

# CHANGE IN STATUS SURVEY TOOLKIT



*Equity and Accessibility  
Management Services  
Division*

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# Change in Status Survey Campaigns

## Executive Summary

Diversity is an important part of today's workplace. There is growing significance placed on creating diverse environments that include considerations of race, ethnicity, age, gender, disabilities, and veteran status. Assurance of a workplace free of discrimination for all people is critical to the success of the State of California as a model employer for the people that it serves. Diversity is at the forefront of workplace culture cultivation as the state's population increases and becomes increasingly diverse.

The California Department of Human Resources (CalHR) collects specific federal and state demographic information of the state's workforce to measure fairness in employment opportunities and practices, and to make certain those opportunities are equitable for all employees. The data collected is analyzed to identify any non-job related barriers and to gauge the effectiveness of each department's efforts to recruit and retain a diverse workforce. CalHR collects the data and reports its findings to the Legislature annually.

Improving the data collection points and the collection methods the state uses to capture and report demographic data of its workforce is essential to obtaining accurate and relevant workforce data. Paramount to the success of data collection efforts is employee participation; however, reluctance to self-identify race/ethnicity, veteran, and disability statuses in fear of discrimination is a hurdle the state acknowledges and must overcome to achieve accurate data reporting.

Departments should make known to employees that any time they have a change in veteran or disability status, they are encouraged to update their status in the online survey system.

Setting forth a consistent and concerted effort brings credibility to the process and addresses employee reservations regarding confidentiality and disclosure. As such, the statewide annual survey campaign efforts have the following goals:

- 100% department participation.
- Improved annual data accuracy in overall workforce analysis reporting.
- Capture employee change in veteran and disability status from the previous survey period.
- Improved annual data accuracy to support departmental plans to correct significant disability, gender, race, and veteran underutilizations within identified occupational groups.
- Increased survey credibility and ease employee apprehension regarding the disclosure of sensitive information.

## Background

### **Veteran Status**

Prior to initiating the New Employee Survey policy and practice, veteran data for the state civil service was primarily collected when an employee was hired using the Veteran Preference Program. This has not allowed for identification of veterans who were ineligible for preference or who elected not to participate. The New Employee Survey, coupled with the Change in Veteran Status Survey, will allow employees, regardless of Veteran Preference participation, to be counted in the workforce data. This data will allow the state, and departments, to evaluate

and compare the results against the U.S. Census Bureau data<sup>1</sup> to measure efforts to recruit and retain veterans within the civil service workforce.

## **Disability Status**

Under Government Code §19233(b), CalHR requires departments to provide *all* employees the opportunity to self-identify any disabilities. In response to the 2015 Joint Project Recommendations to Increase the Employment of Persons with Disabilities in California State Government, CalHR reengineered the disability questions to collect data according to both the federal and state disability standards. Also, in accord with the recommendations, the New Employee Survey and the Change in Disability Status Survey allow employees to self-identify multiple disabilities.

Prior to initiating the Employee Demographic Data Collection policy and practice, CalHR observed that, while some departments conducted survey campaigns during disability awareness month, practices for deploying the disability survey were inconsistent among departments. The New Employee Survey, coupled with the Change in Disability Status Survey, will allow employees to be counted in the workforce consistently throughout the civil service workforce. The data collection helps departments identify whether they are meeting their recruitment goals for persons with disabilities and will provide for accurate data comparison against the federal data and population estimates.

## **Change in Status Survey Campaign**

The Change in Status Survey Toolkit was developed for departments to provide consistent timing and messaging through guidelines, resources, and tools to assist department Survey Coordinators with implementing their survey campaign efforts department-wide.

## **Survey Coordinator**

Equal Employment Opportunity (EEO) Officers are the most appropriate designated Survey Coordinator, since the surveys contain protected characteristics and employees are often reluctant to disclose this sensitive information to employers. The Survey Coordinator has these responsibilities:

- Serving as the central point of contact between CalHR and the department regarding the surveys and the annual survey campaigns.
- Serving as the central point of contact within the department regarding the surveys and annual survey campaigns.

## **Survey Ambassador or Influencer**

It is recommended to identify key influencers within the department who can serve as survey ambassadors who have the passion to influence and educate employees to participate in the survey.

