Changing What Counts: The Value of Free-Text Diversity Monitoring

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**Classification**: Original research paper

**Abstract**

This paper argues that standard diversity monitoring (DM) methods are inappropriate for achieving the goals for which they are often used. The paper reviews current literature relating to diversity monitoring, establishing the urgency for finding alternatives to the tick-box methodology used by most organisations and communities. It describes the rationale for designing a primarily qualitative method for DM, inviting free-text responses to questions about individual identity, and the testing of that method in an empirical research study with two membership organisations. It goes on to summarise the relevant themes emergent across the resulting data which indicate the value of using this methodology.

Amongst these, the authors identify a number of benefits of free-text diversity monitoring under the headings of data validity, practical utility, and the engagement and experience of research participants. They use the research findings to argue that the free-text method can overcome the limitations of standard methods, while also providing diversity reporting which is of practical use and which establishes positive relationships with research participants. Acknowledging the need for further research to test the findings of this study in a range of organisational contexts, the paper nonetheless offers sufficient data to encourage organisations and communities to consider the greater use of free-text monitoring and to test the method in further research contexts.

**Key Words**

Diversity Monitoring; Diversity Management; Equality; Inclusion; Research Methods.

**Introduction**

Diversity monitoring (DM) is the process by which data about the identities of individuals is gathered, from which a range of activities can emerge. DM is used by most organisations to learn about clients, members, employees, applicants, volunteers, community or other types of stakeholders. It is widely promoted as a necessary exercise when organisations consider the development of their own practices as they relate to an equality, diversity and inclusion (EDI) agenda. And EDI agenda might include working to be more inclusive, encouraging diversity, encouraging equal access, seeking to benefit from the advantages of diversity, or combatting discrimination. However, the effectiveness of DM as a tool for any such purposes can be significantly hindered by the method used for gathering data.

The vast majority of DM follows the same standard practice, commonly advocated in organisational studies and rarely challenged: a simple, tick-box survey. The tick-box survey is designed to yield aggregate figures of individuals choosing from a list of group identities. However, research increasingly demonstrates that this method is flawed as a means for gathering valid information about human identity. Indeed, studies show that it can offer inaccurate or even damaging information of little use to an organisation or community wishing to pursue and EDI agenda by engaging with the issue of human diversity. More than this, the process of engaging in DM, when standard methods are used, can be harmful to the most marginalised in society. These people are often those which organisations and communities engaging in DM are seeking to identify and from whom they wish to learn in order to achieve and to demonstrate change, and in order to harness the benefits brought by diversity.

This article explores the value to organisations of making a significant shift in accepted practice around DM. It illustrates the risks and limitations of the standard model already demonstrated by research and asks whether a primarily qualitative method, which removes predetermined group categories from the process completely, can be a better approach for gathering data to achieve organisational EDI goals. Drawing on findings across two original research studies using a free-text DM survey, the article looks specifically at how this alternative method can impact on data quality and how it affects both the practical utility of DM data and the engagement and experiences of participants. In so doing, it explores how DM processes can be more fully inclusive and themselves act as a tool for nurturing diversity, while at the same time offering a practical solution for organisations engaging in DM for whom the standard model cannot provide appropriate data.

**Exploring Methods**

*The Relevance of Purpose*

The standard process for DM in the UK follows the model of the national census, supported by guidance from public bodies and advisory organisations (e.g. Haseldon and Joloza, 2009; Afkhami, 2012; ONS, 2015; Connelly *et al*., 2016; ACAS, 2018). Individuals are issued a series of questions relating to personal characteristics and asked to select an answer from a list of group identity options (e.g. male, British, married). Sometimes lists include an ‘other’ option, with the possibility of adding text, or a ‘prefer not to say’ option, commonly associated with the complex issues of ethnicity and sexuality. This method sits very much at the utility end of what has been called the “trade-off of validity and utility” (Aspinall, 2009: 1425), sacrificing detailed description of individuals (validity) for simple categorisation into groups which can easily be reported (utility).

The perceived value of critiquing this method will be determined by an organisation’s planned uses for the data gathered. Reasons for engaging in DM generally fall into two broad categories. The first is to illustrate, often externally, compliance and the success of EDI practices. Achieving this often requires the counting of individuals who associate with certain pre-established group identities. The tick-box method is largely appropriate for this purpose, since those identity descriptors are so commonly used for measuring organisational demographics. Interrogating the validity of particular group categories in data capture of this kind can be interesting, but the potential for impacting organisational practice is minimal.

This study is concerned instead with DM used to inform the second broad purpose of collecting demographic data, which is arguably the more strategically important for organisations and communities. That purpose is to inform the nature and development of diversity interventions which might be pursued either to create greater diversity within a particular context, to protect the needs and rights of those with minority identities, or to develop practices within such a context that will harness effectively the known practical benefits of a diverse membership or workforce.

