happening here?

    b. Who or what could help us understand the experiences of these employees?

    c. What additional questions do we want to ask? To whom?

    d. What additional data do we want to start to collect and/or add to our DEI reporting? _____
_____
_____
_____
_____

5. Based on what you've learned, are there any additions or changes you'd like to make in the data that is collected, or the standard report your team uses to digest the data? If so, note them here or on your copy of your DEI metrics report. _____
_____
_____
_____

Step 3: Consider what and to whom you report on your DEI metrics, including age-related data.

1. Jot a list of what DEI reporting you share, and with whom you share it:

    a. C-Suite:

    b. Senior leaders across the organization:

    c. People managers:

    d. Employee Resource Group leaders or members:

    e. All employees with an internal-only report:

    f. Publicly available summary of select data:

    g. Other:

2. Circle each audience in the question above with whom you have highlighted any age-related DEI data, metrics or analysis in the past year.

3. Based on what you've learned, are there any additions or changes you'd like to make in the data you share, or with whom you share it? If so, note them here: _____
_____
_____
_____