Diversity measurement tool manuals

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Diversity measurement tool: General information

The diversity measurement tool has four sets of manuals to guide you through the use of the tool:

1. **General information** providing background information and methodology as well as details on how to understand the diversity
2. **Collecting data** providing information on how to search for profiles on LinkedIn and how to obtain the relevant data
3. **Applying data** providing step-by-step guidance on how to enter data into the excel tool
4. **The Excel tool** is a separate manual in Excel providing detailed guidance on the Excel related steps.

General information

The purpose of this guide is to provide instructions on how to use the diversity measurement tool and information regarding the methodology.

This diversity measurement tool was originally used in a qualitative study by ISS and proacteur and was developed to rank Danish companies' level of diversity based on gender, ethnicity, age and tenure.
The diversity assessment tool combines and builds on the methods and processes used by ISS and proacteur. It is intended to provide diversity partners with a tool to statistically measure diversity within management in organisations.

METHODOLOGY

The tool uses the following data which is either 1) collected or 2) derived from user profiles on LinkedIn:

1) Name, Sector, Leadership Level,

2) Gender, Age, Ethnicity, Seniority

The person who collects the data logs into a LinkedIn profile from where they will search for user profiles from the chosen companies. Data will be obtained/derived from the LinkedIn profiles and entered into the Excel tool. Diversity measurements analysed in the tool can be used for further analysis.

The personal data entered into the tool is considered to be sensitive/confidential.
Please review your local laws to ensure compliance before distributing or sharing.

UNDERSTANDING THE DATA

The diversity scores are calculated in the Excel tool using existing research within diversity.

The diversity calculation score is a number indicating the level of diversity based on the data included. A score closer to 1 indicated a high diversity factor whereas a score closer to 0 has a low diversity factor.

Note: If looking at the scores directly in the pivot tables the numbers are inverted so a score closer to 0 has a high diversity factor, while a scores closer to 1 has a low diversity factor.

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Diversity measurement tool: Collecting data

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1 Step 1: Identify companies

The diversity measurement tool can facilitate a number of requirements, including the ability to assess:

- Different types and sizes of companies
- Companies operation exclusively domestically or globally
- A large group of companies in a short time frame

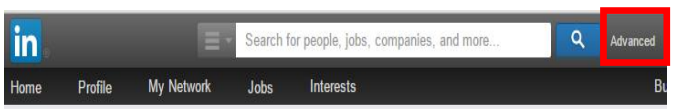
The diversity partner should determine which companies should be included in the analysis based on local needs. Each organisation should be assigned a unique organisation ID# (see how-to in manual 4)

See guide in Excel tool

Recommendations

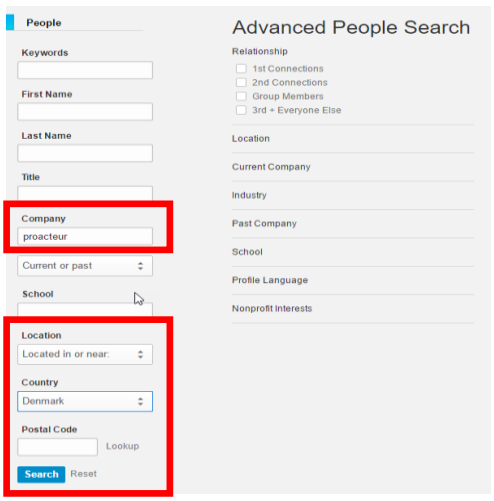
- Ideal sample size is approx. 30 profiles per company. Companies with < 9 profiles should be excluded.
- When collecting the data, search from a profile that has a large number of connections (500+).
- Search from a LinkedIn account with Premium level access, in order to get wide results and more filtering options.
- Complete the data input within 30 days

2 Step 2: Search for profiles on LinkedIn



▶ Open www.linkedin.com

▶ Navigate to the search bar and click on **Advanced** to the right of the magnifying glass