We know that initiatives to nurture and develop diversity and to harness its benefits are not always successful. Indeed, research shows that they can be expensive and ineffective (see Kirkman et al, 2004; Joshi and Roh, 2007; Hamdani and Buckley, 2011; Herring, 2009: 208-9; Kochan et al, 2003: 5-6; Theodorakopoulos and Budhwar, 2015). In order to avoid such failures, rather than simply adopting generic diversity strategies, policies and practices, organisations looking to harness the positive benefits of diversity must develop their own bespoke practices and policies which are based on as much specific detail as possible about the people concerned. This principle has been demonstrated in a range of research contexts (see Aspinall and Anionwu, 2002; Jayne and Dipboye, 2004; Kochan *et al*., 2003; Walby and Armstrong, 2010; Köllen, 2013; Parameshwaran and Engzell, 2015). Significantly, such studies sit alongside research which has shown that this work relies also on high participation amongst all stakeholders within an organisation or community, and especially those individuals whose identities might traditionally be overlooked (Clarke *et al*., 2006; Bell *et al*., 2011; Knudsen *et al*., 2011). This includes the most marginalised individuals within any given context, whose personal identities often do not match onto group categories provided as options on standard DM forms.

When aiming to develop or to harness the benefits of diversity, the need for detailed accuracy when collecting demographic data about any group of people is clear. Identifying an effective DM methodology which offers that detailed accuracy – a high level of data validity – is therefore of significant importance for anyone engaging in this work. However, validity cannot come at the significant sacrifice of utility. There will be no benefit to creating a method for collecting data which offers detailed information in a form which cannot be used in practice. Testing a new methodology for DM against these dual priorities – achieving sufficient validity alongside sustaining a practical utility – is the focus of this study.

*Standard Practice: Problems of Accuracy*

The sacrifice of validity in the standard method is inherent to its design. Categorising individuals into predetermined group categories simplifies or fails to recognise the complexity that exists across societies (Bonnett, 2018; Prewitt, 2005; Brubaker, 2004). By their nature, tick-box forms omit certain identities, leading to the absence of whole strands of human identity from the resulting data (Walby and Armstrong, 2010) as individuals cannot (or refuse to) choose identity options offered to them (Aspinall and Song, 2013: 70-77). The increasing complexity of recognised identities is one cause of such omissions. Research shows, for example, that only a minority of respondents will describe their ethnicity using single, standard categories offered in tick-box forms (Pringle and Rothera, 1996; Lopez, 2003; Aspinall, 2008). However, surveys which try to include everyone by using the broadest identity groups are also problematic, producing data too general to be useful (Bhopal, 2002; Todd, 2005; Bonnett and Carrington, 2000; Woodhams and Danieli, 2000; Aspinall, 2011a and 2011b; Aspinall and Mitton, 2008).

Predetermining group identity categories ignores the reality of personal identity as fluid and changing (Burton *et al*., 2010; Waters, 2000; Hitlin *et al*., 2006; Aspinall, 2012; Connelly *et al*., 2016). As a result, historic data gathered using the standard method can require redaction in order to recognise new emergent identities, dismiss outdated language, and to seek comparisons across cultural boundaries (Morning, 2008; Mateos, Singleton and Longley, 2009; Aspinall, 2011a; Connelly *et al*., 2016). In the 1991, 2001 and 2011 UK censuses, for example, ethnicity categories changed, causing the ONS to acknowledge the limited value of the data and the need to alter historic records (ONS, 2012).

*Standard Practice: Participant Experience and Engagement*

DM Forms which require individuals to choose from predetermined categories can impact negatively on those individuals. The homogenisation of diverse people into larger categories can be experienced as discrimination (Aspinall, 2000; Aspinall, 2011b; Köllen, 2013), encourage inaccurate constructs (Aspinall, 2010; Werbner, 1990; Goldberg, 1997: 27-58; Hacking, 1986), and inspire judgements about the relative value of groups (Aspinall and Mitton, 2008; Gómez, 2012; Jenkins, 2004; Greene and Kirton, 2009; Walby and Armstrong, 2010). These assumptions can lead to damaging patterns of bias in organisational contexts (Jenkins, 1994; Pettigrew and Tropp, 2011: 131-43; Kirton and Greene, 2016: 57-84).

These issues of inaccuracy and prejudice relate to long-held discussions in the study of inter-group social dynamics (Young, 1990; Brewer, 2003; Jenkins, 2004; Brown, 2010; Pettigrew and Tropp, 2011), in which imposed group categorisation is known to limit opportunity and to encourage hierarchical social binaries, stereotyping and prejudice. The imposition of group categories has been shown to cause misinformation and bias in critical arenas like healthcare (Gómez and López, 2013), the performance of negative attributes based on societal expectations of particular groups (Hacking, 1995; Brubaker *et al*., 2004; Jenkins, 2004; Martin and Gerber, 2006; Aspinall and Mitton, 2008; Burton *et al.*, 2010), and even ethnic and nationalist violence (Brubaker, 2004).

