

WELCOME TO:



Decoding DEI:
Best Practices for Effective Research
Design & Analysis

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Join us for the Next Webinar in the 2023 Series:

So You Want to do a Mixed-Mode Survey?
Considerations & Design Decisions When Mixing Web &
Mail Modes

Presenter: Kristen Olson

August 14, 2023

1:00 PM – 2:00 PM ET



Please enter your questions in the Q&A box at the bottom of your screen.



Please complete the webinar survey immediately following the session.





DECODING

DEI:

Inclusivity Compliance: A Roadmap to Creating Space for Diverse Voices

July 25, 2023
1:00PM – 2:30PM

Presented by:
Roben Allong & Ya-Chi Hung



Lightbeam

A Microcultural Insights and Strategy Consultancy

WELCOME & INTRODUCTIONS



Roben Allong,
Founder & CEO of Lightbeam Communications

- Qualitative Researcher
- Former President of QRCA
- Specialist in the Analysis and Interpretation of Socio-Economic-Cultural and Micro-Cultural Trends
- Published Author
- Moderator



Ya-Chi Hung,
Associate Director USC Race and Equity Center

- Senior data scientist and survey methodologist specializing in conducting survey research to address systemic equity issues.



WHAT WE WILL DISCUSS TODAY...



Inclusivity Compliance

01

02 Decoding DEI:
Inclusivity
Compliance: A 5-Point
Roadmap to Visioning
the Future

03

A.I. and the Future of
DEI: Inclusivity
Compliance

04

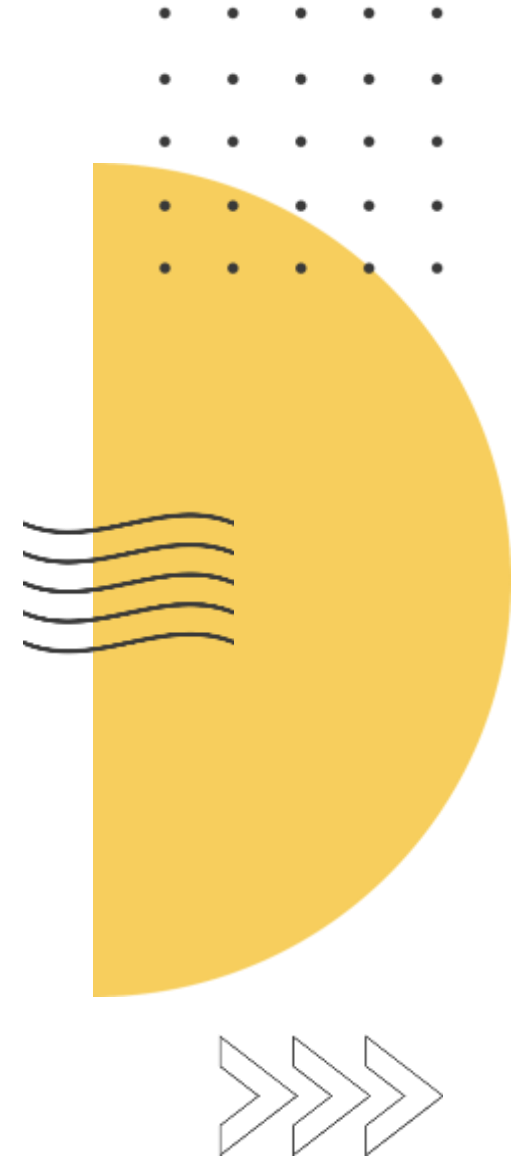
Tips and Takeaways

01

DEI: INCLUSIVITY COMPLIANCE

WHAT IS INCLUSIVITY COMPLIANCE?
AND WHY IS IT BECOMING
INCREASINGLY IMPORTANT?

- Differing Perceptions of DEI: Inclusivity Compliance
- Changing US Demography and Attitudes
- Impact of Social and Cultural Movements
- Technology Evolution (e.g., virtual and artificial intelligence)
- Bottomline Payoff:
 - Audience and revenue growth
 - Innovation for all
 - Category and business leadership
- Costly Missteps

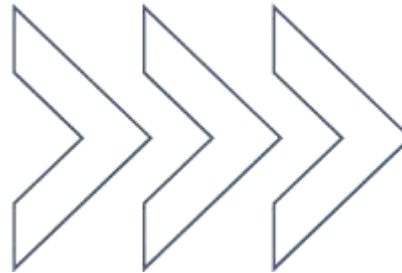


WHAT IS INCLUSIVITY COMPLIANCE?

in·clu·siv·i·ty com·pli·ance

Adhering to policies that help us to recognize and combat inequity by providing equal and equitable access and opportunity to groups who have been excluded and/or marginalized.

This includes avoiding the use of language/lexicon that can be viewed as excluding a particular group.



PERCEPTIONS OF INCLUSIVITY COMPLIANCE DIFFER



RESEARCHER PERSPECTIVE

Comply with internal industry, organizational as well as external government-mandated policies to ensure equal access to and equitable distribution and avoid creating a disparate impact on previously marginalized or excluded groups.



STAKEHOLDER PERSPECTIVE

Comply with government-mandated policies and regulations to ensure accuracy, revenue growth, and ultimately, profitability.



AMERICA'S DEMOGRAPHY IS CHANGING

• •
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0

Majority racial or ethnic groups within Gen Z

33.8M

People belonging to 2+ races (up from 9M in 2010)

27

Common age among all ethnic and racial minorities

2

Decades until the White population falls below 50%

30%

Black population size increase since 2000

53%

Gen Z-ers who identify as multiracial



RECENT INFLUENTIAL SOCIO- CULTURAL MOVEMENTS ...

- Black Lives Matter (BLM)
- #MeToo Movement
- LGBTQ+ Rights
- Standing Rock- Indigenous People
- Cancel Culture

BENEFITS: WHEN COMPLIANCE COMES ACROSS AS AUTHENTIC...



Source: Good Morning America

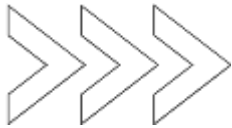
STORY OF FENTY



UNFORCED ERRORS: WHEN COMPLIANCE APPEARS PERFORMATIVE...



STORY OF BUD LIGHT



Source: Wolves and Finance Podcast
Zach DeGregorio, Podcaster, Accountant
117K Subscribers, 600K Views



02

DECODING DEI: INCLUSIVITY COMPLIANCE

A 5-Point Roadmap:

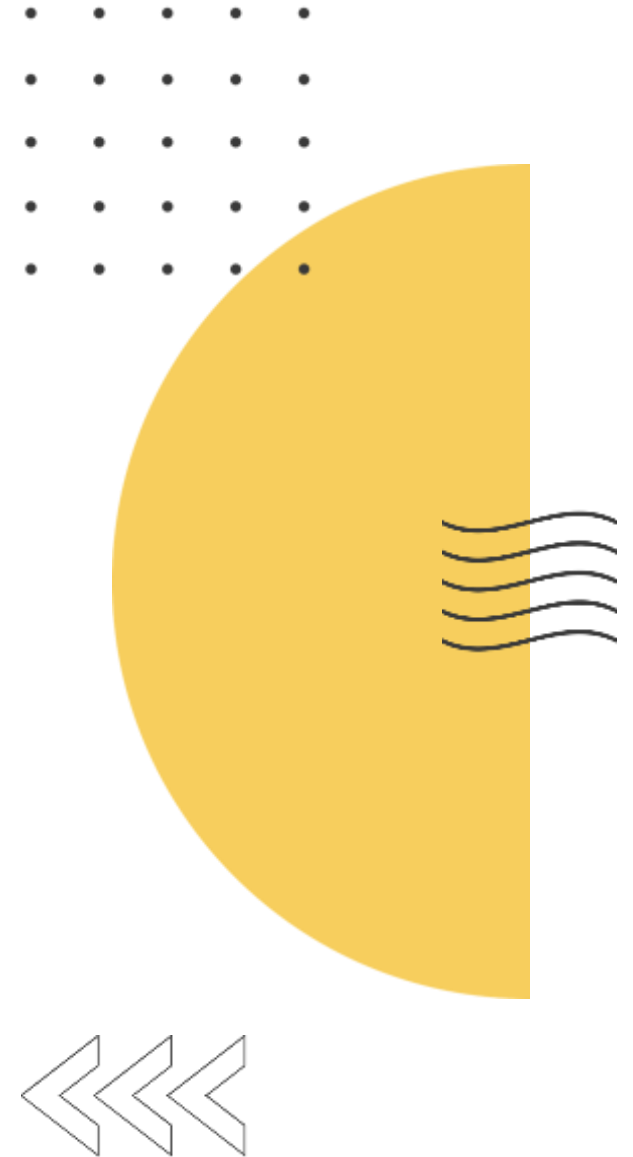
Point 1.:
I- Identify Perspective

Point 2.:
D-Determine Positionality

Point 3.:
**M-Master the Art of Creating
Space**

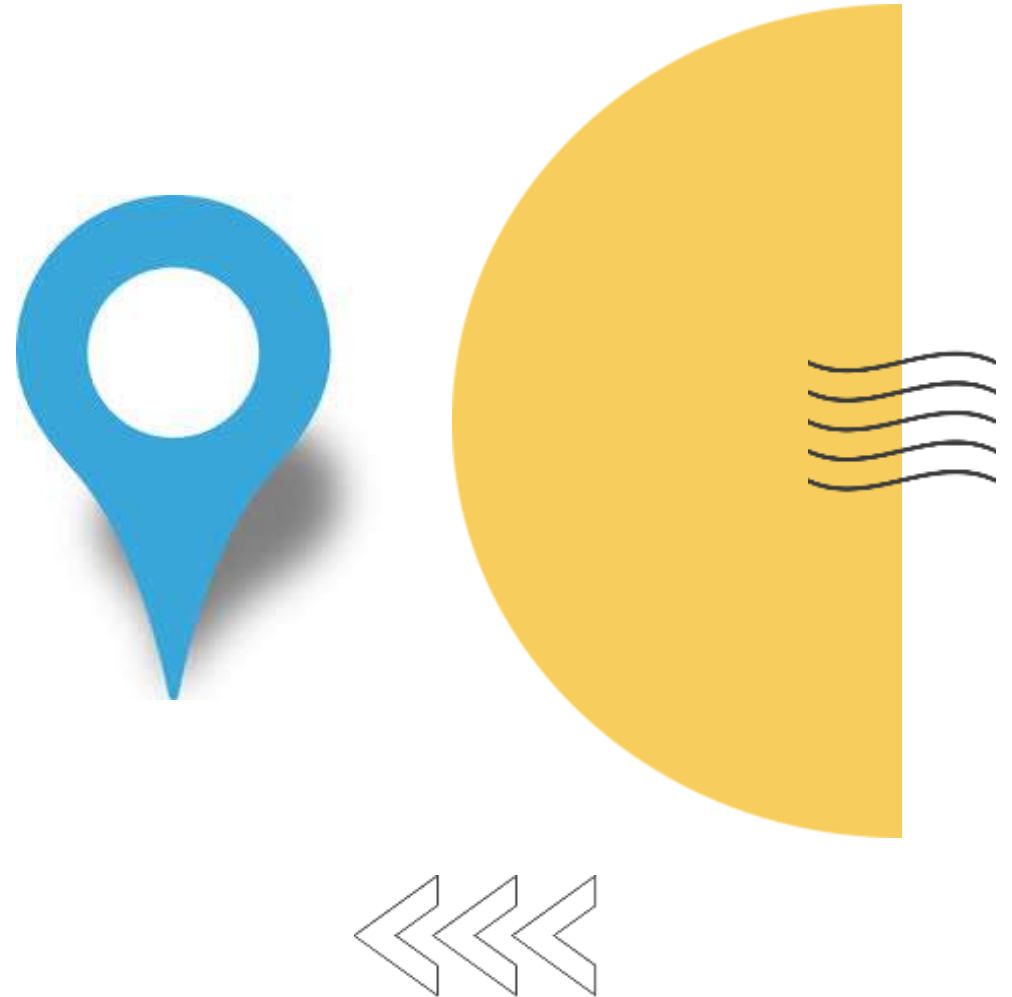
Point 4.:
S-Sustain Engagement

Point 5.:
C-Close the Circle



5-POINT GUIDE = COMPLIANCE GPS

- Eliminate bias and increase impartiality
- Capture diverse perspectives
- Measure equity gaps in experiences and outcomes
- Elevate engagement and authenticity
- Identify potential hot spots that can lead to costly missteps