The advanced search settings displays:

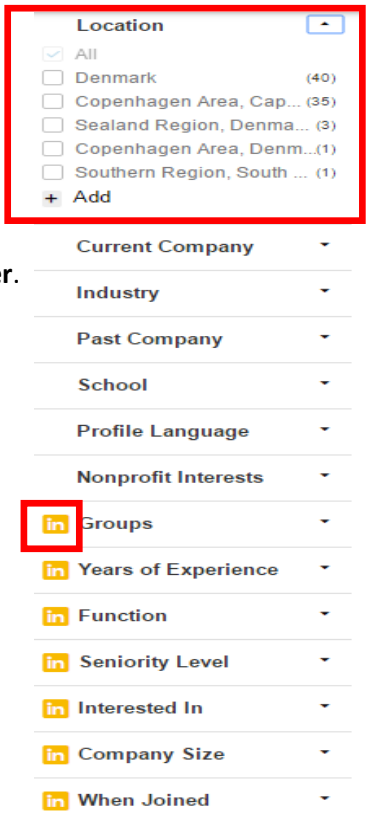
▶ Under **Company** enter the organisation's name for which you wish to find profiles (e.g. proacteur)

▶ Under **Location** select **Located in or near** from the dropdown menu

▶ Under **Country** enter your desired location. (e.g. Denmark)

▶ Click on **Search** when done

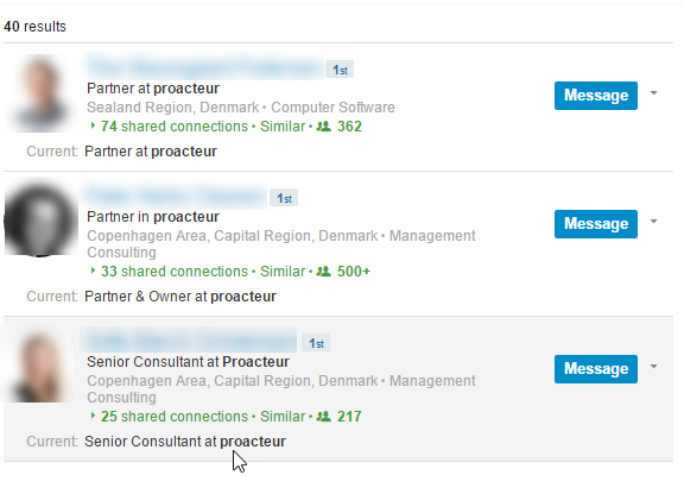
2 Step 2: Search for profiles on LinkedIn (continued)



You should now see the profiles from the chosen company

▶ You can apply additional filters to your search

TIP: Narrow down the location to a desired metro area, such as "Copenhagen area" by scrolling further down the page to the **Location filter**.



Recommendation

We recommend that you obtain a premium account for this analysis as some categories (indicated by a gold icon) are available only to premium LinkedIn account holders.

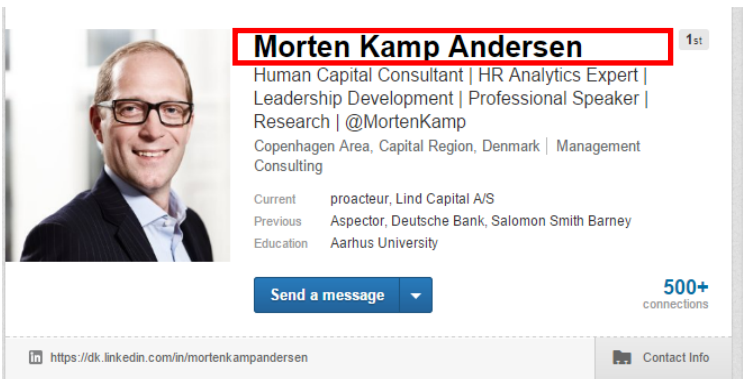
3 Step 3: Obtain data from profiles

Obtain data from the profiles regarding the following

- ▶ **NAME**
- ▶ **SECTOR**
- ▶ **GENDER**
- ▶ **ETHNICITY/ORIGIN**
- ▶ **LEADERSHIP LEVEL**
- ▶ **AGE**
- ▶ **SENIORITY**

