MANAGER'S TOOLKIT: ENCOURAGING EMPLOYEES TO SELF-IDENTIFY

GETTING STARTED

INVESTING ETHNICITY

This document forms a part of the Maturity Matrix framework:

INSIGHTS (A): DATA

A Practical Guide for Building Trust & Increasing Participation

Why Self-ID Matters for Our Workplace

Self-identification (Self-ID) is the foundation for building an inclusive workplace. When employees voluntarily share demographic data (e.g., race, gender identity, disability status, LGBTQ+ identity, neurodiversity), companies can:

✔ Identify gaps in representation and career progression.
✔ Improve workplace policies and benefits to meet diverse employee needs.
✔ Strengthen equity & fairness in hiring, promotions, and retention.
✔ Foster a culture where every employee feels valued and included.

However, for employees to feel comfortable self-identifying, they **must trust** that their data will be used responsibly. Managers play a **key role** in building that trust.

Identify Gaps in Representation

Self-identification (Self-ID) data helps organisations identify underrepresented groups in leadership, departments, and promotion pipelines. With these insights, companies can create mentorship, sponsorship, and leadership programs to ensure equitable career growth. Without Self-ID, disparities remain hidden, limiting opportunities for all employees.

Improve workplace policies & Benefits

Self-ID data enables companies to shape policies and benefits that reflect employee needs. It informs enhancements like parental leave, mental health resources, flexible work arrangements, and disability accommodations. Understanding workforce demographics allows organisations to create more inclusive and supportive policies.

Strengthen Equity & Fairness

Beyond hiring, Self-ID data ensures fair access to career growth. It helps track trends in recruitment, pay equity, and advancement, identifying systemic barriers. By addressing these gaps, companies create a fairer workplace where all employees have equal opportunities to succeed.

Fosters culture of value and inclusion

Self-ID strengthens workplace culture by ensuring employees feel seen and supported. It drives meaningful change, such as employee resource groups, recognition programs, and accessibility improvements. A culture of belonging boosts engagement, collaboration, and job satisfaction, benefiting both employees and the organisation.

YOUR ROLE AS A MANAGER IN THE SELF-ID PROCESS

When discussing **self-identification (self-id)**, it's important for both **managers and employees** to understand **why it matters** and **how it benefits them and the workplace**. The key to motivation is **connecting self-id to real, positive changes** in the company. As a manager, you can help increase self-id participation by:

1. Communicating Why Self-Id Is Important
Self-id data drives real business outcomes by shaping workplace policies, improving benefits, and ensuring fair hiring and career advancement. When employees participate, organisations can make informed decisions that foster equity, inclusion, and a culture where everyone thrives.

2. Incorporating Self-Id Messaging Into Everyday Conversations
Managers should integrate self-id discussions naturally into team meetings and one-on-one check-ins, emphasising its role in improving the workplace. Framing it as an opportunity rather than an obligation ensures employees feel informed, not pressured.

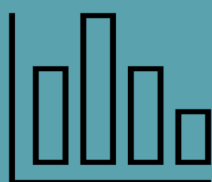## 3. Sharing You Own Perspectives and Experiences
Leaders who share their own experiences with identity and workplace inclusion help employees see the value of self-id. Personal stories build trust and demonstrate how participation leads to meaningful change, making the process more relatable.

4. Answering Common Questions & Addressing Concerns
Employees may hesitate to self-identify due to privacy concerns or uncertainty about how data will be used. Managers should provide clear, transparent answers about confidentiality, voluntary participation, and how the data drives positive workplace initiatives.

5. Answering Common Questions & Addressing Concerns
Self-ID should be an ongoing, voluntary process with multiple touchpoints—such as onboarding, HR check-ins, and internal campaigns. Regular reminders reinforce its importance while ensuring employees can participate when they feel comfortable.

INCREASING PARTICIPATION

- Communicating why Self-ID is important
- Incorporating Self-ID messaging into everyday conversations
- Sharing your own perspective and experiences
- Answering common questions & addressing concerns
- Providing multiple opportunities for employees to self-identify

EXAMPLES OF CORE MESSAGES

Core Message for Employees

"Self-ID helps us understand who we are as a company so we can create a workplace where everyone feels valued, supported, and included. It's completely voluntary and confidential, but the more we understand our workforce, the better we can shape policies, benefits, and career opportunities to reflect everyone's needs."

Example 1: Improving Workplace Benefits

"Last year, our Self-ID data showed that a significant number of employees identify as caregivers for elderly family members. Because of that, the company introduced flexible caregiving leave. This is just one way that sharing identity information can help create real, positive change."

Example 2: Enhancing Accessibility & Inclusion

"Through Self-ID, we learned that a portion of our employees are neurodivergent. That led to improvements like quiet workspaces, increased accessibility in digital tools, and updated interview processes to be more inclusive. If we don't have the data, we can't make these improvements."

Example 3: Supporting Equitable Career Growth

"Data from Self-ID helps us ensure that promotions and leadership opportunities are equitable. Many companies have used this data to create mentorship programs that support underrepresented groups in advancing their careers."

