Community Survey and Reporting Framework
## Version Control

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Primary Editor</th>
<th>Organization</th>
<th>Contact Info</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>08/04/2017</td>
<td>Stephanie Little</td>
<td>Hubba</td>
<td><a href="mailto:slittle@hubba.com">slittle@hubba.com</a></td>
<td>Initial Public Draft</td>
</tr>
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</table>
## Participating Organizations

<table>
<thead>
<tr>
<th>Organization</th>
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<th>Join Date</th>
<th>Primary Point Of Contact</th>
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Contents

- Why run a demographics survey
- Who to include in your survey
- What to ask
- Asking sensitive questions sensitively
- Collecting your responses
- Analyzing and presenting your results
- Full framework
Diversity Matters

- Diverse groups out-perform homogenous teams and should have proper representation in the workplace.

- Diversity goes beyond the surface level information many companies currently consider. It is also worth noting that People are diverse in many ways they may not officially disclose.

- A voluntary and anonymous survey will provide insight into how diverse your organization is, without putting anyone in an uncomfortable position.
Your Survey Results Will Help

• Identify areas where your company and teams are over or under represented

• Align policies to better serve your teams

• Communicate and showcase your personality and culture to applicants

• Tailor your Diversity & Inclusion efforts (communications, training, education, etc)
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Employees

• From part-time to remote to executive team members, all employees should be included in survey for results that are truly representative of the company.

• Temporary employees, co-ops, interns etc. could potentially skew your data. In these cases, consider whether the role(s) are one-off short term positions (don’t include) or if the role(s) will be consistently filled, like a co-op position or a longer term temp assignment (do include)
Independent Contractors / Freelancers / Outsourced teams?

• As they are not official employees, are not making or informing decisions that impact the business and team, and typically have little to no interaction with your team, it is recommended they should not be included.
Board Members and Investors

• With their direct impact on business and company direction, board members and investors are an important group to include in your diversity survey.

• Considering this group is not part of the employee base, a separate and/or less detailed survey may be more appropriate for this smaller group.
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Standard Demographics

• Standard demographic questions should be included in all surveys and represent the areas of most frequent discrimination and bias.

• These include questions of age, gender, religion, nationality, race, ethnicity, disability, family and marital status, education and socio-economic background.

• The results of these questions will help identify the first layer of gaps that exist at your company.
General Interest

• General interest questions are optional but provide the information that will illustrate the personality of your organization. The results of these questions provide insight into the nuanced areas of diversity, those that illustrate your workforce’s point of reference, add colour to your company’s foundation and can uncover where varying viewpoints come from (or those that are over indexing).
This standard information that is usually already captured and on file through other avenues, becomes richer when you are able to analyze it with more detailed demographic data through your survey. For example:

<table>
<thead>
<tr>
<th>Standard info on file</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total # of employees</td>
<td>60</td>
</tr>
<tr>
<td># female</td>
<td>30</td>
</tr>
<tr>
<td># male</td>
<td>30</td>
</tr>
<tr>
<td>ABC Co celebrates reaching 50% female headcount.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Survey Data</th>
<th>M</th>
<th>F</th>
<th>O</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender identity</td>
<td>50%</td>
<td>48%</td>
<td>2%</td>
</tr>
<tr>
<td>Leadership roles</td>
<td>85%</td>
<td>15%</td>
<td>0%</td>
</tr>
<tr>
<td>Earning above $X</td>
<td>90%</td>
<td>8%</td>
<td>2%</td>
</tr>
<tr>
<td>Engineers</td>
<td>80%</td>
<td>18%</td>
<td>2%</td>
</tr>
</tbody>
</table>

ABC Co investigates who/what has created these imbalances and how they can rectify.

*example is very simplified. You would likely analyze a lot deeper than this.
Engagement

• Where standard questions can offer insight into foundational diversity, engagement questions provide important awareness/understanding of the mood of your teams and can help guide areas of focus and prioritization as you continue to improve the organization.

• Results should influence you to look at whether diverse groups feel less engaged and whether those trends are company wide or isolated to specific department, and if credit or promotions are skewed in any particular way.
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Sample Surveys

• Sample surveys have historically been over simplified and generic to a fault.

• The framework provided at the end of this guide has been drafted/constructed with an “employee first” mentality, designed specifically with employee empathy, consideration and respect.

• This survey began with Project Include to create the demographic framework and Culture Amp for engagement, expanded to be modular, and adapted to better suit Canadian organizations. This adaptation also includes additional topics that could be of interest to select organizations.
More Options to Select From

• The value of listing more options is richer data and a better understanding of your employee base so you can grow your teams in meaningful, diverse and inclusive ways.