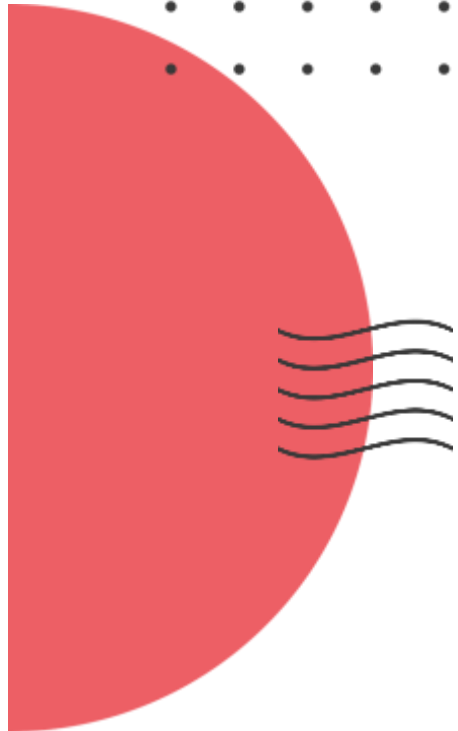
POINT 1: I-IDENTIFY PERSPECTIVE

ACKNOWLEDGE WHAT WE, AS RESEARCH PROFESSIONALS,
BRING TO THE TABLE



QUANT

STEP 1: IDENTIFY PERSPECTIVE



Past

What has been done

What DEI goals have been considered and what has already been implemented



Present

Where we are

What is the current DEI culture



Future

What we will do

How do we improve DEI moving forward

EXAMPLE

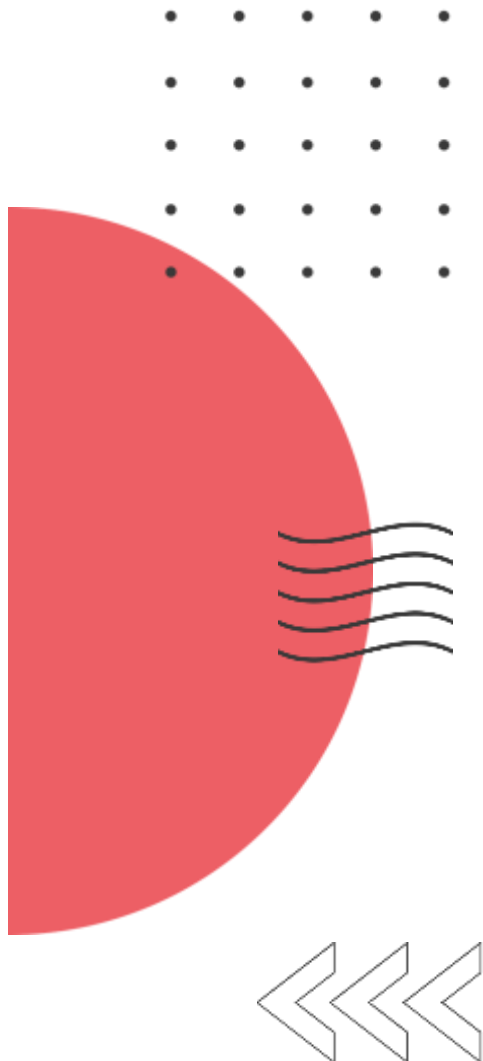
STEP 1: IDENTIFY PERSPECTIVE

Survey Design:

- **Expert Validation:** Enlist a panel of experts representing a wide range of backgrounds and identities
- **Cognitive Interview:** Invite individuals from diverse backgrounds to participate in the survey testing process and offer valuable feedback

Data Reporting:

- **Analyze and Report Disaggregated Data**
- **Cultivate a Culture of Data Transparency**

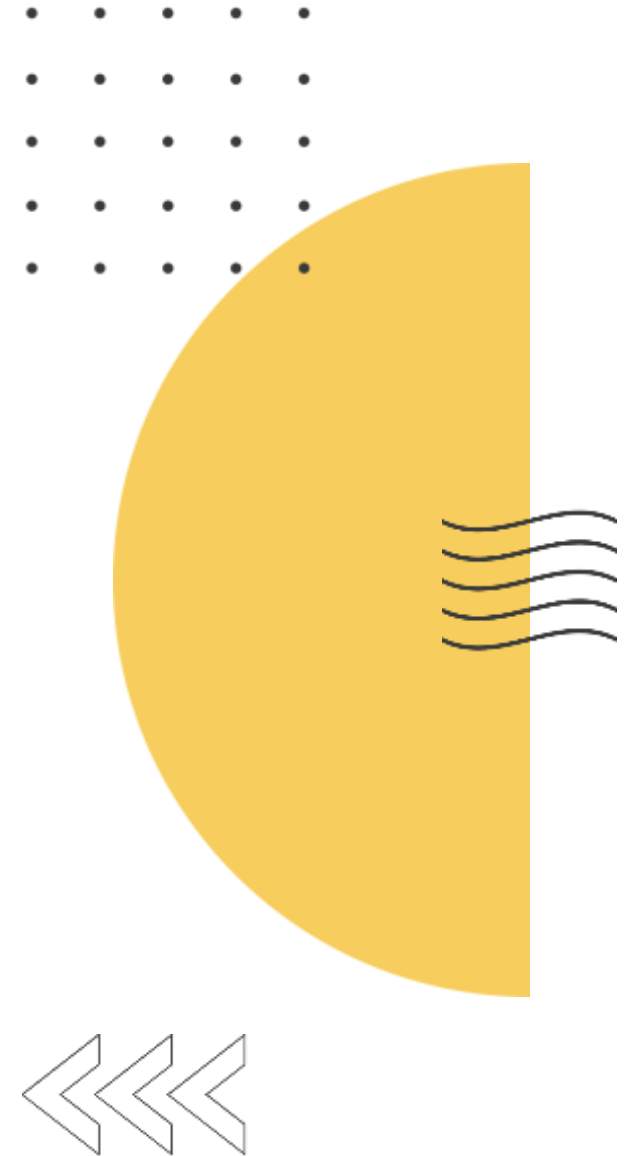


QUAL

POINT 1: IDENTIFY PERSPECTIVES

Study Design:

- Consider historical and current influences, gaps in awareness, and cultural knowledge when choosing methodology, platforms, and design study
- Invite stakeholders to outline the role of and the importance of inclusivity compliance in organizational culture
- Avoid potential bias when choosing methodology, designing the screener, invitation, and discussion guide



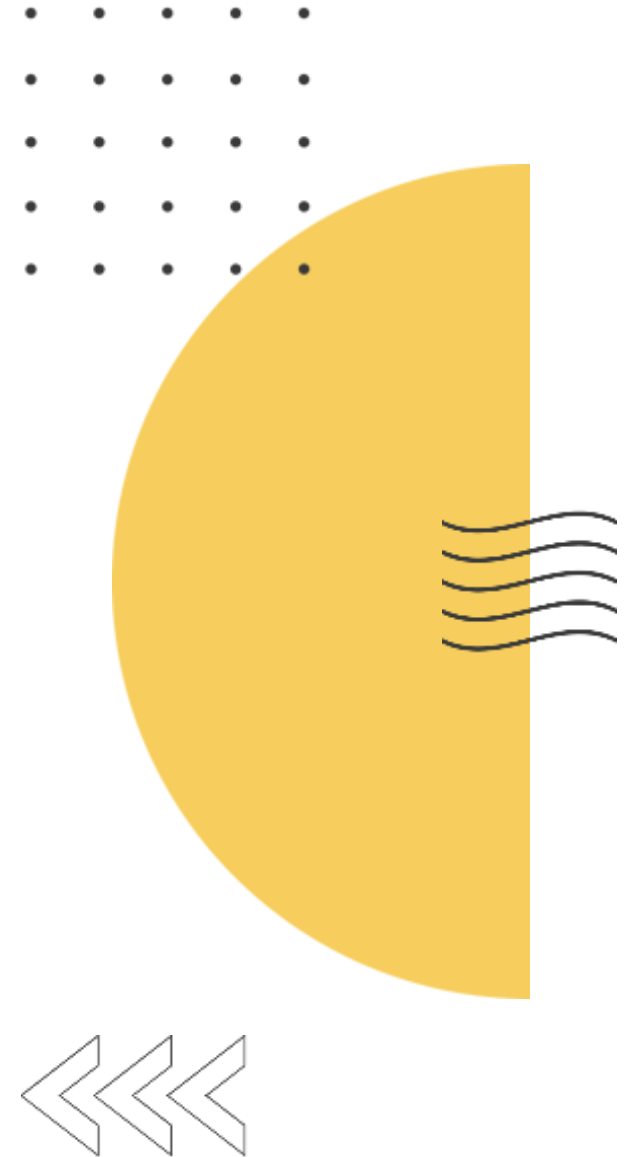
EXAMPLE

Internal Stakeholder Audit:

- Stakeholder inclusivity goals and limitations/barriers to achieving goals
- Determine action to be taken based on study results

Contextual Intelligence:

- Consideration of external research and internal insights team's level of awareness of current, historical, and cultural intelligence



POINT 2: D-DETERMINE POSITIONALITY

HOW WILL I BE PERCEIVED VS. HOW I PERCEIVE MYSELF WITH REGARD TO MY ROLE AND HOW I CONDUCT RESEARCH?