With this background, the use of predetermined group identities in DM can lead to a sense of exclusion, reduced self-esteem, and a lack of motivation to participate (Bonnett and Carrington, 2000; Townsend *et al*., 2009; Aspinall, 2012). The significance of this for any diversity and inclusion initiative, in any context, is clear. In a standard DM exercise, those individuals most likely to be looked over when communities, organisations and wider society makes decisions are also those least likely to be counted, or to feel able or willing to participate. This means that the work done on the basis of that DM research – work which will inevitably shape ideas about how to become more inclusive and to nurture diversity – will *a priori* exclude those marginalised people, undermining the very purpose of that work. From the perspective of an organisation wishing to make the most their diversity through shaping effective Diversity Management programmes, the impact is equally problematic. Those programmes rely for their success on detailed knowledge of and high levels of participation amongst stakeholders, and research methods which exclude individuals from the outset cannot be considered valuable tools.

**Designing an Alternative Model**

Most responses to the problems of data accuracy and participant experience in DM continue to pursue predetermined group categorisation. Variations on the standard method include providing larger numbers of groups; allowing people to pick several groups for each identity strand; providing the option to indicate dominant and secondary identities; and analysing identities by comparing data across more than one diversity strand. These create possibilities for triangulation and multi-layered data capture (e.g. Stephan and Stephan, 2000; Burton *et al.*, 2010; Nandi and Platt, 2012; Song and Aspinall, 2012; Aspinall and Song, 2013; Parameshwaran and Engzell, 2015; Connelly *et al*., 2016) and have been used in some census surveys (Aspinall, 2003; Aspinall, 2009: 1428-32; Aspinall, 2012: 355).

Greater triangulation allows a richer data set to be gathered, but it does not address the more fundamental problems of exclusion and inaccuracy surrounding the use of predetermined group categorisation. Such methods cannot be seen as a solution for organisations wishing to use DM to gain information about the diversity of their stakeholders which possesses significantly greater validity. Achieving that goal requires a more fundamental change.

Ongoing discourses about the relative merits of qualitative and quantitative research indicate that this change should draw on predominantly qualitative methods. Qualitative research is frequently presented as more focused on the lived experience of research subjects than the quantitative, which inclines towards presumed ideas and the imposition of conceptual frameworks; it is shown to be better placed than quantitative research for seeing life through the eyes of participants, not the lens of the researching body, better designed to learn about people less known and represented in society, and better placed to draw out the experiences of the underprivileged (e.g. Blumer, 1954; Becker, 1967; Hammersley, 1992: 159-173; Vidich and Lyman, 2000). Noting also that quantitative research has been opposed by equality movements as exclusivist and anti-inclusion (e.g. Miles, 1993; Maynard, 1998), the potential for qualitative approaches to offer a more valid form of data about human identity through DM appears high.

The decision to trial free-text survey forms specifically in this study was informed by the desire to test a model that promotes data validity, while also prioritising practical utility. Free-text forms offer the opportunity to ask open questions and for participants to use their own language in answers of any length. They also allow a structure for asking questions which is similar to standard DM forms and which the researchers could therefore design to appear familiar to participants. Free-text forms also offer a model which is no more burdensome in its design and issuing process than a standard DM survey. A model was therefore developed which asked individuals to provide data separately across different diversity strands, in the same way as standard forms, but which invited descriptive answers to be written into a free-text box rather than asking participants to select from predetermined group categories.

# Research Study: Testing Free-Text Monitoring

*Gathering Data*

Surveys were issued to the membership of the National College of Mediators (NCM) in 2015 and the Diaconal Order of the Methodist Church in Britain (MDO) in 2017, both using an online survey tool and, for those who preferred it, as a paper survey. Access to members was provided through their central offices, following meetings with key individuals to discuss the study and explore its potential outcomes. Surveys were issued by those offices, with an introduction to participants from their senior leadership. Participants were assured of ethical standards and anonymity.

These organisations were chosen because they were sufficiently similar for analysis to be done across both without the need to adapt data sets for significantly different contextual situations. Both are membership organisations, of a similar size, with the same geographic spread. Both also had a similar relationship with DM, having performed it previously but not having made use of the data.

The surveys solicited free-text responses against nine diversity strands, mapped against protected characteristics in the UK Equality Act 2010. In each case, participants received the instruction to answer every question “using your own words” and using as many words as they wished, without the provision of category options or prompts to use a certain kind of language: “Please describe your ethnic identity”; “Please describe your gender identity”, etc. Only one variation to this was used. Alongside asking participants to describe their disability status, participants were asked separately to state (as a simple yes/no) whether they had sought formal recognition of a disability. The value of gathering this data alongside the qualitative responses for this identity strand had been demonstrated during pilot exercises and is explored below.

