

Worksheet: Apply an age lens to our Workforce Management data

How to use this worksheet:

Employee engagement survey data is a valuable way to understand how employees experience the combined effects of all workforce management initiatives.

Use this worksheet to help you analyze your employee engagement survey reports through the lens of age. It can help you identify pockets of both success and opportunities.

Who to include in the conversations:

Team members who lead workforce management initiatives, HR staff who design and execute employee survey efforts.

When gathering and analyzing data to understand how employees experience your workforce management efforts, 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: Identify questions on your organization's regular employee engagement survey that tie to your workforce management efforts. Some may be direct links, but others may be questions where your workforce management efforts are a key influence.

1. Print out a copy of your latest employee engagement report(s).
2. Highlight each question where an employee's response might be considerably influenced by their experience with a workforce management initiative.
3. Note any patterns about which types of questions are related to workforce management efforts. For example, are you gathering data that shows the effects of some programs but not others? Are you asking questions that help you understand how your employees are planning for career longevity in your organization, and what support they want/ need to do this? Can you see if participation in specific workforce management initiatives affects the engagement level of participating employees?

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 employee engagement survey. _____

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

1. In your latest employee engagement reporting (or other reporting you run on specific workforce management programs), 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.

- 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 an initiative intended to support a specific life phase or experience, do employees of similar age but with different racial, ethnic, or LGBTQ status all use it at similar rates? Are there satisfaction rates with that benefit similar?
 - c. If you gather data about specific workforce management initiatives or programs, does the participation rate in each program show that some age groups participate more or less than others?
 - d. If you have designed a specific initiative to reach a target age group among employees (such as a mentoring program, or phased retirement program) what does your data suggest about your effectiveness in reaching that target group? Are there surprising additional pockets of participation that present opportunities?
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 benefits reporting? _____

4. 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 employee engagement report. _____

Step 3: Consider what and to whom you report on your workforce management metrics, including age-related data. This will likely go beyond just the employee engagement survey and may include reports about participation and results from specific initiatives.

1. Jot a list of what benefits 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/ career phase related 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: _____

