Diversity Monitoring as Qualitative Research: an empirical study exploring the value of free-text demographic monitoring for organisational learning

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Abstract

Diversity Monitoring (DM) is a process by which organisations and communities gather information about the personal characteristics of stakeholders. The standard method of DM uses tick-box surveys to gather quantitative data about predetermined group identities. This paper reviews existing research to argue that this standard method fails to produce data appropriate for achieving many of the organisational purposes for DM. Tick-box surveys ignore the complexities of human identity and can lead to exclusion and diminished engagement.

The researchers advocate developing alternative approaches to DM. They describe an original, empirical study conducted with two UK-based professional membership organisations: the College of Mediators and the Diaconal Order of the Methodist Church in Britain. This study used a primarily qualitative method, inviting free-text responses to identity questions. The paper explores themes emergent from the resulting data, examining data validity and utility, and participant experience and engagement with the research method.

The researchers describe the methodological considerations of gathering qualitative data for DM and the resulting analytical process. They argue that free-text DM represents a viable method for organisations to balance the need for data validity and practical utility, while ensuring greater inclusion and nurturing positive relationships with participants.

Keywords: Diversity Monitoring; Diversity Management; EDI, Equal Opportunities; Human Diversity; Research Methodology; Qualitative Research.

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Introduction

Diversity Monitoring (DM) is a process by which information about the identities of individuals is gathered, from which a range of activities can emerge. DM is used by organisations to learn about clients, members, employees, applicants, volunteers, or other types of stakeholders. It is commonly used in the UK, for example, to collect data about applicants during organisational recruitment processes and to monitor access within communities to public services, including healthcare. DM forms the basis for reporting on employee and stakeholder identities in the private and public sectors. 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. An 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 achieving these purposes can be significantly hindered by the method used for gathering data.

The vast majority of DM follows a standard practice, commonly advocated in organisational studies and rarely challenged: a simple, tick-box survey which produces quantitative data about stakeholder membership of identity groups. The tick-box survey is designed to yield aggregate figures, counting individuals' choices from a list of predetermined group identities. It was adopted as the standard method for collecting data for Equal Opportunities (EO) initiatives, which emerged in response to equality legislation enacted in the 1960s and 1970s in the UK, North America and elsewhere. EO was motivated by the desire to bring about compliance with legal obligations about group representation, to act to prevent discrimination, and to enable equal access to opportunity amongst different demographic groups. Tick-box DM produced data from which progress, improvement and compliance could be tested quickly and easily. More recently, the EO agenda has been overtaken by increasingly complex approaches to human diversity within communities and across corporate and public sector organisations. Diversity data is used to support nuanced EDI activities, generating the need for more detailed and multi-layered data types, including from qualitative research (on which see Bendl *et al*, 2015; Booysen *et al*, 2018). However, the tick-box survey remains the standard for DM exercises across all sectors.

Despite its continued use, research increasingly demonstrates that the tick-box form is flawed as a method for gathering valid information about human identity which serves the needs of a complex EDI programme. This article explores the value of moving accepted practice in DM from the primarily quantitative to the primarily qualitative. It illustrates the risks and limitations of the standard tick-box model and asks whether a qualitative method, which removes predetermined group categories from the process, can be a better approach for gathering data to achieve organisational EDI goals. Drawing on findings across an original research study, which uses free-text DM surveys in two separate contexts, the article asks how this alternative method

can address the limitations of the tick-box format. The researchers investigate how a qualitative approach can impact data quality, affect the practical utility of DM data for organisations seeking to pursue an EDI agenda, and influence participant engagement and experiences. In so doing, they explore how DM processes can be more fully inclusive and themselves become tools for nurturing diversity.

The Tick-Box Method

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 asked a series of questions relating to personal characteristics and instructed to select an answer from a list of group identity options (e.g. female, British, married). These lists might include an 'other' category, sometimes with the possibility of adding a brief explanation, or a 'prefer not to say' option, most 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).

A consideration of the appropriateness of this method for gathering diversity data can be shaped around three areas:

- *Validity*: the impact of methodology on data validity.

- *Purpose*: the relationship between methodology and organisational goals.