In order to gather as much relevant data as possible, two further questions were added:

* “Are there other aspects of your identity about which you would like us to know?” – added to offer participants space to describe important identity markers outside of the legally protected characteristics;
* “From your perspective as a respondent, what do you think of this style of diversity monitoring?” – added to learn participant views on the free-text model.

The timeframe for accepting responses to the survey was dictated by both the desire to elicit the greatest number of responses and also organisational needs. In total, 220 participants completed the survey: 99 from the NCM (43% response rate) and 121 from the MDO (34% response rate). Across all 220 responses, 29 were returned in hard copy.

*Analysing Data*

Both qualitative and quantitative methods were chosen for analyzing the data, the benefits of mixed approaches being increasingly recognized within social research (see Bryman, 2006; Creswell and Plano Clark, 2011). Methods were chosen to respond appropriately to the nature and amount of data provided in response to the various questions. However, making what Morgan (1998) calls a priority decision in favour of qualitative approaches (with some exceptions detailed below) quantitative methods were applied primarily for what Hannah and Lautsch (2011) label supplementary and credentialing purposes of qualitative analysis.

Some identity stands (age, gender, nationality) gathered answers largely in the form of a single number or phrase, with limited variations. In these cases, simple quantitative aggregations allowed for statistical reporting in the form of charts and graphs to demonstrate demographic representation. For identities described by participants predominantly in single words or phrases, but where the language variety was too great to produce simple aggregations (e.g. ethnicity, sexuality), a word cloud tool was applied. Word clouds have gained recognition as a helpful tool for identifying and communicating patterns in large data sets (e.g. Cidell, 2012; Schwartz and Ungar, 2015). Importantly for this study, they allow dominant phrases and words to emerge while also demonstrating the breadth and diversity of responses.

For diversity strands where lengthier descriptions were consistently provided, a period of reading and initial reflection on the data was followed by lexical searches and the grouping together of closely-related answers through a data-driven coding process. This allowed for some further quantitative analysis. In some areas (e.g. relationship status) collective group identities (e.g. married, in a partnership, single) emerged from the coding, which were quantified and presented using simple statistical visualizations. However, these group identities were also interrogated further. Coding of the extended text from answers which associated with each emerging group identified also detailed information about the nuances and variations amongst answers. Variations (shared sub-groups, unique language, complex designations) were coded and, where possible, quantified by category type using content analysis. Such findings were illustrated in reports using complementary statistical visualizations and illustrative quotations.

Across the study, responses which did not fit into this framework were interrogated first using content analysis to identify within each diversity strand three types of information: identity definitions demonstrating complexity beyond the language used in standard tick-box forms; identity definitions which included information not usually associated with the category in question; and multi-faceted approaches to human identity. Following this categorization, data from each category were subjected to a thematic analysis using a data-driven coding process. The relative significance of themes was then examined by mapping their prevalence across the two studies.

Within the disability strand, the addition of the yes/no question allowed for the triangulation of statistical and qualitative data. Concurrent triangulation and corroborative counting (see Creswell and Plano Clark, 2011; Hannah and Lautsch, 2011; Wiggins, 2011) were applied, in order to scrutinize both data sets.

These mixed analytical methods enabled presentations to the annual national gatherings of each organisation using simple visual charts; word clouds; descriptions of emergent themes and more complex and interpretivist approaches to identity, using extended quotations; and quantitative indications of the prevalence of these themes and approaches. Following these presentations, members were invited to discussion groups in the days immediately following the presentations in order to discuss the data and to offer feedback on the method in more detail. Final reports were then written and presented to the central offices of both organisations.

**Findings**

The purpose of this article is not to present the two diversity reports or the analysis which led to each (for that information, see Authors, 2016; Authors, 2018), but instead to reflect on the how the data collected across both cohorts and the formation of both reports allows us to understand the value of free-text surveys as an effective DM tool. It seeks to examine whether free-text DM can overcome the problems associated with the standard method, while also generating reports useful enough to influence organisational practice. It therefore focuses below on three areas of interest:

* The *quality* of the data collected.
* The *utility* of the data for organisational use.
* The impact on *participant engagement and experiences*.

*Quality*

For several diversity strands, the quantification of individual words, phrases and numbers and across both cohorts allowed reporting which made use of shared group identities, affirming group categorisation in principle as a helpful tool for understanding diversity. Reports stated, for example, that over 50% of NCM members identify as Christian, 85% as female, and that 90% of Methodist Deacons reported opposite-sex attraction. This allowed for reporting of a similar nature to standard DM analysis produced using tick-box methods. However, the process for discerning these group identities facilitated by the free-text surveys lends them a different quality. Only where individuals had themselves chosen to identify with a group or to describe themselves using a particular group name did reports use these as markers of identity, grounding them in the experiences, understandings and language of research participants. The additional validity of analysis which emerges in this manner underpins data-driven approaches in social research and is a foundational principle for variations on core qualitative research methods like grounded theory and thematic analysis (on which see especially Bryman, 2016; Jason and Glenwick, 2016).