"Once colleagues saw how data was being used, through reporting and dashboards, we saw better declaration rates."

DISCLOSURE RATES

We recommend that useable data needs to be over 70%, however data gets more accurate as you get to 90% disclosure rate.

TIPS

Business departments have been made accountable for their disclosure rates. Department heads ensured that the correct comms filtered through their teams through line-manager communications. This helped ensure disclosure rates increased.

MOTIVATING EMPLOYEES

"WHAT'S IN IT FOR ME?"

Employees may be more likely to participate in self-id if they see how it benefits them personally. Below are some key motivators:

1. Better Workplace Policies & Benefits

By knowing who makes up our workforce, we can improve benefits like parental leave, healthcare options, mental health support, and flexible work policies.

2. More Inclusive Career Development & Leadership Opportunities

Self-id helps identify gaps in representation and allows us to create fair promotion opportunities, mentorship programs, and leadership development for all employees.

3. Improved Accessibility & Support For All Identities

Sharing disability, neurodiversity, gender identity, or LGBTQ+ status helps ensure our workplace is inclusive—whether that's updating digital tools, creating safe spaces, or enhancing accommodations.

4. Representation Leads To Action

Companies that track identity data are better equipped to build DEI programs that actually reflect employee needs—like expanding holiday flexibility, creating employee resource groups (ergs), or establishing fair hiring policies.

5. Safe & Inclusive Work Culture

Self-id data helps companies identify challenges like pay gaps or lack of representation in certain roles, allowing them to take real steps toward improvement.

USING STORYTELLING TO BUILD TRUST

Managers can help employees see the impact of Self-ID by **sharing real stories**.

Personal Story (if comfortable):
"I personally decided to self-identify because I want to contribute to making our workplace more inclusive. I realised that by sharing my background, it helps shape policies that benefit employees like me."

Be Authentic and Relatable

Employees connect best with genuine stories. Managers should choose personal experiences or company examples that feel honest, not scripted. If sharing a personal story, it should reflect real feelings and motivations, showing vulnerability in a way that builds rapport.

Link the Story to a Meaningful Outcome

A strong story should highlight how Self-ID leads to real change. Whether it's a company policy that improved because of employee participation or a broader industry trend, the message should reinforce that Self-ID has tangible benefits

Acknowledge Employee Concerns

Trust is built when employees feel heard. A good story should address common hesitations—such as concerns about privacy or skepticism about impact—by showing how Self-ID data has been used responsibly to improve workplace culture.

Keep it Simple and Conversational

Managers don't need to be professional storytellers—simple, natural conversations are the most effective. Using "I" statements and real examples helps employees see themselves in the story and feel empowered to participate.

Reinforce the Message Over Time

Storytelling isn't a one-time effort. Managers should weave these messages into team meetings, casual check-ins, and larger company discussions to reinforce trust and keep the conversation going.

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HOW EMPLOYEES CAN DISCUSS SELF-ID WITH THEIR MANAGER

Employees may want to **ask about self-id** in a way that aligns with their comfort level. Below are examples of **how direct reports can initiate conversations** with their manager:

Example 1: asking how the data will be used

"I saw the self-id initiative and was curious about how the company will use this information. Can you share some examples of how it has influenced policies in the past?"

Example 2: clarifying confidentiality

"I want to support DEI efforts, but I'm a bit concerned about privacy. Can you confirm that my information won't be linked to performance reviews or shared publicly?"

Example 3: advocating for change

"I noticed that we don't currently have an LGBTQ+ employee resource group. If more people self-id, could this help in creating one?"

Example 4: encouraging participation

"I think self-id is a great initiative because it helps ensure all voices are heard. Have you encouraged our team to participate? I'd love to hear your thoughts on why this matters."

HOW TO TALK ABOUT SELF-ID: MESSAGING EXAMPLES

1. Announcing the Self-ID Initiative in a Team Meeting

Example Talking Points:

"Our company is committed to making meaningful progress in diversity, equity, and inclusion. A big part of that is understanding who makes up our workforce so we can build policies and programs that reflect everyone's needs. Right now, we're asking employees to voluntarily self-identify. This helps us track equity in promotions, hiring, and employee experiences. It's completely confidential, and you can opt in or out at any time. If you have any questions, I'm happy to talk about it or direct you to the DEI team."

2. Answering Employee Concerns About Privacy

Employee Concern: "I don't want my identity used against me."

Response:

"I completely understand that privacy is a concern. The company follows strict confidentiality guidelines, and no one can see individual responses—only aggregate data is used. The goal is to improve workplace policies, not single anyone out. If you'd like, I can share how similar data has been used in the past to create positive change."

Employee Concern: "How is this different from just looking at HR records?"

Response:

"Good question! While we have some demographic data from hiring, it's incomplete, and it doesn't capture the full diversity of our team—such as neurodiversity, LGBTQ+ identity, or disability status. Self-ID helps us understand employee experiences in a more inclusive way, beyond what's in HR records."