NAME

▶ Obtain from the **Heading** of the profile (e.g. Morten Kamp Andersen)



GENDER

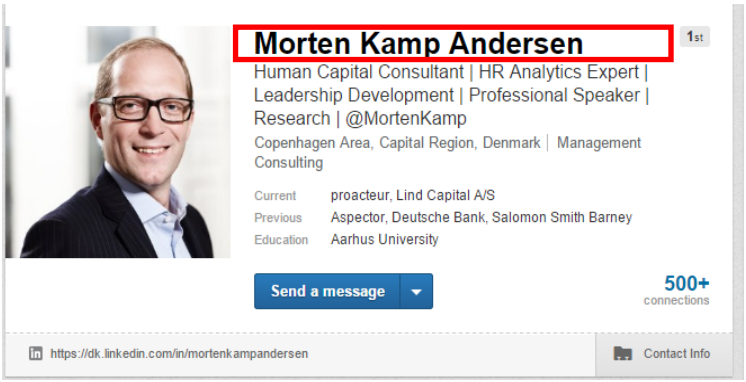
▶ Categorise male/female based on **Name** and **Profile picture**

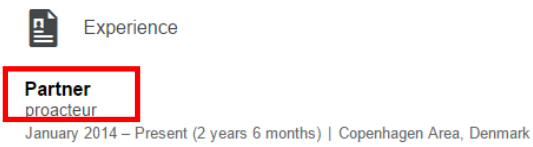
3 Step 3: Obtain data from profiles (continued)

LEADERSHIP LEVEL

▶ Obtain from eigther the **Heading** or under **Experience** in current position (e.g. Partner)

Categories are restricted to: Manager (incl. Project manager), Director, Vice President, Partner, Board member, CXO (e.g. CEO, CIO, CFO, etc.) and Owner





SECTOR

▶ Obtain from the **Heading** (e.g. Management consulting)

Categories are restricted to: Automotive, Building, Consulting, Consumer goods, Energy, Financial, IT, Machine, Pharmaceutical, Service, Textile, Transport

ETHNICITY/ORIGIN:

▶ Profiles should be assumed to have the ethnicity/origin of the **Home country** if not contradicted by other indicators.

Categories are restricted to: Home Country, Africa, Asia/Oceania, Eastern Europe (including Russia) Middle East, South America and Western Europe (including North America

▶ Check for indicators of ethnicity/origin different than the home country such as:

- Native language different from that of the home country
- Listed elementary/primary school in another country

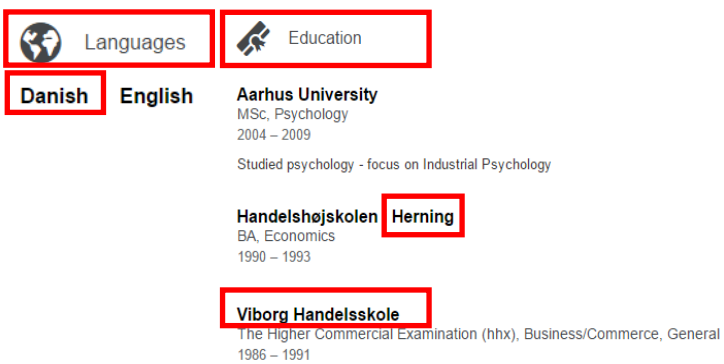
A foreign name can be used to back other indicators, but does not qualify a foreign ethnicity per se.