- *Experience and Engagement*: the impact of methodology on research subjects.

Validity

The sacrifice of validity in the standard method is inherent to its design. Allocating individuals into predetermined group categories simplifies or fails to recognise the complexity that exists across societies (Brubaker, 2004; Prewitt, 2005; Bonnett, 2018). 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 meaningful (Bonnett and Carrington, 2000; Woodhams and

Danieli, 2000; Bhopal, 2002; Todd, 2005; Aspinall and Mitton, 2008; Aspinall, 2011a and 2011b).

The predetermination of group identity categories ignores the nature of personal identity as fluid and changing (Waters, 2000; Hitlin *et al*., 2006; Burton *et al*., 2010; Aspinall, 2012; Connelly *et al*., 2016). Historic data gathered using the standard method can require redaction in order to recognise new and emergent identities, to 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 amend past records (ONS, 2012).

Purpose

The perceived significance of these criticisms about data validity will be determined by an organisation's intended uses for the data. 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 predetermined group identities. The tick-box method is largely appropriate for this purpose, since those identity descriptors are 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. Those interventions might be pursued to create greater diversity within a particular context, to address the needs and rights of those with minority identities, or to develop practices within a particular context that harness effectively the known practical benefits of a diverse membership or workforce (Diversity Management).

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 (Kochan *et al*., 2003: 5-6; Kirkman *et al.*, 2004; Joshi and Roh, 2007; Herring, 2009: 208-09; Hamdani and Buckley, 2011; Theodorakopoulos and Budhwar, 2015). In order to avoid such failures, rather than simply adopting generic diversity strategies, policies and practices, organisations must develop their own bespoke practices and policies which are based on as much specific detail as possible about the people involved. This principle has been demonstrated in a range of research contexts (Aspinall and Anionwu, 2002; Kochan *et al*., 2003; Jayne and Dipboye, 2004; Walby and Armstrong, 2010; Köllen, 2013; Parameshwaran and Engzell, 2015). Significantly, such studies

sit alongside research which has shown that effective work to nurture diversity relies also on high participation amongst all stakeholders, 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 group categories provided as options on DM forms.

When aiming to develop or to harness the benefits of diversity, there is a pressing need for detailed accuracy when collecting demographic data about people. Identifying an effective DM methodology which offers that detailed accuracy is therefore vital for ensuring the practical effectiveness of EDI work. However, data validity cannot come at the significant sacrifice of practical utility in terms of process. There will be no benefit to creating a method for collecting data which offer detailed information in a form that cannot easily be used in practice. Testing a new methodology for DM against these dual priorities – achieving sufficient validity alongside sustaining practical utility – is the focus of this study.

Experience and Engagement

DM forms which require respondents 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 and 2011b; Köllen, 2013), encourage inaccurate constructs (Hacking, 1986; Werbner, 1990; Goldberg, 1997: 27-58; Aspinall, 2010), and inspire judgements about the relative value of groups (Jenkins, 2004; Aspinall and Mitton, 2008; Greene and Kirton, 2009; Walby and Armstrong, 2010; Gómez, 2012). 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 discrimination. 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).

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 EDI initiative is clear: in a standard DM exercise, those individuals most likely to be overlooked when communities and organisations

make 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 shape ideas about how to become more inclusive and to nurture diversity – will *a priori* exclude marginalised people, undermining the very purpose of that work. From the perspective of an organisation wishing to make the most of their diversity through shaping effective EDI and Diversity Management programmes, the impact is equally problematic. Those programmes rely for their success on detailed knowledge about, and high levels of participation amongst, stakeholders. Research methods which exclude individuals from the outset cannot be considered valuable Diversity Management tools.

Designing an Alternative Model

Most methodological developments designed to respond to the problems of data validity 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 group 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; 2009: 1428-32; 2012: 355).

Greater triangulation allows richer data sets to be gathered, but it does not address the underlying 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 that 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 qualitative methods. Qualitative research is commonly understood as more focused on the lived experience of research subjects than quantitative research, 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 at drawing out the experiences of the underprivileged (e.g. Blumer, 1954; Becker, 1967; Hammersley, 1992: 159-73; Denzin and Lincoln, 1994; Vidich and Lyman, 2000).