• In a category with near endless options such as language or religion, adding 10-25 options and including an “other” option is usually fine.
The “OTHER” Option

• Even the most thoughtful and inclusive surveys will require an “OTHER” option. There is always a chance that a possible option has not been included.

• The value of “OTHER” increases and is more respectful when it is more than a check-box or radio button - be sure to include a text box and offer employees an option to expand and explain if they choose. This creates an opportunity for any missed groups to self-identify, and improve future surveys and the organization.
Simple & Clear

- Keep all survey options clear and simple. It is important to ensure questions are not leading or derogatory even if unintentional. It is worth noting that too much detail can also hinder an employee’s ability to respond if they don’t identify an option that fits.

<table>
<thead>
<tr>
<th>Instead of this ....</th>
<th>Consider this ....</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you consider yourself religious?</td>
<td>Do you consider yourself Religious?</td>
</tr>
<tr>
<td>• Yes, very. It's a factor in my daily life and I follow all or most of the rules and rituals</td>
<td>• Yes</td>
</tr>
<tr>
<td>• Yes, somewhat. It means a lot to me but I don’t follow all of the rules and rituals</td>
<td>• Somewhat</td>
</tr>
<tr>
<td>• Sort of - It’s not a factor in my daily life but I do honour the main holidays of my religion and special occasions/ceremonies</td>
<td>• Faith - not religious</td>
</tr>
<tr>
<td>• Not any more</td>
<td>• Spiritual - not religious</td>
</tr>
<tr>
<td>• No</td>
<td>• Not any more</td>
</tr>
<tr>
<td>• Other (please specify)</td>
<td>• No</td>
</tr>
<tr>
<td></td>
<td>• Other (please specify)</td>
</tr>
</tbody>
</table>
Context for Clarity

• Context or definition at the beginning of a question can help ensure that all areas of the survey are properly interpreted and your data is more accurate.

• For example, “Do you have a vision disability? (ie. not corrected by use of prescription lenses)”
Reviews & Feedback

- Consider having your survey reviewed by a Diversity & inclusion or Human Rights Professional or lawyer if its an option for your organization.

- For best results, get feedback from employees who completed the survey.

- Include open-ended questions that offer opportunity for employees to offer suggestions for improvement, highlight if anything was insensitive, ask for clarification, or even give kudos.
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Anonymity

• Anonymity matters in ensuring the validity of responses, and true representation of your employees.

• Removing the requirement for participants’ name and email and masking their IP address is a good start but does not provide the level of privacy needed to encourage participation and honest responses.
Anonymity (continued)

• The potential for identification issues can arise when cross referencing data from your standard demographics with departmental and engagement questions. If your departments are small, it is recommended that you combine departments to eliminate the potential of accidentally identifying individual employees.

• For example, if you only have one female engineer, you’ll be able to identify details about 100% of your female engineers unless departments are combined.

• To maintain anonymity, enlist the help of an independent third party.
Independent Third Party Support

• If you have budget, there are third party firms that have out of the box or customizable options; they will collect responses on your behalf and return survey results in aggregate if you choose.

• SurveyMonkey or Google Forms provide budget-friendly alternative tools you can use along with credible, trustworthy and professional third party willing to export your summary data.

• When choosing your third party, if your budget allows, consider working with a Diversity & Inclusion / Human Rights Professional who can review your questions for any red flags.
Managing Responses

• Survey participation should be voluntary. Decide on minimum requirement for workforce participation and completion. The higher the percentage participation of your employee base, the more accurate and reflective of your organization the data is.

• Check your settings that employees can only submit survey responses once.

• 2-3 days is the recommended time to keep survey open for employees to complete, but feel free to extend timeline and send reminders as you see fit.

• If using a third party, request daily updates on responses to your survey response numbers.
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Anonymity Again

- Protecting anonymity is especially important when sharing the results. Getting granular and specific with your questions gives you very rich and specific data that helps you understand your organization and prioritize your diversity and inclusion efforts based on results – but this level of information is not necessarily safe to share.

- Take great care to study your stats before sharing and consider grouping information together to present in ways to eliminate risk of breaching employee’s privacy.
Presenting

- Select important and interesting findings and present them in general terms. For example:

<table>
<thead>
<tr>
<th>Total # of Employees</th>
<th>80</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Person(s) with Disability</strong></td>
<td><strong># Yes</strong></td>
</tr>
<tr>
<td>Disability</td>
<td>#</td>
</tr>
<tr>
<td>Physical/Medical</td>
<td>1</td>
</tr>
<tr>
<td>Vision/Hearing</td>
<td>1</td>
</tr>
<tr>
<td>Mental/Addiction</td>
<td>3</td>
</tr>
<tr>
<td>Cognitive/ Learning</td>
<td>2</td>
</tr>
</tbody>
</table>

= 9% of employees identify as having a disability
Sharing with Employees

• Share your (privacy filtered) information and your findings with your employees. They are interested in the breakdown of your organization, and this information should encourage participation in your future surveys.