EXAMPLE OF DANISH ETHNICITY/ORIGIN

✓ No clear indication of ethnicity/origin outside of home country in profile

✓ Language and schools are Danish

✓ Assign Denmark as home country ethnicity

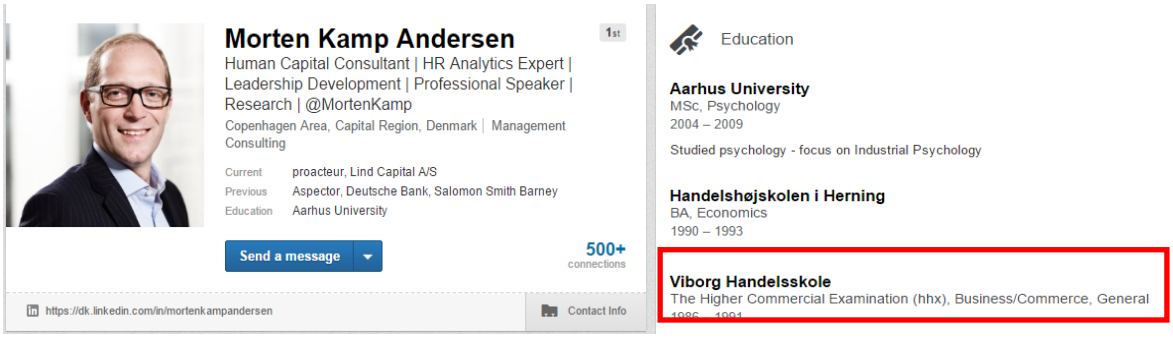


3 Step 3: Obtain data from profiles (continued)

AGE:

▶ Estimates should be based on present year subtracted by year of graduation from earliest listed education, plus a number (age at graduation) depending on the level of that education. Use local best estimation of age at graduation.

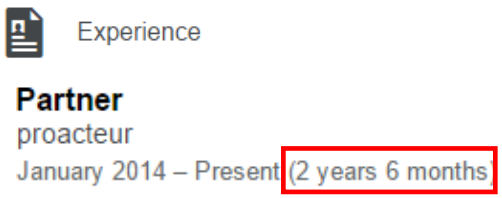
EXAMPLE: Morten graduated from high school in 1991. Typical age of this type of graduation in home country is 19. The graduation date was 25 years ago. 19 + 25 = 44. Choose the age range in the drop down menu of the Excel tool that includes age 44.



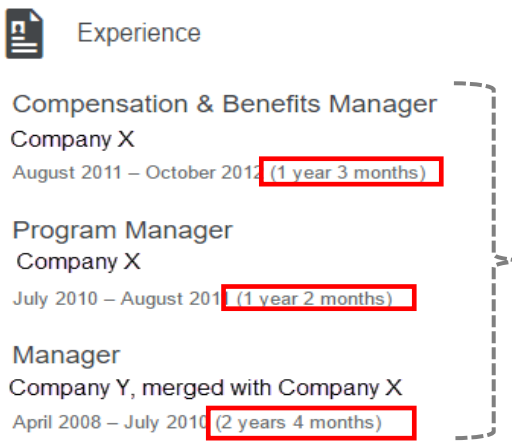
SENIORITY

Length of service within curent company

▶ Obtain information from work **Experience.**



If there are multiple positions within the same company listed in their profile these should be added to achieve the total seniority (c.f. example below). This may include mergers.



CALCULATION
3 positions at Company X. Add:
1 year, 3 months +
1 year 2 months +
2 years 4 months

Total of 4 years 9 months seniority

▶ Insert in the Excel tool by choosing the fitting predetermined category from the dropdown menu

When you have completed the collection of data you are ready to apply the data into the Excel tool

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Diversity measurement tool: Applying data

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The data collected in steps 1-3 must now be entered into the Excel tool. There are four additional steps when inserting the data

4) Populate the data input tab
5) Validate data
6) Check pivot tables and sample population
7) Create diversity scores and rankings

For additional guidance see also the how-to guide in Excel

See guide in Excel tool

- An example row has been created in the data input tab. Please **delete** when finished.
- Read the information highlighted by yellow boxes with **important information** on each of the tabs in Excel.
- The Excel tool will automatically calculate diversity scores. Be cautious not to alter the structure of the sheets or formulas.