In addition, the free-text method allowed for the diversity of language to describe certain group identities to be drawn out (for example “heterosexual”, “straight”, “attracted to the opposite sex”). It also enabled groups which do not appear in standard forms to emerge as identity markers important to participants across both cohorts, including identities shaped by particular responsibilities (7% of all respondents were carers), and by particular skills (9% were bi/multilingual). The value of capturing these additional groups was emphasised by one participant: “Naturally bi-lingual…This is all very important to me and I find that language is so often left off ethnicity monitoring”.

However, the qualitative data gathered in the surveys offered much more than a different means to discern group identities. The free-text format yielded nuanced information beyond the detail possible from a tick-box form. For example, when asked about ethnicity, although 94% of all respondents identified as a form of British/Irish and Caucasian, 13% did not provide either a standard word or just one category to describe their ethnicity. In every identity stream, answers provided detail, clarification, explanation and description beyond group category names. Across the cohorts, the mean number of words per answer was 2.2 when describing ethnicity, which compares similarly to nationality (1.61) and sexuality (2.09), but which sits well below disability (6.27) and religious identity (7.54). Nuanced information was also present in diversity strands where such information might be unexpected. For example, 8% of participants described their age using a phrase or description rather than, or in addition to, a simple number.

Several important themes emerged across the cohorts when participants offered extended answers. These included the desire to describe the quality of personal relationships. 16% of respondents across the studies offered indications of this kind, including both positive (“good”, “supportive”, “committed”) and negative (“complicated”, “difficult”) descriptors. Another was the inclination to illustrate practical, lived realities beyond the basic implications of possessing a particular group identity. Statements such as, “I am a widow with a supportive family and many friends” and “My children have long since left home… My wife and I are currently living and working in different districts” illustrate the desire amongst respondents to qualify identity descriptions with information about practical details unique to their lives. Such answers repeatedly emphasise the limitations of group categories like “widowed” or “married” as identity descriptors when such different lived experiences can be labelled in the same way. Similarly, we might contrast the response “living alone” with “single parent/adopted son”. Both individuals would be included in the category “single” in a standard DM form, but in practice the practical realities of inhabiting that group identity are markedly different.

The number of participants who described experiences of living with a disability (26% across the two cohorts) surpassed significantly the number of people who had sought formal recognition of a disability (6%). Conditions outside of the boundaries of qualification for official recognition in some contexts (“reduced energy levels”, “depression”, “Able-bodied, with some chronic pain”) or ones for which individuals had not sought official recognition (“long term back injury”, “mobility problems”) were described. The gap between the responses for these associated questions demonstrates the problems with categorising individuals into two groups – disabled people and those who are not disabled. It also shows that individuals’ disabilities in practice do not map neatly onto statistics recorded through official registers or verification schemes. Organisations relying on conventional monitoring forms, which ordinarily ask simply whether someone has a disability, risk only partial knowledge about the extent of their membership’s physical and mental diversity.

Identities of change were also emphasised in a significant body of answers. Indeed, transition was described across data relating to relationship status, gender, sexuality, family, religion, age and nationality. The challenge this poses to standard monitoring, where transition is not captured, is particularly pronounced. We can, for example, see immediate differences between the respondent who described themselves as “prospective adopter” and another who stated, “No children (due to his medication for Leukaemia)”. In a traditional DM process, both would be treated as having the same identity with regard to children, but free-text DM allowed the transitional identity of the former to be acknowledged and the important distinctions between the identities of these participants to be understood. 23% of respondents across the two groups also described details of their past identities: where they grew up, countries in which they had previously lived, past careers, and changes to their religion. The fact these still held significance for such a large number of participants illustrates the importance of the past as an aspect of present-day identity for many individuals.

28% of all respondents offered personal information outside of standard diversity streams. Amongst that group, individuals chose in particular to describe important non-family relationships (16%), personality traits (11%), educational and working backgrounds (10%), political views (8%), and hobbies (8%). This sat amongst information on special skills, the identities of family members, personal commitments, and physical attributes. These markers of identity would not have been gathered in a standard form, but the free-text method allowed individuals to express aspects of themselves which they believed to be important for any analysis of their identity, and in turn allowed a richness of data to be fed into the organisational diversity reports.