A form of marketing in which focus is placed on specific key individuals that have influence to motivate other employees to participate, promote the importance of the surveys, and have a natural

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<sup>1</sup> **Veterans** are men and women who have served (even for a short time), but are not currently serving, on active duty in the U.S. Army, Navy, Air Force, Marine Corps, or the Coast Guard, or who served in the U.S. Merchant Marine during World War II. People who served in the National Guard or Reserves are classified as veterans only if they were ever called or ordered to active duty, not counting the 4-6 months for initial training or yearly summer camps. All other civilians are classified as nonveterans. For the complete definition, go to Census website and search "[Definition Veteran Status](#)."

ability to connect with all levels within their department. A survey ambassador may promote the surveys in the following ways:

- Conduct a ten-minute presentation at an all-staff meeting.
- Conduct a ten-minute presentation at various program staff meetings during the survey month.
- Be available to answer employee questions or concerns regarding the surveys.
- Personally follow-up with employees to convey the importance of surveys.
- Answer any questions or resolve any concerns: and,
- Prepare/send departmental email reminders.

## **Survey Team**

It is recommended that the department's EEO Officer take the lead in coordinating the survey efforts by developing a team that includes key ambassadors or influencers and representatives from the following areas:

- Equal Employment Opportunity/Civil Rights Program
- Communications
- Human Resources
- Disability Advisory Committee (DAC)
- Limited Examination and Appointment Program (LEAP)
- Workforce Development and Recruitment
- Diversity and Inclusion Program
- Veteran Outreach
- Health and Safety/Reasonable Accommodation Coordinator

## **Change in Status Survey Campaign Components**

### **Campaign Purpose**

The purpose of the Disability and Veteran Change in Status Survey Campaigns is to:

- Communicate the value of, and departments commitment to, fostering a diverse and inclusive workforce.
- Obtain from the state's civil service workforce veteran data that changed from the previous campaign period.
- Obtain from the state's civil service workforce disability that changed from the previous campaign period.
- Use the data as a benchmark to determine if hiring practices are fair, equitable, and diverse, and to gauge the success of efforts to recruit and retain a diverse workforce.

### **Campaign Benefits**

The Disability and Veteran Change in Status Survey Campaigns have the following benefits:

- Reinforce the department's commitment to a diverse and inclusive workforce.
- Provide another opportunity for those employees who were reluctant to participate in previous survey efforts.
- Encourage employees who have become veterans since the previous campaign was conducted to change their veteran status and be counted in the workforce.

- Encourage employees who have incurred a disability since the previous campaign was conducted to change their disability status and be counted in the workforce.

These benefits improve the accuracy and timeliness of civil service workforce data the State of California collects. Data collection is the first step in determining how successful the State of California is in recruiting and retaining a diverse workforce comprised of diverse cultures, veterans, and persons with disabilities.

### **Disability Survey Campaign Timing**

The Change in Disability Status Survey Campaign period is from October 1 through October 31 annually in consideration of October's National Disability Employment Awareness Month.

### **Veteran Survey Timing**

The Change in Veteran Status Survey Campaign period is from November 1 through November 30 annually in consideration of November 11, Veterans Day.

### **Top Management Commitment**

Visible top management commitment is regarded as having the most effective strategy for lowering participation apprehension and in turn, increasing overall participation. A consistent element to the success of campaign efforts is support from department directors and leaders. Leadership can support the campaign through the following commitment levels:

- Allow: Top management gives managers and staff permission to do what they believe is necessary for all employees to participate.
- Support: Top management provides some level of human resources to support a successful department-wide campaign.
- Make a good-faith effort: The department makes a sincere attempt to effectively conduct a department-wide campaign.
- Manage strategically: Departments formulate and implement a strategy for effectively implementing a department-wide campaign.

### **Communication Strategy**

#### **Internal Tactics**

To build credibility and ease employee apprehensions about disclosing sensitive disability and veteran status information, all departments are required to participate in the Annual Disability and Veteran Change in Status Campaign and attempt to use as many communication tactics as possible.

Communication regarding the Disability and Veteran Change in Status Survey Campaign requires an internal communications strategy that will engage employees by communicating the importance and benefits of updating survey responses to reflect status changes. Efforts to support this part of the strategy include the following:

- Web presence: A dedicated intranet webpage that can provide ongoing information about the disability and veteran surveys, provide the survey links, and FAQ document. Departments can also use the opportunity to recognize the diversity in your organization's workforce by featuring employee success stories and their job-related contribution to the mission of the department.

- Internal communication: Company newsletters, brochures, email blasts, and in-house videos can also be used to communicate the survey goals, benefits, and process, and to provide relevant information and resources.