4 Step 4: Populate the data input tab

▶ Save a copy of the tool as a seperate file to work in before you start entering data

▶ The format used in the fields are as follows:

Field	Excel format
Organisation ID #	Free text (Enter one unique numerical ID# per company)
Full Organisation Name	Free text column
Name	Free text column
Sector	Select from dropdown list
Leadership Level	Select from dropdown list
Sex	Select from dropdown list
Age	Select from dropdown list
Ethnicity	Select from dropdown list
Seniority	Select from dropdown list

▶ Enter the data that you have collected in steps 1-3 into the data input tab. The data input tab has been set up as shown below:

Organisation ID#	Full organisation name	Name	Sector	Leadership Level	Gender	Age	Ethnicity/Origin	Seniority
999	*Example row - delete when finished*	*John Doe*	*Food*	*Director*	*Female*	*20-25*	*Home country*	*0 to 5*
1	ABC	xxxx	Building	*Board member*	*Male*	*31-35*	*Asia/Oceania*	*6 to 10*
1	ABC	xxxx	Building	*CXO*	*Male*	*26-30*	*Home country*	*6 to 10*

5 Step 5: Validate data

Once the data input is complete you should validate the entries. Suggested validation includes:

- ✓ Check that there are no blank fields
- ✓ Check that each organisation has a unique ID#
- ✓ Check that organisation names are spelled consistently (including periods, commas, abbreviations)
- ✓ Check that the same industry has been selected in the dropdown for each single organisation
- ✓ Check that you have deleted the example row

6 Step 6: Check pivot tables and sample population

This step has three sub-steps to follow:

▶ **REFRESH PIVOT TABLES**

▶ **CHECK THAT EACH PIVOT TABLE HAS THE CORRECT APPEARANCE**

▶ **ALTER FORMULAS WHEN NEEDED**

The pivot tables will calculate the respective diversity scores. Results will show in the diversity score tab.

- The calculation formulas must not be moved from their designated columns.
- Do not delete any blank columns even though no data is populated.
- Read the yellow box on each tab.

To refresh the pivot table, click anywhere inside the table, then under Pivot Table Tools>Analyse, choose Refresh

Count of Gender		Column Labels				Diversity Calculation
Row Labels	Full organisation name	Female	Male	(blank)	Grand Total	
1	ABC	1	2		3	0,56
2	XYZ	2	2		4	0,50
3	Test	2	2		4	0,50
(blank)	(blank)					#DIV/0!

IMPORTANT
Do not move the diversity calculation column. It must remain in column G.
The formula will calculate automatically once data has been input in the "data input" tab.
Where there is no data, the cell will display "#DIV/0!" .