• Transparency is appreciated. Acknowledge areas you think you can do better in, and what you plan to do to get there. Give them the opportunity to make suggestions, anonymously or not.
Repeating the Survey

• Every 6 months is recommended. Too often and your anonymity may be compromised and your participation will dwindle.

• Use the same questions for your repeat survey you used with the last survey – with improvements or modifications based on feedback – so that you can measure your progress more accurately.
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Work
Department / Level / Compensation

Employee Type
- Permanent, Full Time
- Permanent, Part Time
- Co-op / Intern
- Temporary (6mo+ contract), Full time
- Temporary (6mo+ contract), Part Time
- Other (specify)
Department / Level / Compensation

Department
  Engineering
  Product Management
  Marketing
  Sales
  Customer Success
  Business Development
  Operations
  People
  Finance
  Administration
  Other (specify)
Level

- Co-op/Intern
- Employee/Individual Contributor
- Supervisor
- Manager/Team Lead
- Department Lead/Director
- Executive
Compensation

- Annual salary (specify)
- Bonus potential (specify __%)
- Date of last salary increase (specify, enter N/A if you are under [X] months tenure)
- % of bonus potential awarded last review (specify, enter N/A if you are under [X] months tenure)
Engagement

I would recommend [COMPANY] as a great place to work
Strongly Agree
Agree
Neutral
Disagree
Strongly Disagree
Comment:

[COMPANY] motivates me to push beyond what I would in a similar role elsewhere
Strongly Agree
Agree
Neutral
Disagree
Strongly Disagree
Comment:
Engagement

I see myself still working at [COMPANY] in two years’ time
   Strongly Agree
   Agree
   Neutral
   Disagree
   Strongly Disagree
Comment:

The leaders at [COMPANY] demonstrate that people are important to the company’s success
   Strongly Agree
   Agree
   Neutral
   Disagree
   Strongly Disagree
Comment:
Engagement

I have confidence in the leaders at [COMPANY]
Strongly Agree
Agree
Neutral
Disagree
Strongly Disagree
Comment:

I feel I am part of a team
Strongly Agree
Agree
Neutral
Disagree
Strongly Disagree
Comment:
Engagement

The information I need to do my job effectively is readily available
Strongly Agree
Agree
Neutral
Disagree
Strongly Disagree
Comment:

I am appropriately involved in decisions that affect my work
Strongly Agree
Agree
Neutral
Disagree
Strongly Disagree
Comment:
Engagement

We have enough autonomy to perform our jobs effectively
  Strongly Agree
  Agree
  Neutral
  Disagree
  Strongly Disagree
  Comment:

Workloads are divided fairly among people where I work
  Strongly Agree
  Agree
  Neutral
  Disagree
  Strongly Disagree
  Comment:
Engagement

Other departments at [COMPANY] collaborate well with us to get the job done

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree

Comment:

My manager keeps me informed about what is happening

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree

Comment:
Engagement

My manager gives me useful feedback on how well I am performing

   Strongly Agree
   Agree
   Neutral
   Disagree
   Strongly Disagree
Comment:

My manager (or someone in management) has shown a genuine interest in my career aspirations

   Strongly Agree
   Agree
   Neutral
   Disagree
   Strongly Disagree
Comment:
Engagement

I believe there are good career opportunities for me at [COMPANY]
   Strongly Agree
   Agree
   Neutral
   Disagree
   Strongly Disagree
Comment:

I receive appropriate recognition for good work at [COMPANY]
   Strongly Agree
   Agree
   Neutral
   Disagree
   Strongly Disagree
Comment:
Engagement

Generally, the right people are rewarded and recognized at [COMPANY]

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree

Comment:
Demographics
What is your age bracket?
Under 21
21-25
26-30
31-35
36-40
41-45
51-55
56-60
61-65
Over 65
Race & Ethnicity

Were you born in Canada?
  Yes
  No
If no, please specify the country you were born in

Were your biological parents born in Canada?
  Yes, one
  Yes, both
  No
  Unsure

How many of your biological grandparents were born in Canada?
  0
  1
  2
  3
  4
  Unsure
Race & Ethnicity

What is your first language?