While quantitative research has been opposed by some equality movements as exclusivist and even anti-inclusion (e.g. Miles, 1993; Maynard, 1998), the advantages of qualitative methods are naturally attractive to EDI work. Mixed and qualitative research methods have been increasingly

well regarded in this field, where the need to capture the experience of individuals rather than to manipulate data into predetermined hypotheses has been underscored, where emphasis is placed on the desire for research to hold meaning for participants as much as for researchers, and where the importance of the intersectionality of identities is acknowledged (e.g. Marshall, 1984; Bowleg, 2008; Rogers and Kelly, 2011; Hunting, 2014; Bendl *et al.*, 2015; Booysen *et al.*, 2018).

Returning to the key limitations of the standard method for DM – data validity, participant experience and engagement – this discourse about methodological paradigms indicates the merit of exploring the value of a qualitative approach to DM, and doing that by focusing on two research questions:

- Can a qualitative method provide diversity data of sufficient validity to overcome the limitations of the tick-box method, while still being of practical use to an organisation or community?

- In contrast to tick-box forms, can qualitative DM be done in a way which does not exclude or alienate participants?

A qualitative method for DM was therefore developed by the researchers in order to address these two research questions. Free-text survey forms were created, which invited participants to describe themselves against a range of identity strands. Participants received the instruction to answer every question using their own words and by using as few or as many words as they wished. Crucially, the form omitted group identity options or prompts to use a certain kind of language, instead asking, "Please describe your ethnic identity"; "Please describe your gender identity", etc. The questions were crafted to ensure ease of comprehension and use for participants, shaped to feel as familiar as possible by using widely recognised language and being structured similarly to standard DM forms. The surveys solicited responses against nine diversity strands, mapped against protected characteristics in the UK Equality Act 2010. Retaining this legislation as the framework for investigating diversity ensured the research conformed to a standard and familiar conceptual basis for describing human diversity, and also that the language used to describe aspects of identity would be known to the participants.

Only one variation to the open-response format 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 information 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 for this study as possible, two further questions were added to the survey:

- "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 the legally protected characteristics.

- "From your perspective as a respondent, what do you think of this style of diversity monitoring?" – added to investigate participant views on the free-text model.

Research Study

Gathering Data

Surveys were issued to members of the College of Mediators (COM) in 2015 and members of the Diaconal Order of the Methodist Church in Britain (MDO) in 2017, both using an online survey tool and, for those who preferred it, a paper survey. Access to members was provided through their central offices, following meetings with key individuals to discuss the study and 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 professional membership organisations, of a similar size, with the same geographic spread. Both also had a similar relationship with DM before participating in the study, having performed it previously but not having made use of the data. Discussions with the leadership of both also identified a common desire to engage more fully with their organisational diversity in order to understand more about their membership and also to help develop their working practices. Challenges in relation to organisational diversity, including perceived identities as organisations which lack diverse memberships, were also held in common.

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

Analysis

Data analysis involved both qualitative and quantitative methods, recognising that the benefits of mixed approaches are increasingly regarded within social research (Bryman, 2006; Creswell and Plano Clark, 2011). Methods were chosen to respond appropriately to the nature and quantity of data gathered. 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) generated 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. 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 means of identifying and communicating patterns in large data sets (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. These were quantified and presented using simple statistical visualisations. These group identities were then interrogated further. Coding of the extended text from answers which associated with each emerging group resulted in detailed information about the nuances and diversity 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 visualisations and illustrative quotations.

Across the study, responses which did not fit into this framework were interrogated initially using content analysis to identify three types of information within each diversity strand: identity definitions that demonstrated complexity beyond the language used in standard tick-box forms; identity definitions that contained information not usually associated with the category in question; and multi-faceted approaches to human identity. Following this categorisation, 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 participating cohorts.

Within the disability strand, the addition of the yes/no question (described above) 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 scrutinise 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 review the data and to offer additional feedback on the method. Formal 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 data which led to each (for that information, see Shimada and Stephens, 2016; Susanna Wesley Foundation, 2018). Instead, it reflects 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. The focus of what follows is therefore on three areas of interest:

- The *quality* of the data collected and its subsequent *validity*.