*Utility*

In order to establish the value of the data sets produced by free-text DM, their suitability for producing reports and analysis of practical use to organisations must also be considered. Extracts and information from the individual diversity reports produced for each organisation have been published (see Authors, 2016; Authors, 2018), and these establish in basic terms the capacity for free-text DM to produce diversity reports for practical use in organisations. However, for the purposes of this study we must ask whether a free-text survey can lead to diversity reporting which achieves more than a standard method could offer. It is important to illustrate examples of how the diversity reports produced for the NCM and MDO have so far contributed to each organisation’s diversity agenda in ways which would not have been possible had the data been gathered using a standard tick-box exercise.

Since its report was produced, the NCM has sought to embed new approaches to diversity in policy and practice at a national level using data gathered in the free-text forms. In 2016 it established a new working group to examine the findings as a starting point for developing a national EDI policy and considering how the NCM could introduce practical measures in its recruitment and training to make the profession more accessible and to attract a more diverse membership.

The particular utility of free-text surveying is illustrated by this significant organisational response having been informed by data which would not have been gathered by a standard DM form. The NCM survey elicited the word “normal” in answers to questions in two sensitive areas – sexual orientation and family arrangements – as well as in more general personal descriptions. The use of this word (which also appeared in MDO responses) demonstrates self-definition in contrast to alternative identities of a kind which implies those alternatives are believed to be abnormal. The use of this language can imply a judgement – the belief that other people are in some way of lesser value. It would be impossible to glean social attitudes of this kind from tick-box DM, but the free-text model enabled the NCM quickly to identify a potential risk: if some members self-identify as ‘normal’, this could influence or inhibit their working capabilities. In response to this finding, as part of its EDI programme, the NCM is delivering a comprehensive training programme around diverse identities and living situations, particularly for mediators engaged in family practice.

In the context of the MDO, a helpful example of free-text DM influencing organisational practice surrounds the word “transgendered”. Objections to this term appeared in the diversity forms and were raised again by members in the context of the report presentation. During that presentation, views on this word were discussed and the decision was made by the national gathering of the MDO specifically to avoid that term in order to show support for those affected negatively by its associations. Raising objections to the use of particular language is not possible in a DM form where individuals are asked to choose from predetermined categories, but the forms used in this study made this possible. This is an interesting example of how a free-text DM exercise informed discussion and effected change in linguistic practice, in an immediate way.

A direct line between this DM exercise and formal decisions about national policy and practice in the MDO cannot be drawn at this stage, but the report has achieved some influence. Information from it has been used by the MDO in its own annual reporting and governance meetings, as well as to inform discussions around gender and sexuality in the wider Methodist Church. The MDO, recognising the effectiveness of the method and the positive effect of using a fully inclusive methodology for DM now makes use of free-text DM as part of the application process for in-coming members of the Order. The utility of the method and its practical benefits continue to be affirmed as it is also rolled out for other recruitment processes relating to ministry in the wider Methodist Church.

*Participant Engagement and Experiences*

Across the cohorts, 33% of respondents offered personal views on the experience of completing a free-text DM form. Of these, 93% expressed positive opinions. A number of those responses made a simple declaration – “Excellent”, “comprehensive and accessible”, “important” – but many offered more detail, including in explicit contrast to the standard model: “better than just box ticking”; “I think it is refreshing not to be limited to ticking a box”.

A theme which emerged from such responses was the benefit of “space” provided by the free-text survey: “Good to have space for open answers rather than tick boxes”; “very fresh, and open rather than closed”. This positive openness was perceived specifically in the ability of participants to use their own words – “It gives more opportunity to give the full picture” – and the avoidance of pressure to use given language: “More restrictive questioning styles can often feel as though you are being pushed into giving the response the questioner is looking for”; “The questions feel more open to allow the respondent to use their own language to describe their own identity”; “It gives people the opportunity to respond in their own way, without forcing them to choose from a range of options”. The removal of predetermined language was also seen as improving the validity of the data: “Because of its open question approach, I think you will get a more accurate gathering of information”; “There’s more of you on the page when you’ve filled it in”.

Another emergent theme was that free-text offered greater opportunities of expression amongst marginalised people. In some cases, this contrasted with personal experience of frustration with the traditional method: “I think it is useful, as a person who doesn't quite 'fit' tick boxes, this gives an opportunity to explain why”. This benefit was specifically contrasted with the need on standard forms to label people as ‘other’: “I prefer this to the multiple choice questions, which not only tell me how I should label myself, but also, when I have to select 'other', suggests that I don't really fit in the wanted or expected categories. This system allows me to define myself on my own terms and in so doing doesn't make diversity an issue”.

The valuing of marginalised individuals was associated with improved organisational self-awareness and the potential for practical change: “Perhaps it might raise awareness of the broad spectrum and diversity of being human, there are not clear dividing lines between different areas of ethnicity, sexuality etc”; “I think it gives the possibility of including nuanced subcategories and indicating people's attachment to groupings not previously considered, which may be significant for inclusion, and for consideration in planning”. A positive outcome of this would be a more fully inclusive community: “One benefit is to make sure that you're reaching the different groups in the community that you are aiming at reaching, so that it is – whatever you're doing, is inclusive of all, and you monitor that by doing this sort of thing”.