## Executive Communication

In addition to the above-mentioned effort, top management can support the annual campaigns through these specific internal communication tactics:

- Department Director to all employees:
  - a. Expressing the commitment to a diverse and inclusive workforce.
  - b. Encourage all employee participation.
  - c. Explain the importance of requesting the employee's partial social security number and last name.
  - d. Explain the importance of the survey to gauge the department's workforce demographics at all levels of the department to help determine if the department is successful in recruiting and retaining a diverse workforce.
  - e. Emphasize that it is confidential and voluntary.
  - f. Reinforce the message that sensitive information will not be used in employment decisions; and,
  - g. Communicate that the information is collected by CalHR, not individual departments.
- Memo/Email/Discussions from Supervisors to Employees: Supervisors can encourage all employee participation and reinforce the importance of being counted in the workforce. In addition, managers and supervisors can make announcements during staff meetings during the survey month to encourage participation by all levels of employees.

## Articles in Employee Newsletters

An internal department newsletter can be an important tool to keep employees informed about activities, policies, initiatives, resources, and may be a useful tool to promote the department's annual change in status survey campaigns. Below are a few suggested article topics that can be used in conjunction with announcing the annual survey:

- Address any policy that supports diversity and inclusion.
- Feature employees throughout the department who reflect various forms of diversity: generational, ethnic, gender, disability, and veteran status. Highlight how their contributions make a difference in the department.
- Feature your department's disability representation data and trends over the last five years.
- Promote the department's commitment to employing veterans, persons with disabilities, and persons of various ethnicities.
- Introduce "People First" language which emphasizes the person, not the disability.
- Feature volunteer opportunities for employees to help veterans and community members with disabilities.

## Kick-Off Event

Departments may consider coordinating a thirty minute kick-off event that includes some of the following ideas:

- Promote the importance and benefits of the survey.
- Provide employees with the opportunity to ask questions in person.



- Provide a laptop or computer on-site for individuals who may not have access to a computer in their workspaces.
- Demonstrate how to access the survey and the time it takes to be completed.
- Allow ambassadors to connect with employees to educate them on the importance of data collection.
- Create a survey flyer and distribute it at the department's lobby during peak morning arrival times.

### Disability Advisory Committee (DAC)

The department's DAC members play an important role in the success of the campaign by helping to organize and create mini workshops, brown bag lunch seminars, and recruitment outreach to promote disability awareness in the workplace. They also have access to the department director regarding disability issues that employees face in the workplace and may serve as facilitators to encourage department leadership participation.

### Demographics

Research and educate yourself on your department's demographic composition: age, gender, ethnicity, veteran status, disability. Note any surprises you uncover.

### Did You Know? - Question of the Week

Departments may want to create *Did You Know* questions, via email or posts on their intranet, that can relate to various cultures/ethnicities, military service, and gender and generational topics.

Departments may offer a small prize, or bragging rights, and encourage employees to submit challenging questions from their own culture or generation.

### Awareness Survey Tactics

Using various tactics to bring insight to a particular topic through experiences and discussions will increase general awareness while providing the opportunity to integrate the survey benefits and discussions through related topics.

To build credibility and ease employee apprehensions about disclosing sensitive disability and veteran information all departments are required to participate at some level in the campaign efforts and attempt to use as many of the following tactics as possible.

### Annual Disability Awareness Efforts

During the month of October, the following pre-established awareness efforts may be used in conjunction with your department's campaign efforts.

- **National Disability Employment Awareness Month (NDEAM)**

To reflect the important role disability plays in workforce diversity, the U.S. Department of Labor leads the grassroots observances held nationwide each year. NDEAM is a nationwide campaign celebrating the skills and talents that workers with disabilities bring to our workplaces. Each spring, the theme for that year's celebration is announced to help organizations plan their events. Departments may develop events around the national theme to help promote and support the important contributions employees with disabilities make to the workforce.

## Annual Veteran Awareness Efforts

During the month of November, the following pre-established awareness efforts may be used in conjunction with your department's campaign efforts.

### **Veterans Day: November 11**

November 11 marks the official United States public holiday that honors military veterans, that is, persons who served in the United States Armed Forces. It coincides with other holidays, including Armistice Day and Remembrance Day, celebrated in other countries that mark the anniversary of the end of World War I. Major hostilities of World War I were formally ended at the 11<sup>th</sup> hour of the 11<sup>th</sup> day of the 11<sup>th</sup> month of 1918.

### **Marine Corps Birthday**

The United States Marine Corps Birthday is celebrated every year on November 10 dating back to 1775. The birth of the U.S. Marine Corps began as a way to augment naval forces in the Revolutionary War.

### **Military Family Month**

Each year the President signs a proclamation declaring November Military Family Month. This annual proclamation marks the beginning of a month-long celebration of the Military Family in which the Department of Defense and the nation honor the commitment and sacrifices made by the families of the nation's service members.