- The *utility* of the data for informing organisational practice.

- The impact on *participant engagement and experiences*.

Quality and Validity

For several diversity strands, the quantification of individual words, phrases and numbers across both cohorts allowed reporting which made use of shared group identities, affirming group categorisation in principle as a helpful tool for understanding organisational diversity. Reports stated, for example, that over 50% of COM members identified as Christian, 85% as female, and that 90% of MDO members 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 chosen 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 drew out diverse language for describing certain group identities (for example "heterosexual", "straight", "attracted to the opposite sex"). It also enabled groups which are not listed on standard forms to emerge as identity markers important to participants. These included 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, qualitative data gathered in the surveys offered much more than a different route to discern group identities. The free-text format yielded nuanced information beyond the detail gathered in a tick-box form. For example, when asked about ethnicity, although 94% of respondents identified as a form of British/Irish and Caucasian, 13% did not provide either a standard word or a single category to describe their ethnicity. In every identity stream, responses 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 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 offered indications of this kind, including both positive ("good", "supportive", "committed") and negative ("complicated", "difficult") descriptors. Another theme 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 standard identity descriptions with information about practical details unique to their lives. Such answers repeatedly emphasised the limitations for participants of group categories like 'widowed' or 'married' as identity descriptions when very different lived experiences can be labelled in the same way. Similarly, the responses "living alone" and "single parent/adopted son", which would both fit into the category "single" in a standard DM form, show how two realities of inhabiting one group identity can be 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%). Respondents described 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 they had not sought official recognition ("long term back injury", "mobility problems"). 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, in practice, individuals' disabilities do not map neatly onto statistics recorded through official registers or verification schemes. Organisations relying on conventional monitoring forms, which ask simply whether someone has a disability, generate only partial knowledge about the extent of their membership's physical and mental diversity.

A significant body of responses to the free-text surveys also emphasised identities of change. 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 communicated. 23% of respondents across the two groups also described details of their past identities: where they had grown up, countries in which they had previously lived, past careers, and changes to their religion. The significance of this kind of information 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 that 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, we must consider their suitability for producing reports and analysis of practical use to organisations. The individual diversity reports created for each organisation in this study have been published and summarised

(see Shimada and Stephens, 2016; Susanna Wesley Foundation, 2018) and they establish in basic terms the capacity for free-text DM to produce functional and meaningful diversity resources. However, this article asks whether the free-text format for DM can lead to diversity reporting that achieves more than a standard method could offer. To this end, it is important to consider how the diversity reports produced for the COM and the MDO have so far contributed to each organisation's EDI agenda in ways which would not have been possible had the data been gathered using a tick-box exercise.

The COM has begun to embed new approaches to diversity in policy and practice at a national level using data gathered in the free-text survey. In 2016 it established the Working Group for Diversity and Inclusive Practice in Mediation, which takes the findings from the diversity study as the starting point for developing a new EDI framework. The COM aims to introduce practical measures in its recruitment and training to make the profession more accessible and to attract a more diverse membership. This significant organisational response illustrates the particular utility of free-text surveying, informed by data that tick-box DM would not have gathered. In the COM survey, the word "normal" appeared in response 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) can imply judgement: the belief that other people are in some way abnormal and 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 COM to identify a potential risk: if a member self-identifies as 'normal', this could influence or inhibit their working capabilities. The COM responded swiftly by putting in place measures to develop comprehensive and robust training provision regarding diverse identities, particularly for mediators engaged in family practice.

The word "transgendered" illustrates another example of the particular value of free-text DM for organisational practice. In the context of the MDO survey, some participants raised objections to this term in their responses and, later, during the presentation of the findings. Following these discussions, which took place at their national gathering, the MDO made the decision as a body to avoid the term completely, in order to show support for people affected negatively by its associations. In a standard DM form with predetermined categories, participants would have been unable to raise objections. The free-text method, in contrast, made this possible, resulting in a swift change in the organisation's practice.