In some cases, this potential for learning was seen as an opportunity for influencing wider opinion about minority groups: “So words that we don't often use to describe ourselves, or think are important, might in fact turn out to be very common or very important, because you haven't thought about the categories that are going to turn up. So it might be quite fresh”. There was hope in some responses that free-text monitoring could therefore lead to radical change: “I am…hoping it will 'live' in a way of informing and transforming the church”. This was specifically seen in contrast to the traditional method: “I cannot see how "ticking boxes" is going to change attitudes”.

The free-text form offered some participants the first opportunity for real self-reflection about identity – “In some ways it’s a lot more personal I think”; “It's interesting and has certainly made me think about myself and others” – and even led to moments of self-discovery: “I was surprised that my national identity is English, not British. But I was pleased to be able to discover that, and put down what I think I am”. For others, it offered a chance to reflect on the limitations imposed on their own self-understanding by the tick-box method: “I realised I am conditioned to think in categories previously used”.

For some individuals, however, having to make personal decisions about language led to negative reflections on the method: resistance to thinking about how to describe oneself (“I prefer tick-box style as I had to think in a couple of places what sort of answer was being sought”); anxiety about the acceptability of language (“What’s the correct way to phrase it?... do I say, ‘heterosexual,’ do I say, ‘straight’… not being slangy and not being pejorative”); or a perceived pressure for a certain kind of response (“I have to say something interesting”). In some cases, the lack of predetermined answers led to confusion about the nature of the question: “Questions can be interpreted in different ways (maybe that was the intention?). It was tricky on a couple to know what you were looking for from me”. These offer points for learning when developing the method, but it is notable that critical comments were made by only 7% of individuals.

Notably, some participants indicated that the free-text method influenced their opinion of their organisation and their willingness to engage with its work around diversity and inclusion. These reflections were exclusively positive. The use of free-text was regarded as “Thoughtful” and as reflecting a “more inclusive” attitude. A relationship of greater balance was described between the researching organisation and the research subject: “[it] can give respondents a voice”. Some participants even embedded in their responses direct messages of thanks: “I was permitted to express the non-binary side of my life. Thank you”. Gratitude was expressed specifically because the method encouraged individuals to feel a sense of care and security, in turn encouraging better engagement with the process: “you feel safe…it paints a more realistic picture of who we are. Thanks”.

**Conclusions**

The potential benefits of using free-text methods to contribute to the effectiveness of DM has been indicated in a limited number of research studies (e.g. Pringle and Rothera, 1996; Rankin and Bhopal, 1999; Ndofor-Tar et al, 2000; Byndner et al, 2001; Aspinall, Song and Hashem, 2008; Aspinall, 2012). In particular, the advantages of allowing open, self-categorisation for capturing the ethnic identities of those of mixed ethnic heritage have been demonstrated (Renn, 2000; Mahtani, 2002; Aspinall, 2003; Lincoln, 2008; Aspinall and Song, 2013: 22-32) and the specific contribution of this method to combatting prejudice has been emphasised (Stephan and Stephan, 2000; Prewitt, 2005; Aspinall, 2009). Ethnicity monitoring in free-text form is gaining some traction. From 2001, the British census allowed a small level of additional information to be added by respondents alongside certain “other” categories. Across the globe, censuses increasingly explore the addition of free-text responses (Morning, 2008). However, examples of organisations engaging in exclusively or predominantly free-text DM or using free-text monitoring for diversity areas other than ethnicity, are rare (see Statistics Canada, 2003; Ver Ploeg and Perrin, 2004; Ulmer, McFadden and Nerenz, 2009; Aspinall, 2012).

With this background, the present study acts as a contributor to a growing argument for free-text DM as a valuable tool for groups, organisations and communities to engage with the diversity of their members, employees and other groups with which they engage. Research has recognised the need for detailed and specific diversity profiles in order to include the most marginalised individuals in society and to develop practices which will nurture and develop diversity in meaningful and effective ways. It has also demonstrated the many ways by which tick-box forms damage participation in DM and fail to achieve the accuracy of data necessary for such work. The need for establishing new approaches to DM is clear. As we look for alternative methods, this study has shown that the free-text survey can produce organisational diversity profiles which possess depth and quality beyond those produced from standard tick-box methods, offering learning which cannot be achieved through counting membership of predetermined group categories. The free-text method used in this study allowed greater validity in the use of certain group identities, it allowed new group identities and kinds of group identity to emerge, it allowed the radical differences between individual experiences within traditional group identities to be understood, the variety of preferred language to be expressed, and aspects of change and transition in identity to be expressed.