REFRESH PIVOT TABLES

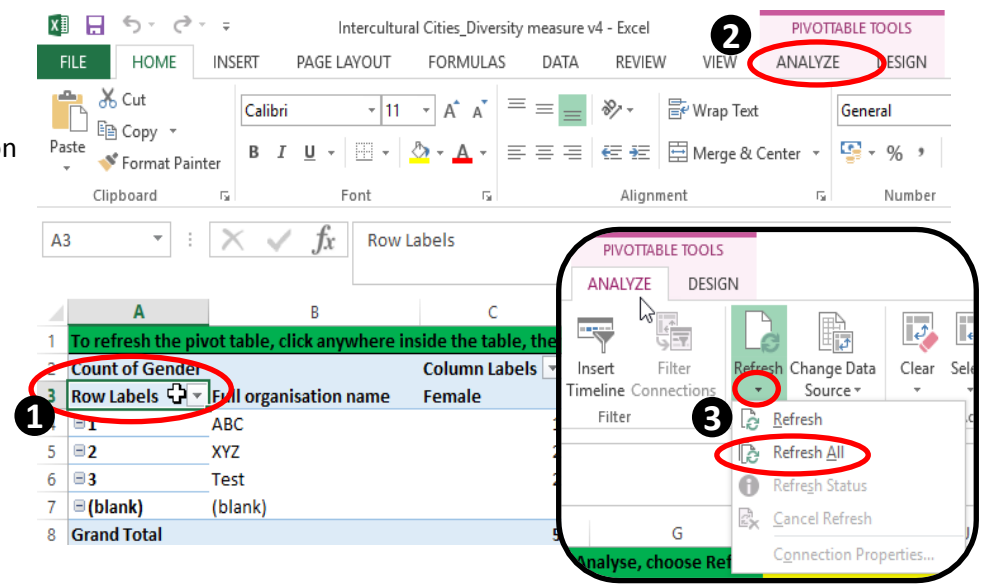
▶ Start on the **Gender tab**.

You can refresh all the pivot tables at once

▶ Place your mouse cursor on **Row Labels ❶**

▶ This opens the **PivotTable tools toolbar ❷**

▶ Click on **Analyze** then select **Refresh** All from the dropdown menu **❸**



6 Step 6: Check pivot tables and sample population (continued)

CHECK PIVOT TABLES AND SAMPLE POPULATION

▶ Check that each pivot has the correct appearance.

If you have data that covers each of the categories in a diversity measure, the pivot will appear like this:

To refresh the pivot table, click anywhere inside the table, then under Pivot Table Tools>Analyse, choose Refresh All										
Count of Seniority		Column Labels								
Row Labels	Full organisation name	0 to 5	6 to 10	11 to 15	16 to 20	21 to 25	26 to 30	Over 30	(blank)	Grand Total	Diversity Calcul
1	ABC		2		1					3	0,56
2	XYZ				1	1		1	1	4	0,31
3	Test	1		1	1	1				4	0,25
(blank)	(blank)										#DIV/0!
Grand Total		1	2	1	3	2	1	1		11	0,18

Note: The green bar will always cover column A through to the diversity calculation

If you do not have data in one of the categories, then the pivot will appear like this:

To refresh the pivot table, click anywhere inside the table, then under Pivot Table Tools>Analyse, choose Refresh All										
Count of Seniority		Column Labels								
Row Labels	Full organisation name	0 to 5	6 to 10	11 to 15	16 to 20	21 to 25	Over 30	(blank)	Grand Total		Diversity Calcul
1	ABC		2		1				3		#DIV/0!
2	XYZ	1			1	1	1		4		#DIV/0!
3	Test	1		1	1	1			4		#DIV/0!
(blank)	(blank)										#DIV/0!
Grand Total		2	2	1	3	2	1		11		#DIV/0!