- Personal characteristics (e.g., attitude, body language, dress, mannerisms, lexicon)
- Understand participant's point of view and engagement criteria



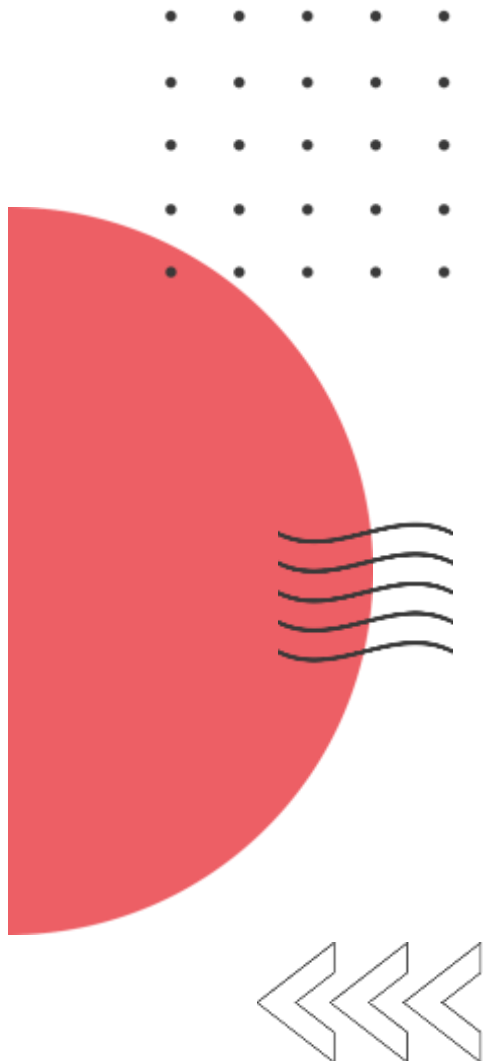
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STEP 2: DETERMINE POSITIONALITY

Be mindful of whose voice is represented...

Making research participants feel seen and valued:

- Define and target diverse groups
- Apply sampling strategies and diverse recruitment methods
- Ensure the underrepresented groups are adequately represented in the findings

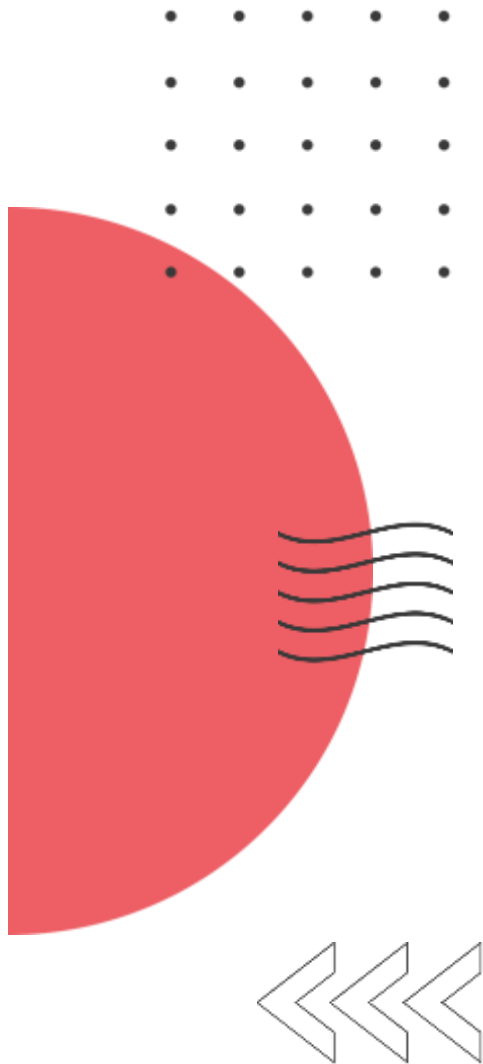


EXAMPLE

STEP 2: DETERMINE POSITIONALITY

Using inclusive language:

- Incorporate inclusive demographic items and options
- Use sensitive wording
“Other” vs. “An identity/group not listed”
- Provide "Prefer Not to Answer" Options



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POINT 2: DETERMINE POSITIONALITY

How do respondents perceive me,
as the moderator?



- Be mindful of verbal and non-verbal, as well as environmental cues

VS

How do I want to be perceived,
as a moderator or facilitator?



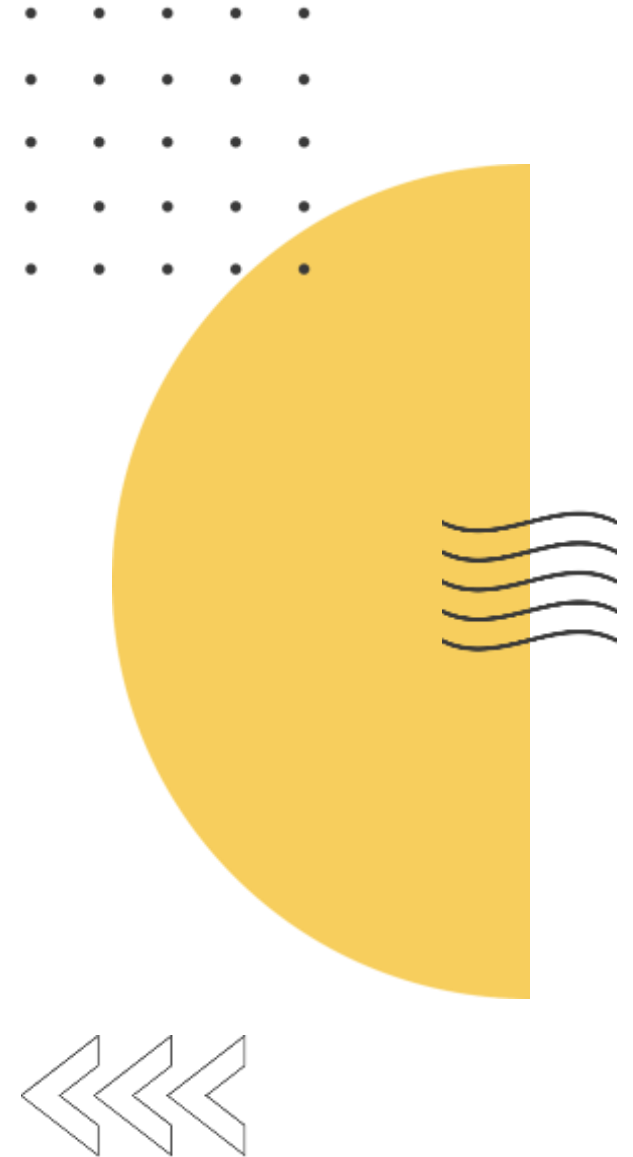
- Use verbals and non-verbals especially to convey awareness, sensitivity and authenticity



EXAMPLE

POINT 2: DETERMINE POSITIONALITY

- **Practice mindfulness:**
 - Be mindful of self. Conduct an audit of self, moderating style, and behavior to become more self-aware
 - Provide continuous visible and verbal validation. Use body language together with verbal
 - Accessibility for all is key
- **Model behavior:**
 - Strive for natural discussion
 - Set the tone. Model behavior you want to see



POINT 3: M-MASTER THE ART OF CREATING SPACE

EMPHASIZING PARTICIPANT CARE AND COMFORT

- Creating the Invitation
- Communicator and Communicatee
- Awareness and Application of Cultural and Lingual Context
- Accountability