Gathering detailed diversity data of this kind will not be a priority for some organisations engaging in DM. However, as discussed in the early part of this study, the value of this kind of information for the creation of effective EDI interventions and Diversity Management systems is well-established in research. Its value for gathering information about those most likely to be overlooked when considering diversity and inclusion in organisational contexts is also clear. This study has shown that free-text monitoring can offer significant value in the pursuit of such work.

*Quality and Utility*

One contribution of this study has been to demonstrate that enhanced data quality does not inevitably sacrifice data utility. Using relatively simple analytical and presentational tools, data collected through the free-text method enabled mixed reporting styles to be used to create diversity profiles which offered insights into the commonalities and the diversity of identities amongst stakeholders. These have already offered practical value for developing organisational practice in both organisations. Significantly for the discourse around DM methods, aspects of that organisational development are linked specifically to data gathered using the free-text method which would not have been collected using standard forms. In this way, the collection of data with enhanced quality through free-text DM in fact offered enhanced utility, not the opposite. This presents a challenge to the assumption that a trade-off between quality and utility is inevitable in identity data collection.

*Breadth in Diversity*

A further contribution of this study is to emphasise the broad spectrum of diversity strands for which free-text DM can gather complex and multi-layered information, and the value of that task. As the citations in this article illustrate, research exploring the need for change in DM practice is dominated by examples about ethnicity: the ‘superdiversity’ in British society (Vertovec, 2007). Using a free-text method has shown that the complexity of identity in ethnicity is overtaken in these particular cohorts by the complexities inherent in other diversity strands, disability being an important example. The relative complexities of different diversity strands will of course be impacted heavily by the participating organisations. However, the findings of this research indicate that the development of methods for measuring the many layers of human identity should encompass all the diversity strands. This, in turn, offers the potential to explore in future research the value of developing DM methods for informing wider discourses around intersectionality in human identity.

*Engagement and Purpose*

While some participants were challenged by being asked to engage in a free-text survey, the overwhelming majority responded to it positively. Research has shown that tick-box methods risk exclusion and negative engagement with DM, but this study has shown that the free-text method encouraged feelings of safety and inclusion. Indeed, it led directly to positive attitudes about the organisation engaging in the DM process and influenced the quality of engagement in that process. The findings of this research pose interesting questions about how DM can and should be used, asking whether process can be as important as product. When choosing the method for DM, an organisation should consider both its impact on the resulting data and also the message it sends about the organisation’s attitude to its stakeholders.

As research into DM methods continues, the positive response of participants to this form of data collection might also lead us to propose that the purposes of DM could be broadened. While the demonstration of compliance and the development of Diversity Management systems are the dominant reasons for engaging in DM, the data from this study shows that using a new methodology for DM allows us to think more creatively about what the process of collecting diversity data can achieve. The data collected in this research indicates that the development and the sustaining of relationships between the researching body and the research participant – in these cases an organisation and its members – can be nurtured by the process of collecting identity information in a way which allows all people to express themselves openly and freely. In being allowed space for individual expression, participants indicate they feel valued and affirmed. This interesting theme from the study suggests there is potential for DM to take on a purpose in itself as a relational tool, rather than simply being the means to collect information for other organisational purposes.

*A New Model?*

The result of this work is not a one-size-fits-all model for DM, whatever the organisational goal and context. As with any small-scale study, this examination of the free-text survey as a method for organisational DM calls for further testing. Future work into this area should examine the significance of different types and sizes of organisation in particular, examining how and to what extent differences of this kind impact particularly on the utility of the data collected. Related to this, the wider value of free-text DM should be tested by exploring the capacity of different organisations to manage the data analysis and reporting stages in generating reports from qualitative data, unaided by research professionals. A criticism of free-text methods for collecting diversity data is the belief that data will be unwieldy, difficult to analyse and expensive to use (e.g. Pringle and Rothera, 1996; Aspinall, 2009, 2012). Such criticisms sit alongside arguments for the continued categorisation of people into pre-determined groups as the only practical approach for achieving meaningful organisational engagement with diversity in an employment context (Prasad et al, 1997; Kirton and Greene, 2016:134-35). In order to provide a more comprehensive answer to such arguments, testing free-text DM in larger organisations and in organisations of a different category type (i.e. not membership bodies) will be necessary.

Despite these limitations, this study does demonstrate that the two cohorts included in the research produced diversity data with which the researchers were able to engage in a meaningful way to produce useful reports that have influenced practice. It demonstrates findings of sufficient potential to offer enough positive validation of the free-text method to promote its use amongst organisations and researchers wishing to engage meaningfully with stakeholder diversity and to nurture that diversity in effective ways. A model of DM which bypasses the potential stumbling blocks of tick-box methods and also offers practical tools for significant organisational learning and development, can be an encouragement to organisations otherwise hesitant about the value of DM. This and the evidence that free-text surveying inspires positive engagement amongst participants should further commend its use and development as a valid and mainstream method for DM.

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