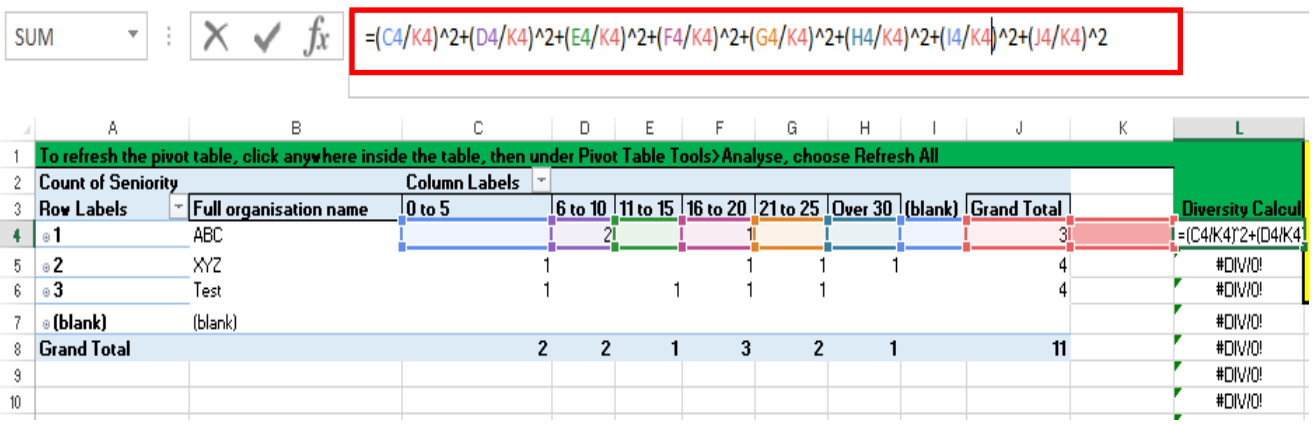
In this example there is a blank column (no data with seniority of 26-29 years). Do **not** remove blank columns

▶ The diversity calculation formula must be adjusted manually (see below)

ALTER FORMULAS WHEN NEEDED

Pivot tables are dynamic tables dependent on their data input. Each diversity measurement has it's own section with the exact formula that needs to be copied and pasted in, depending on how many categories are missing.

In the example one category is missing (column K "seniority between 26-29 years") and therefore the formula will need to be replaced



	A	B	C	D	E	F	G	H	I	J	K	L
1	To refresh the pivot table, click anywhere inside the table, then under Pivot Table Tools>Analyse, choose Refresh All											
2	Count of Seniority		Column Labels									
3	Row Labels	Full organisation name	0 to 5	6 to 10	11 to 15	16 to 20	21 to 25	Over 30	(blank)	Grand Total		Diversity Calcul
4	1	ABC		2		1				3		=(C4/K4)^2+(D4/K4
5	2	XYZ	1			1	1	1		4		#DIV/0!
6	3	Test	1		1	1	1			4		#DIV/0!
7	(blank)	(blank)										#DIV/0!
8	Grand Total		2	2	1	3	2	1		11		#DIV/0!
9												#DIV/0!
10												#DIV/0!

▶ Insert the new formula by pasting directly into the cell (in this example L4) replacing the old one =(C4/J4)^2+(D4/J4)^2+(E4/J4)^2+(F4/J4)^2+(G4/J4)^2+(H4/J4)^2+(I4/J4)^2

See guide in Excel tool

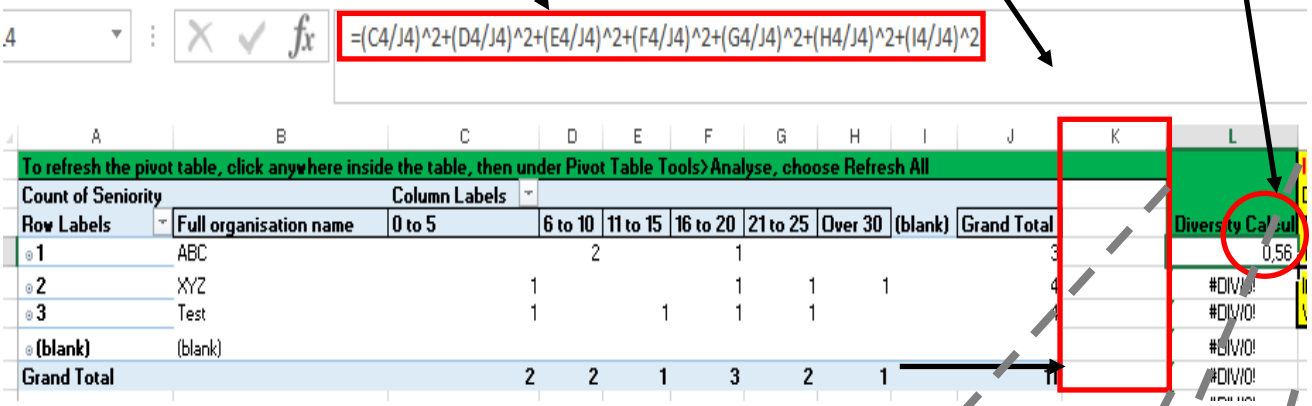
6 Step 6: Check pivot tables and sample population (continued)