Although at this stage a direct line between this DM exercise and formal decisions about national policy and practice in the MDO cannot be drawn, the report has achieved further influence. Information from it has been used by the MDO in its own annual reporting and governance meetings, as well as to inform organisational discussions around gender and sexuality. In

recognition of the method's effectiveness and positive impact, the MDO now makes use of free-text DM as part of the application process for incoming members of the Order.

Participant Engagement and Experiences

Across the study, 33% of respondents offered their personal views on the experience of completing the free-text DM form. Of these, 93% expressed positive opinions. These included simple declarations – "Excellent", "comprehensive and accessible", "important" – as well as more detailed opinions, including comparisons to the standard model: "better than just box ticking"; "I think it is refreshing not to be limited to ticking a box".

One strong theme which emerged 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". Participants valued the invitation to use their own words – "It gives more opportunity to give the full picture" – and to avoid the pressure of using 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 to improve the validity of 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 the appreciation amongst marginalised people of the greater opportunities for expression provided by the free-text format. Some participants expressed this in contrast to personal experiences 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"; "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".

Participants associated the valuing of marginalised individuals 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 anticipated by participants was 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".

This potential for learning was seen as an opportunity for influencing wider opinion about minority groups: "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". Responses expressed hope 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 their first real opportunity for 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, the task of making personal decisions about language led to negative reflections on the method: resistance to thinking about how to describe oneself ("I prefer the 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". While these comments represent useful information for developing the method, it is notable that negative comments were made by only 7% of participants.

Beyond expressing opinions on the method, some people indicated that the free-text forms influenced their opinions about their organisation and their willingness to engage with its work around EDI. These reflections were exclusively positive. The use of free-text monitoring was regarded as "Thoughtful" and as reflecting a "more inclusive" attitude. One participant described a relationship of greater balance 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". The free-text method encouraged in them a sense of care and security, in turn encouraging positive

engagement with the process: "you feel safe…it paints a more realistic picture of who we are. Thanks".

Conclusions

This study contributes to a growing argument for free-text DM as a valuable tool for groups, organisations and communities to engage with the diversity of their stakeholders. A body of published research demonstrates the many ways by which tick-box forms damage participation in DM and limit the validity of gathered data and their usefulness for complex EDI work. As we look for alternative methods are considered, this study indicates that the free-text survey can produce organisational diversity profiles which possess depth and quality beyond those generated by tick-box methods. In turn, free-text DM offers organisational learning which cannot be achieved through counting membership of predetermined group categories.

The potential for 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-designation for understanding the 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).

Despite this growing evidence base, examples of organisations that engage in exclusively or predominantly free-text DM, or that use free-text monitoring for diversity areas other than ethnicity, are rare (Statistics Canada, 2003; Ver Ploeg and Perrin, 2004; Ulmer et al., 2009; Aspinall, 2012). This study contributes further evidence of the value of a predominantly free-text approach in DM, encouraging its greater use and exploration. The free-text method used in this study generated greater validity in the use of certain group identities; facilitated the emergence of new group identities; allowed the expression of radical differences between individual experiences within traditional group identities; encouraged a greater variety of language to be expressed; and affirmed change and transition as important aspects of identity.

Gathering detailed diversity data of this kind will not be a priority for some organisations engaging in DM. However, the importance of this type of information in the creation of effective EDI interventions and Diversity Management systems is well-established in research. 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 that will nurture and develop diversity in meaningful and effective ways. This study shows that free-text monitoring can offer significant value in the pursuit of such work.

Quality and Utility

One important 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 the use of mixed reporting styles to create diversity profiles that offer insights into the commonalities and the diversity of identities amongst stakeholders. These profiles have already offered value for developing organisational practice. Significantly for the discourse around DM methods, aspects of this organisational development are linked specifically to data gathered using the free-text method that would not have been collected using standard surveys. In fact, free-text DM generated information with enhanced utility precisely because of its enhanced quality. This presents a challenge to the assumption that a trade-off between quality and utility is inevitable in the collection of identity data.