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STEP 3: MASTERING THE ART OF CREATING SPACE

Common Issues Related to Inclusivity Compliance in Survey Research



**Social
desirability
bias**

**Ethical
considerations**

**Limited
accessibility**

EXAMPLE

STEP 3: MASTERING THE ART OF CREATING SPACE

Survey Consent

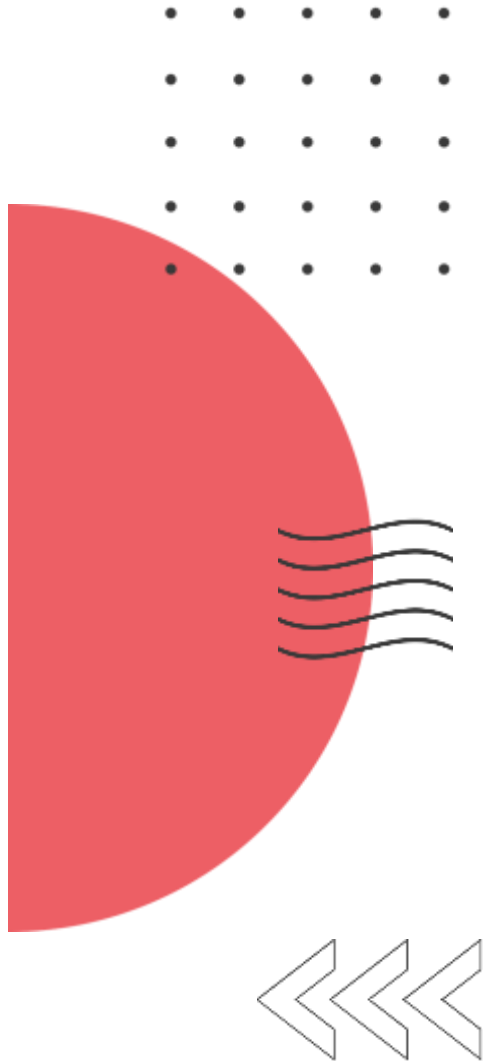
- Explain what's involved, including the risks and benefits of participation

Survey Anonymity and Confidentiality

- Detail data storage and protection measures
- Describe how the data will be reported

Survey Accessibility

- Multilingual surveys
- Mobile optimization
- Compatibility with screen readers



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STEP 3: MASTER THE ART OF CREATING SPACE



Create a welcoming and accessible space for all



Provide a clear, brief explanation of topic and discussion guidelines



Clarify roles



Acknowledge
Validate
Set expectations



EXAMPLE

STEP 3: MASTER THE ART OF CREATING SPACE

Ensure accessibility for all...

- Create a judgment-free zone
- Speak in welcoming tones
- Practice active and empathetic listening
- Use words, phrases, and lexicon that are easily understood and not perceived as condescending
- Avoid introducing bias



POINT 4: S-SUSTAIN ENGAGEMENT

ENSURING THAT THE RESEARCH “DINNER OR SNACK” IS APPETIZING, SATISFYING AND FULFILLING.

Providing motivation to sustain participation including providing progress acknowledgment, validation, and encouragement.

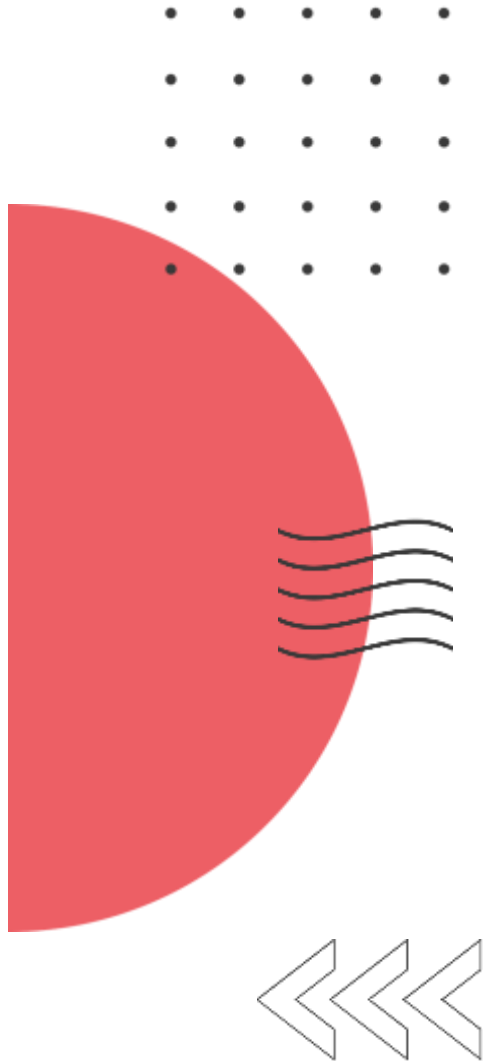


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STEP 4: MAINTAINING AND SUSTAINING ENGAGEMENT

Why should I take another survey?

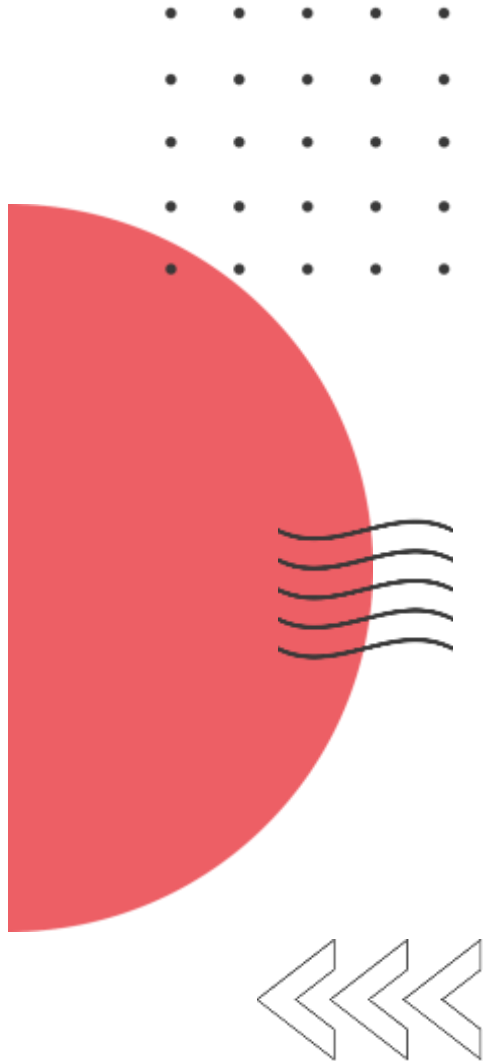
- Short attention span
- Survey fatigue
- Lack of trust



EXAMPLE

STEP 4: MAINTAINING AND SUSTAINING ENGAGEMENT

- Keep the survey concise
- Include progress and time Indicators
- Make the survey relevant
 - Show timeliness of the survey topic and why it is important to engage the conversation now in a survey invitation and survey promotional materials
 - Use comprehensible wording
- Demonstrate accountability and long-term commitment (e.g., survey invitation, messages from leaders, thank you email, ending screen)



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POINT 4: SUSTAIN ENGAGEMENT

Consider dynamics. Ensure comfort, and safety throughout the ebb and flow of the discussion.