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HOW TO INTEGRATE SELF-ID INTO EVERYDAY CONVERSATIONS

Instead of a one-time announcement, managers should **organically include Self-ID messaging** in regular interactions:

During 1:1 Meetings – "Have you seen the Self-ID initiative? Let me know if you have any questions."
In Performance Reviews – "We want to make sure our development programs work for everyone—Self-ID helps us track that."
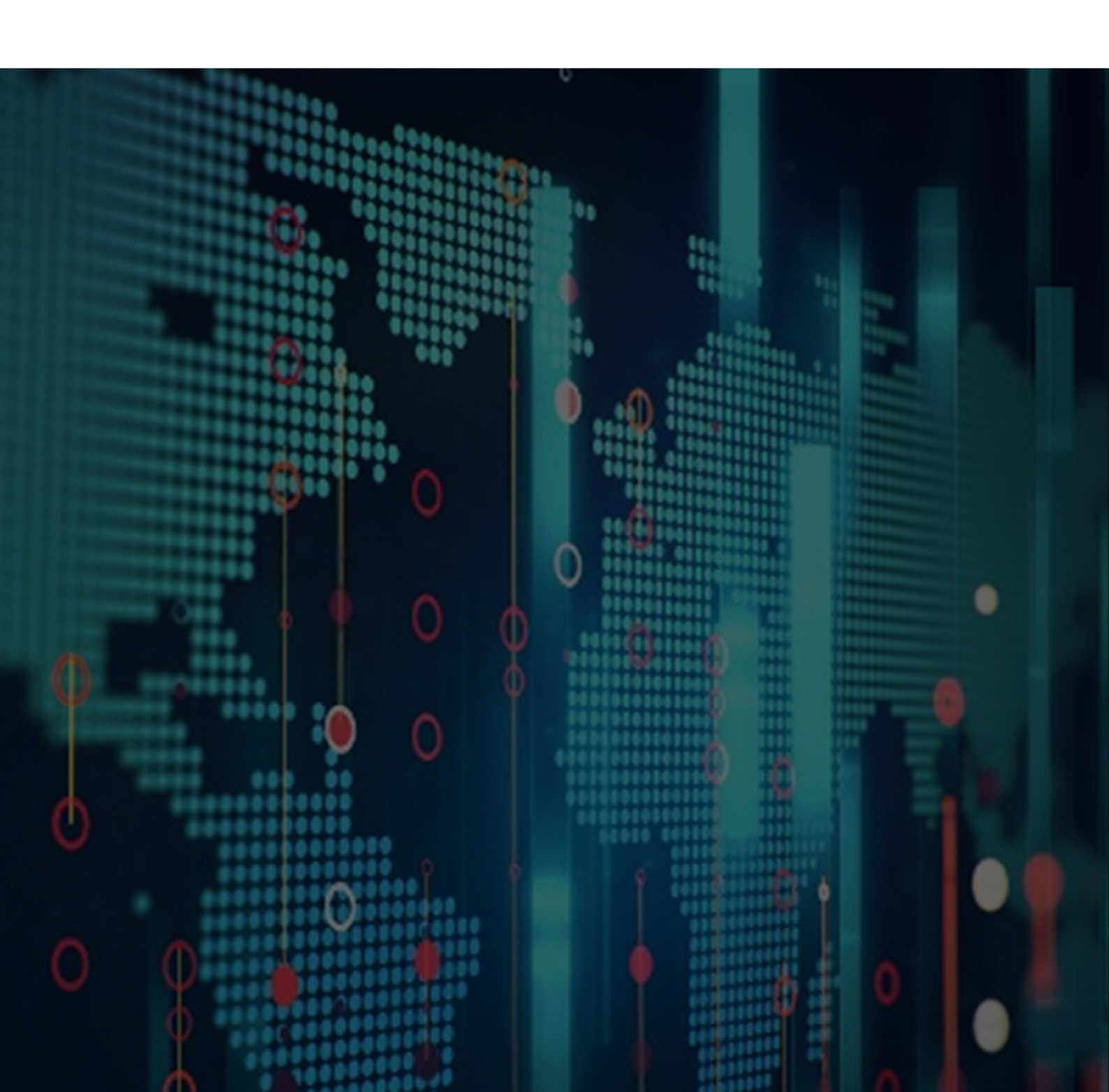**In Employee Resource Groups (ERGs)** – "If ERG members feel comfortable self-identifying, it helps us push for company-wide change."
During Team Diversity Discussions – "Self-ID data allows us to measure the impact of DEI programs and keep improving."

KEY TAKEAWAYS FOR MANAGERS

✓ self-id is important because it helps shape policies, benefits, and dei programs that reflect employees' real needs.

✓ managers should communicate how past self-id data has driven real change.

✓ employees should feel empowered to ask questions, understand confidentiality, and advocate for workplace improvements.

✓ making participation feel safe, meaningful, and impactful will encourage more employees to self-identify.

✓ be transparent – employees need to know why self-id matters and how their data will be used.

✓ build trust – address concerns about privacy and confidentiality upfront.

✓ lead by example – if comfortable, share your own participation to encourage others.

✓ use storytelling – show how past self-id data led to real workplace improvements.

✓ incorporate self-id into conversations – keep it natural and ongoing, not a one-time request.