ALTER FORMULAS WHEN NEEDED (CONTINUED)

▶ The new formula can be pasted directly into the cell (in this example L4), replacing the old one

Do not delete empty columns

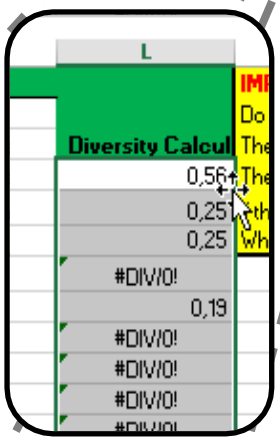
The new formula will automatically calculate the diversity score



▶ Paste the formula to the rest of the column by double clicking the bottom right corner when black cross is displayed.

See Excel how-to for further guidance

See guide in Excel tool



If you add data later and no longer have a missing category you will have to switch the formula again to include the full formula.

After finalizing the pivot tables please check a sample population

▶ Select up to five companies and manually check if the data entered on the data inputs tab appears in the respective pivot table

▶ Check for:

- ✓ Totals look correct
- ✓ Data missing from the pivot
- ✓ Formula did not calculate

7 Step 7: Create diversity scores and rankings

The diversity scores tab automatically takes in the diversity scores from each of the pivot tables.

▶ You may need to refresh the sheet by pressing **F9**

The formulas have all been pre-populated but may appear as #DIV/0! , or #N/A prior to refreshing or if there is no data in those rows.

A **Weighted diversity score** is also calculated automatically as certain diveristy factors have a greater effect on an organisation:

Weighted diversity score
- ▶ Gender =35%
- ▶ Age =10%
- ▶ Seniority =20%
- ▶ Ethnicity =35%

Do no further. The information is carried over to the **Diversity ranking tab**.

To refresh the pivot table, click anywhere inside the table, then under Pivot Table Tools>Analyse, choose Refresh All

Organisation ID#	Full organisation name	Gender	Age	Seniority	Ethnicity	Weighted score	Industry
1	ABC	0,56	0,33	0,33	0,33	0,41	Building
2	XYZ	0,50	0,19	0,25	0,19	0,30	Consulting
3	Test	0,50	0,25	0,25	0,63	0,47	Financial
(blank)	(blank)	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#N/A

The diversity ranking tab takes all of the data from the diversity scores tab. It removes the pivot table, thus allowing for the data to be sorted.

▶ Make a copy of the diversity ranking tab before sorting or filtering and paste to a separate sheet (either in this workbook or a new workbook). This will preserve the automation, in case you make changes to the data input tab later. Please find instructions Excel how-to guide.

See guide in Excel tool

▶ Remove the ”grand total” and ”blanks” rows before you conduct further data analysis.

A	B	C	D	E	F	G	H
Organisation ID#	Full organisation name	Gender	Age	Seniority	Ethnicity	Weighted score	Industry
1	ABC	0,56	0,33	0,33	0,33	0,41	Building
2	XYZ	0,50	0,19	0,25	0,19	0,30	Consulting
3	Test	0,50	0,25	0,25	0,63	0,47	Financial
(blank)	(blank)	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#N/A
Grand Total	0	0,50	0,08	0,17	0,20	0,28	#N/A

▶ On your new spreadsheet, you can sort the weighted score column from highest to lowest to obtain a diversity ranking showing the most diverse to least diverse.

Please contact the hotline if you experience errors

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