Positive acknowledgment



Active Listening



Mirroring



Strategic silence



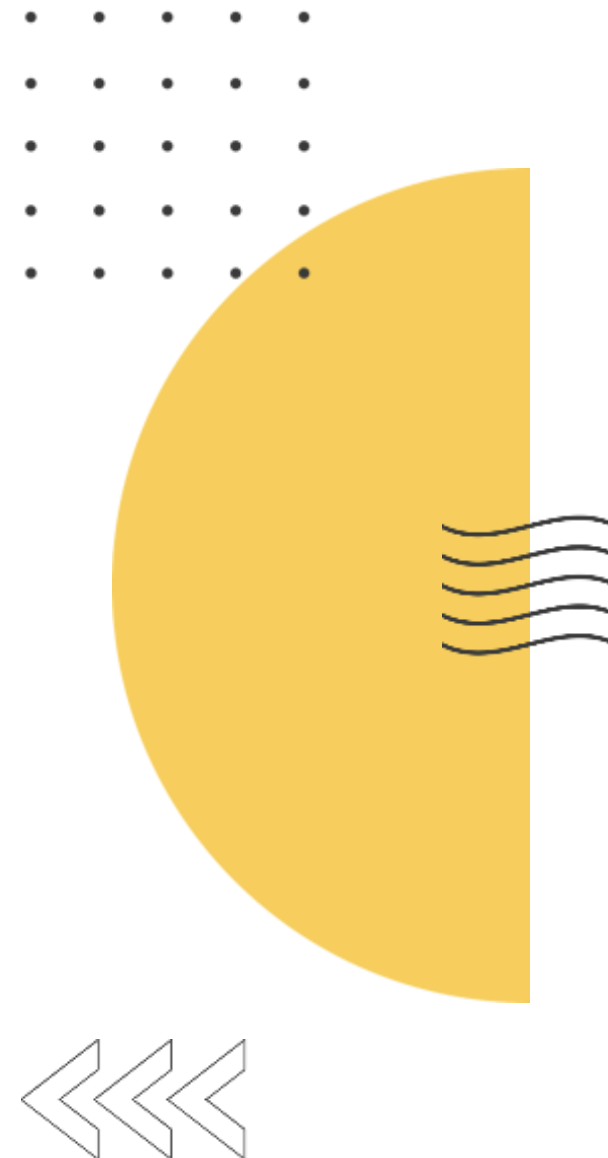
Summarize only what was said



EXAMPLE

POINT 4: SUSTAIN ENGAGEMENT

- Use :30 second rule to provide verbal acknowledgment and rewards—...
e.g. “Thank you for agreeing to speak with me” and “I am listening”
- Use open-ended questions and commands to encourage story-telling...
e.g. “Tell me more”
- Probe in an empathetic way...*e.g. “Help me understand ...”*
- Use:15 seconds of strategic silence to create space, and mine deeper thoughts
- Demonstrate mindfulness. Focus on truth. Avoid “agender-ing” and overstuffing the oreo—*cognitive overload and processing paralysis*



POINT 5: C-CLOSING THE CIRCLE

ACKNOWLEDGMENT AND APPRECIATION IS CRITICAL TO
MAINTAINING GOOD RELATIONS AND HAPPY
PARTICIPANTS



QUANT

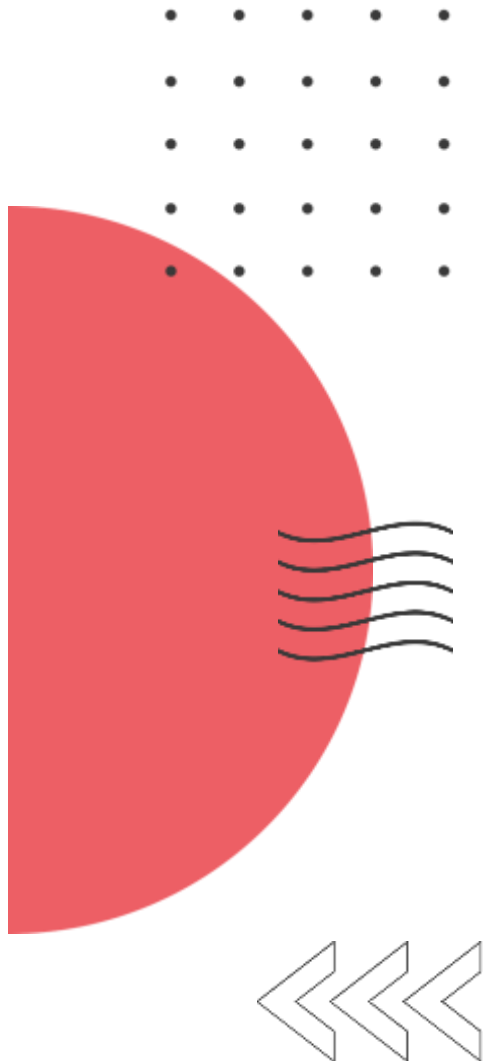
STEP 5: CLOSING THE CIRCLE

Show Accountability

- Provide a description of the plan outlining how the survey results will be utilized.
- Create a dedicated website for tracking progress and keep it updated.

Show We Care

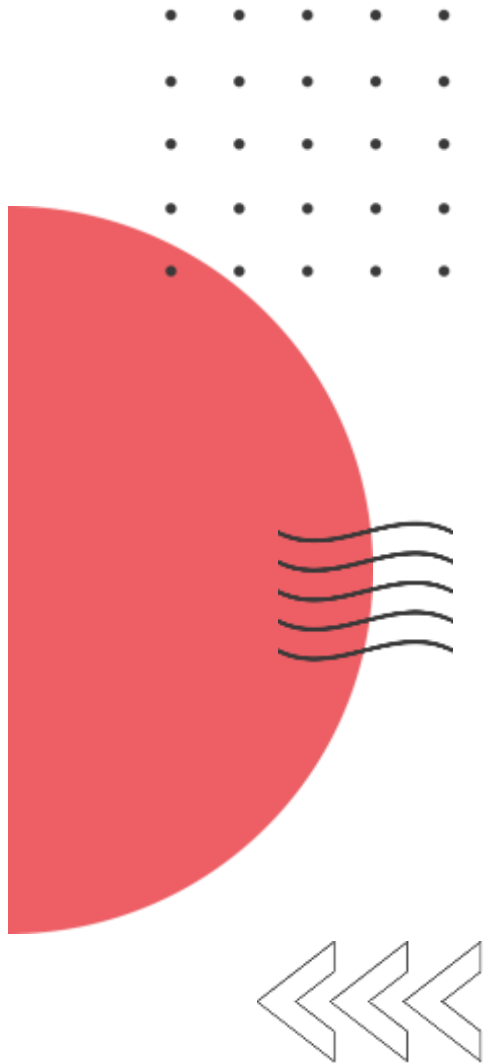
- Acknowledge the impact of systemic inequity on certain marginalized groups, centering their experiences over the dominant group.
- Indicate the resources, such as mental health services or support groups, that are available to your survey population.