## Brown Bag Lunch Seminars

Brown Bag Lunch Seminars provide an opportunity to develop employees' knowledge and demonstrate the department's commitment to diversity and provides a venue to discuss and educate employees on the importance of participating in the annual survey. Below are topic ideas for Brown Bag Lunch Seminars:

### Guest Speakers and/or Topics:

- ❖ Veteran, Disability and Diversity Authors
- ❖ Veteran Associations
- ❖ Society for the Blind
- ❖ Demystifying Disability Biases and Assumptions
- ❖ Diversity and Inclusion
- ❖ Cultural Diversity
- ❖ Transgender Inclusion
- ❖ Café de California
- ❖ Asian Pacific State Employees Association (APSEA)

## Educational Survey Tactics

If departments have previously scheduled training sessions in the areas below, trainers may use this opportunity to educate employees on the importance of collecting the survey data, explain how the information is used, and encourage all employees to participate. See the attached FAQs.

### Cultural Diversity

Departments that have existing Cultural Diversity or Diversity and Inclusion programs in place could develop a mini training session that highlights these programs.

## Veteran Appreciation/Recruitment

Departments that have existing programs in place to recruit veterans in the workforce, or provide services to veterans, could develop a mini training session that provides a refresher course for these programs.

## Veteran Rights and Resources in the Workplace

This session may provide an opportunity to showcase veteran rights and services provided to employees by your department such as Reasonable Accommodations (RA), Employee Assistance Program (EAP), Protected Leaves, and EEO.

## People-First Language

Provide a training session educating the workforce about People-First Language which emphasizes the person, not the disability. By placing the person first, the disability is no longer the defining characteristic of an individual, but one of several aspects of the whole person. This session may discuss ways to eliminate stereotypes of people with disabilities.

## Drafting Duty Statements that are Inclusive and Accessible

Remind managers to review their existing duty statements annually to ensure they reflect the current duties, and to ensure descriptions that focus on desired outcomes rather than physical attributes needed to perform the essential functions (unless that is part of the essential functions). Duty statements must meet accessibility standards.

## Reasonable Accommodation Refresher for Managers and Supervisors

This mini session may discuss the department's RA policy and procedures; explain where RA information can be located; introduce the RA Coordinator; explain the roles and responsibilities of the RA Coordinator, supervisor and employee; and provide understanding of when RA is offered. It may also include anecdotal and statistical information such as the number of RA requests the department receives annually, the top five types of RA requests the department receives, and any related trends.

## Employee Disability Rights and Services in the Workplace

This session may provide an opportunity to showcase disability rights and services provided to employees by your department such as, RA, the DAC, EAP, Worker's Compensation, Protected Leaves, and EEO.

## Mitigating Computer and Internet Access Limitations

When department employees have computer or internet access barriers, departments should work with their management team and program area to explore mitigating options. The following examples may be considered:

- At each facility, program managers could establish a computer station accessible in a central location for employees who may not have access to a computer or internet during their work, i.e., janitors, correctional officers, nurses, and/or doctors.
- For institutions such as correctional facilities or hospitals where employees may have strictly controlled access to equipment, management could establish protocols to allow employees access to a computer during shift change or shift rotations.
- Departments may explore having an EEO Counselor, Campaign Ambassador, or a facility manager approach each employee during their assigned shift to request they complete the

quick online survey using a portable device such as an iPad, wireless laptop, or smartphone.

## **Resources**

### **Welcome Survey Page (links to all surveys)**

<https://eservices.calhr.ca.gov/Survey>

### **New Employee Survey Link**

<https://eservices.calhr.ca.gov/Survey/NewEmployee>

### **Change in Disability Status Survey Link**

<https://eservices.calhr.ca.gov/Survey/Disability>

### **Change in Veteran Status Survey Link**

<https://eservices.calhr.ca.gov/Survey/Veteran>

### **FAQ: Change in Disability Status Survey**

<https://www.calhr.ca.gov/Documents/ocr-faq-change-in-disability-status.pdf>

### **FAQ: Change in Veteran Status Survey**

<https://www.calhr.ca.gov/Documents/ocr-faq-change-in-veteran-status.pdf>

### **Sample Director Email/Memo: Disability Awareness Month**

<https://www.calhr.ca.gov/Documents/ocr-disability-status-email-template.docx>

### **Sample Director Email/Memo: Veteran Awareness Month**

<https://www.calhr.ca.gov/Documents/ocr-veteran-status-email-template.docx>

## **Contact Person**

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