Breadth in Diversity

A further important 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 society (Vertovec, 2007). Use of the free-text method in this study has shown that for the members of these organisations the complexity of their ethnic identities is overtaken by the complexities inherent in other diversity strands, such as disability. In any study, the relative complexities of different diversity strands will be influenced 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 diversity strands. This, in turn, offers scope in future research to explore the value of developing DM methods for informing wider discourses around intersectionality in human identity.

Engagement and Purpose

While some participants felt challenged by the free-text survey, the overwhelming majority responded to it positively. Previous research has shown that tick-box methods risk exclusion and negative engagement with DM, whereas this study indicates that the free-text method encourages feelings of safety and inclusion. Indeed, it led directly to positive attitudes about the organisations 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 toward its stakeholders.

As research into DM methods continues, the positive response of participants to free-text data collection suggests that the purposes of DM could be broadened. While the demonstration of compliance and the development of Diversity Management systems are dominant reasons for engaging in DM, the data from this study show that using a particular methodology for DM allows us to think more creatively about the process of collecting diversity data, and what that process can achieve. This research indicates that the development and the sustaining of relationships between the researching body and the research participant can be nurtured by a process that allows people to express themselves openly and freely. In being allowed space for individual expression, participants indicate they feel valued and affirmed. 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 wider organisational purposes.

Encouraging Free-Text DM

This study into the value of free-text DM calls for further research, examining in particular the significance of working with different types and sizes of organisation. Future studies should ask how and to what extent differences of this kind impact particularly on the utility of gathered data. The potential for using free-text DM in a range of contexts should also be scrutinised by exploring the capacity of different organisations to manage the data analysis and reporting stages for generating reports from qualitative information. The utility of the free-text method in many situations will depend on the ability of organisations and individuals to conduct data analysis without the support of research professionals. Questions about the practicality of large-scale, free-text data analysis are incorporated into arguments that the categorisation of people into predetermined groups is the best approach for achieving meaningful engagement with diversity in an employment context (Prasad et al., 1997; Kirton and Greene, 2016: 134-35). In order to provide a comprehensive response to such arguments, testing free-text DM in larger organisations and in organisations of a different category type (i.e. not professional membership bodies) will be necessary.

Sitting alongside these practical considerations, the study also invites a more conceptual interrogation of free-text DM using a range of methodological perspectives on qualitative research. This might involve considering different categories of data validity affected by research design (e.g. Shadish et al., 2001) and criteria for analysing the trustworthiness of qualitative criteria (e.g. Lincoln and Guba, 1985). Nonetheless, this study has already influenced practice in

organisational settings outside of a research environment. The Methodist Church in Britain, the parent organisation of the MDO, has adopted free-text DM for a range of ministerial application processes. Separately, Fun Palaces, a charitable organisation which supports local initiatives to co-create cultural and community events, has used this study as a basis for designing its own DM process, drawing on the free-text model for use across the organisation's local projects. Future analysis of these organisations' continuing engagement with the model, and any resulting free-text data, will help to scrutinise the utility of the free-text model in wider contexts.

Recognising that the result of this research is not a one-size-fits-all model for DM whatever the organisational goal and context, its findings do have real value, encouraging a wider use of qualitative research in DM. Using free-text surveys, the two cohorts included in the study produced diversity data of sufficient quality and utility to produce reports that have influenced practice in ways beyond the capacity of the standard tick-box method. A model of DM which bypasses the potential stumbling blocks of tick-box surveys and also offers practical tools for significant organisational learning and development can encourage organisations that would otherwise be hesitant about the value of DM. The evidence that free-text surveys inspire positive engagement amongst participants should further commend the use of this method of DM as a helpful organisational tool. Free-text surveys should be treated as a valid, mainstream method for DM.

Acknowledgements

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Dr Lia D. Shimada is Senior Research Officer of the Susanna Wesley Foundation at Southlands College, University of Roehampton. From 2010 to 2013, Lia implemented the national strategy for diversity and inclusion for the Methodist Church in Britain. Previously, she worked in the peacebuilding sector in Northern Ireland, where she facilitated civic dialogue on migration, racism, and paramilitary conflict transformation. Lia holds a PhD in Geography from University College, London and a master's degree in Theology from King's College, London. Her edited book *Mapping Faith: Theologies of Migration and Community* is published by Jessica Kingsley.