EXAMPLE

STEP 5: CLOSING THE CIRCLE

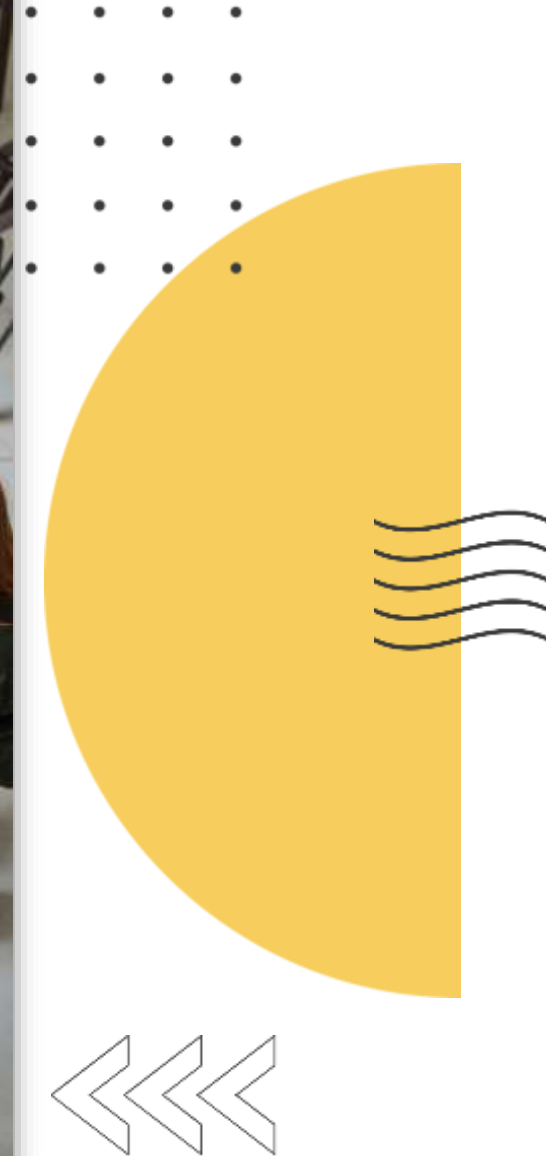
- **Create space for feedback**
 - Add an open-ended question
 - Provide a contact email to receive feedback
- **Address immediate next steps**
 - How the data will be used
 - Who is responsible to receive feedback and discuss results
- **Invite participant to receive the survey results**



QUAL

POINT 5: CLOSING THE CIRCLE

- Thank participants for their contribution
- Encourage continued participation
- Invite follow-up feedback and questions
- Provide relevant information, as needed
e.g., suicide help and hotline information for mental health study participants



EXAMPLE

POINT 5: CLOSING THE CIRCLE

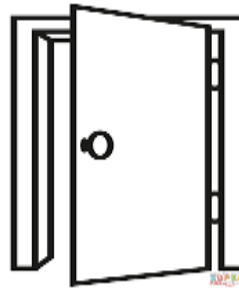
Empathize and Empower



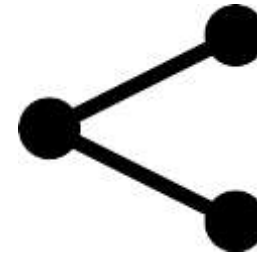
Validate and Thank



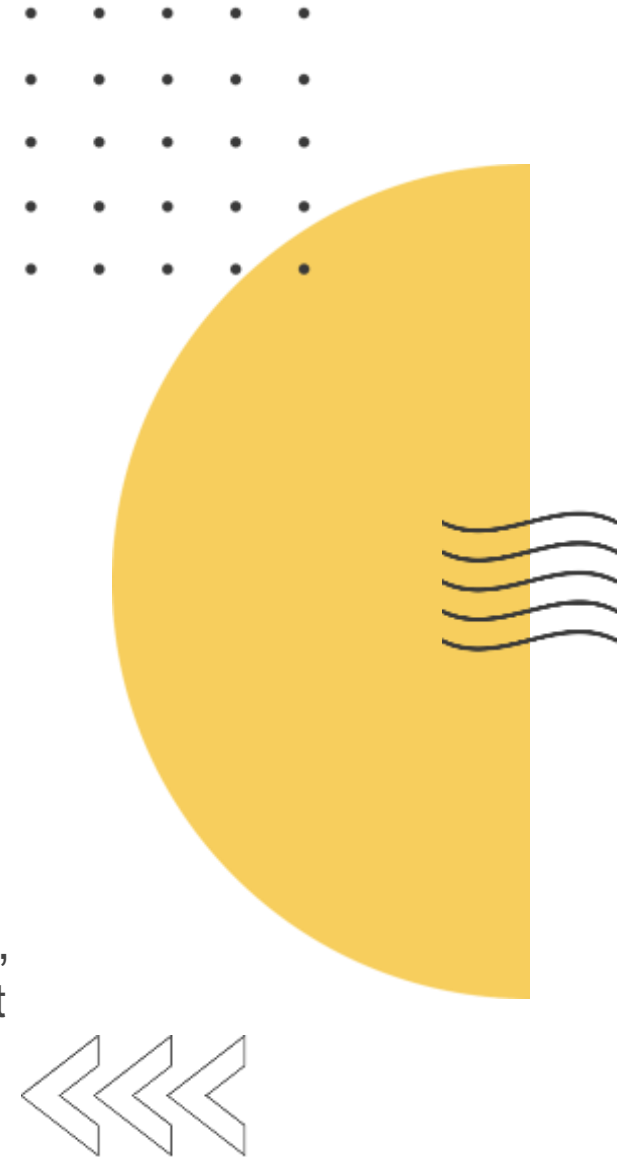
Encourage future participation



Open the door for questions and feedback



IF appropriate, share relevant information

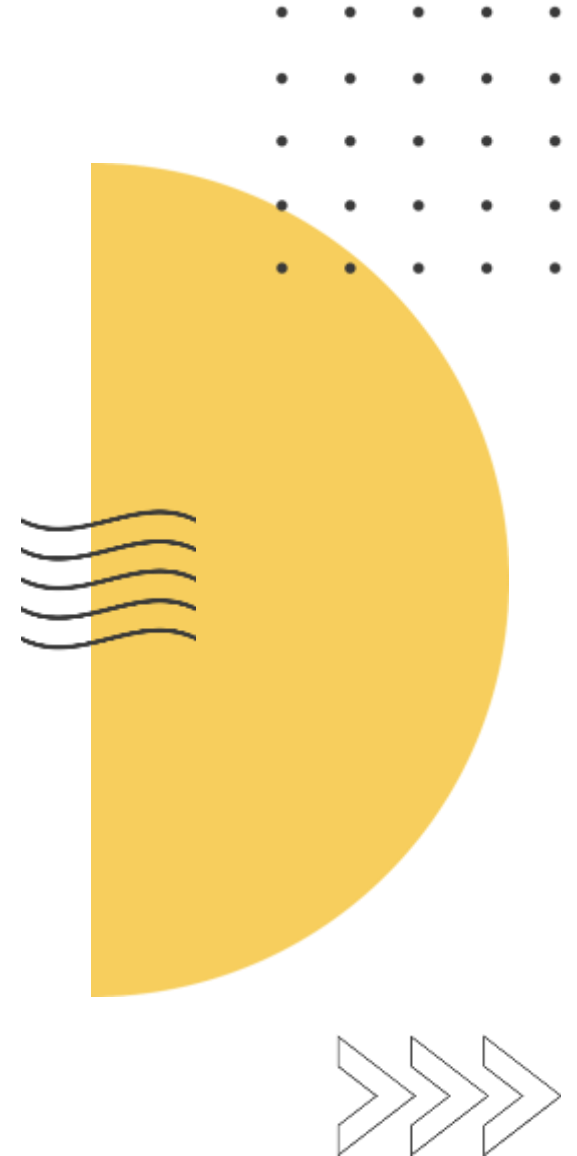


03

A.I. AND DEI: INCLUSIVITY COMPLIANCE

ESTABLISHING A SET OF INCLUSIVITY
PRINCIPLES IN ORDER TO GENERATE
ACCURATE OUTPUT

- Establish a Set of Clear Inclusivity Principles
- Build-in Cultural Awareness and Sensitivity
- Continuous Evaluation to Ensure Up-to-date Compliance



GARBAGE IN = GARBAGE OUT



A.I. AND THE FUTURE OF
INCLUSIVITY COMPLIANCE

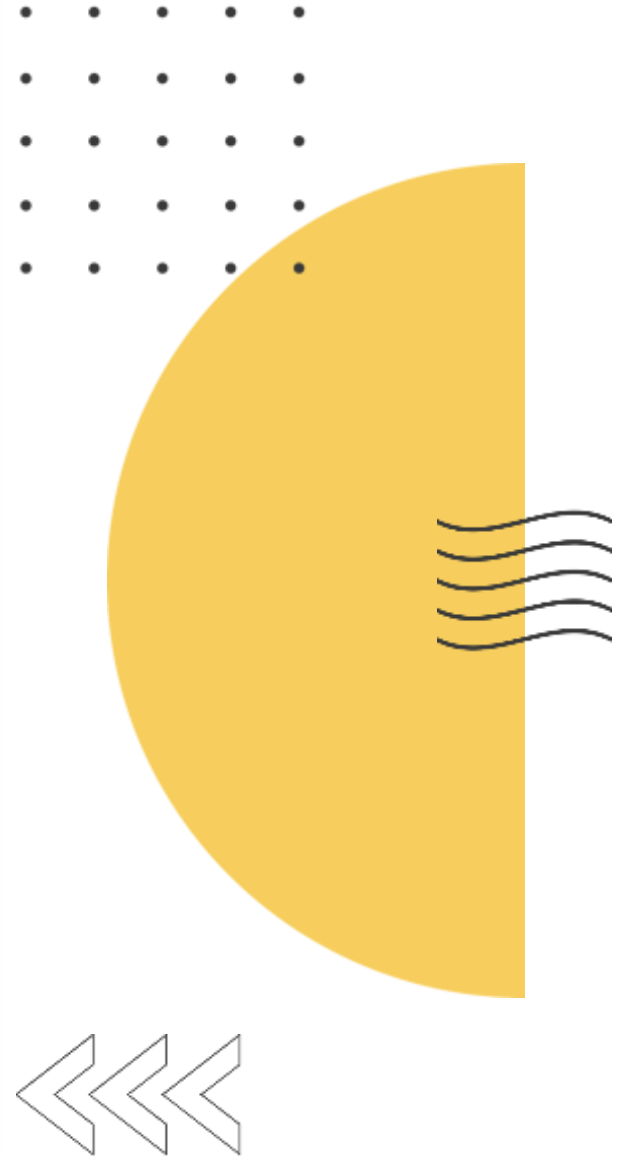
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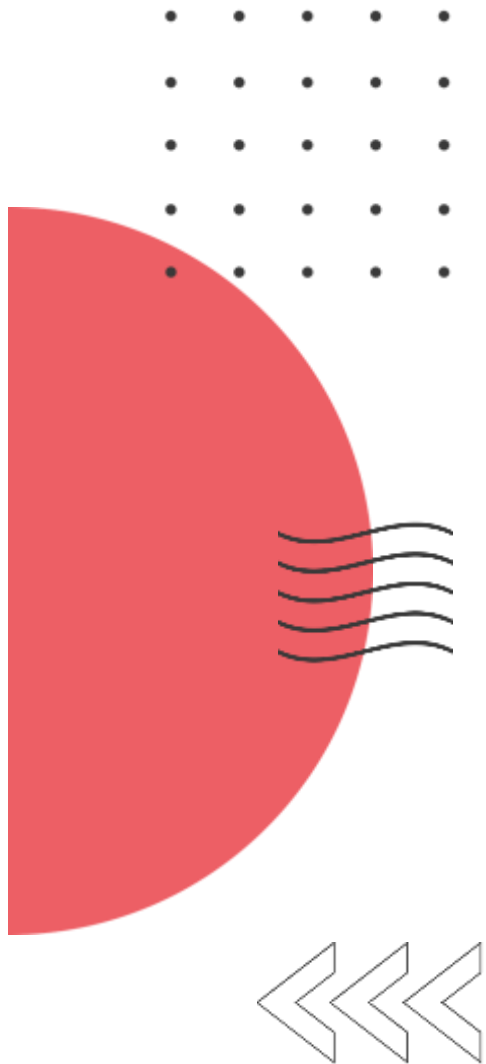


*Mind Readings: Build DEI into A.I. From The Start-
Christopher Penn—a visionary podcaster in new media*

QUAL

- Identify and Establish Principles of Inclusivity to elevate accuracy and engagement
- Inclusivity Compliance Action Plan can help eliminate bias
- Human oversight for cultural considerations
- The A.I. story is still being written...Be prepared to iterate and adapt





- Consider and verify diverse and inclusive data sources
- Assess whether the generated outputs exhibit any biased or discriminatory behavior towards specific groups
- Encourage interdisciplinary collaboration among researchers, data scientists, ethicists, social scientists, and domain experts

QUANT



04

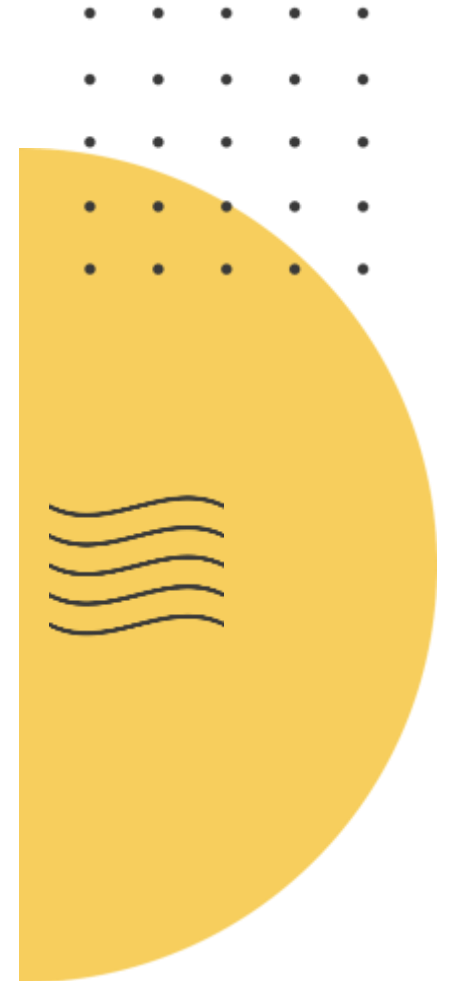
TIPS AND TAKEAWAYS...

QUALITATIVE:

- Elevate curiosity, sensitivity, and impartiality to increase accuracy
- Create accessible, safer spaces to elevate engagement
- Acknowledge and validate to maintain and sustain engagement
- Establish clear, unbiased principles together with a plan to ensure compliance

QUANTITATIVE:

- Promote diverse voices
- Establish a safe space for candid responses
- Utilize inclusive language
- Improve survey accessibility





**THANK
YOU.**

QUESTIONS?

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