Arabic
Bengali
Bulgarian
Cantonese
Croatian
English
Farsi
French
German
Hebrew
Hindi
Italian
Japanese
Mandarin
Polish
Portuguese
Punjabi
Russian
Spanish
Tagalog
Urdu
Other (please specify)
Race & Ethnicity

What languages (apart from your first language) are you fluent in? (Check all that apply)

Arabic  Italian
Bengali  Japanese
Bulgarian  Mandarin
Cantonese  Polish
Croatian  Portuguese
English  Punjabi
Farsi  Russian
French  Spanish
German  Tagalog
Hebrew  Urdu
Hindi  Other (please specify)
Race & Ethnicity

Which of the following ethnicities do you identify as? (Check all that apply)

Canadian
American
Australian
Caribbean / West Indian
Central American
Central or South African
East African
East Asian (including Japanese & Chinese)
Eastern European
Middle Eastern
Nordic

North African
Northern European
Pacific Islander
(including Hawaii & New Zealand)
South American
South Asian
South East Asian
Southern European
West African
West Asian
Western European
Other (please specify)
Race & Ethnicity

Do you identify as being Indigenous to any geographical area? For the purposes of this survey, Indigenous refers to whether your ethnicity is of people that originally populated the land vs European settlers.
  Yes
  No
  If yes, please specify

Do you identify, or have you identified, as being a Person of Colour?
  Yes
  No
  Other comment
Gender & Sexuality

What is your gender identity?
  Agender
  Bigender / Two Spirit
  Gender fluid
  Female (cisgender)
  Male (cisgender)
  Questioning
  Stealth
  Third gender
  Transgender
  Transsexual
  Other (please specify)
Gender & Sexuality

How do you identify sexually?
Asexual
Bisexual
Fluid
Gay
Heterosexual / Straight
Pansexual
Questioning
Other (please specify)
Gender & Sexuality

If you identify as a member of the LGBTQ+ community, are you out?
Yes
No
Partially
N/A
Other (please specify)
Relationships & Family Status

What is your relationship status?
  Single
  In a relationship
  Married or common law
  Divorced
  Separated
  Widowed
  Other (please specify)
Relationships & Family Status

Which of the following describe your relationship(s)?
Conventional / Monogamous
Open
Polyamorous / Polyfidelitous
N/A
Other (please specify)
Do you have people depending on you for care? (check all that apply)
   Child(ren) – full time/daily
   Child(ren) – part time/several times per week
   Person(s) with disability (incl. child or elderly) – full time/daily
   Person(s) with disability (incl. child or elderly) – part time/several times per week
   Elderly person(s) – full time/daily
   Elderly person(s) – part time/several times per week
   Other (please specify)
Religion

Do you consider yourself religious?
- Yes
- Somewhat
- Have Faith - not religious
- Spiritual - not religious
- Not any more
- No
- Other (please specify)
Religion

What is your religion, if any?
   No religion
   Bahá’í
   Buddhist
   Catholic
   Hindu
   Jainist
   Jehovah's Witness
   Jewish
   Muslim
   Other Christian
   Sikh
   Other (please specify)
Do you identify as a person with a disability?

For the purpose of this survey, we are defining a disability as a physical, medical, mental, addictive, cognitive, learning, vision, verbal or hearing condition that significantly impacts your life.

A disability may have been present at birth, caused by an accident, or developed over time. Disabilities can be permanent, temporary, or occasional.

Yes
No
Disability

Do you identify as having a physical or medical disability?
  Yes – with a significant impact on day to day life (please specify)
  Yes – little impact on day to day life (please specify)
  Sometimes (please specify)
  No
Disability

Do you identify as having a vision disability (not corrected by use of prescription lenses)?
   Yes – with a significant impact on day to day life (please specify)
   Yes – little impact on day to day life (please specify)
   Sometimes (please specify)
   No
Disability

Do you identify as having a hearing disability?
   Yes – with a significant impact on day to day life (please specify)
   Yes – little impact on day to day life (please specify)
   Sometimes (please specify)
   No
Disability

Do you identify as having a mental disability?
   Yes – with a significant impact on day to day life (please specify)
   Yes – little impact on day to day life (please specify)
   Sometimes (please specify)
   No
Disability

Do you identify as having an addiction?
    Yes – with a significant impact on day to day life (please specify)
    Yes – little impact on day to day life (please specify)
    Sometimes (ie. under control but could/sometimes relapse) (please specify)
    No
Disability

Do you identify as having a cognitive or learning disability?
Yes – with a significant impact on day to day life (please specify)
Yes – little impact on day to day life (please specify)
No
Socio-economic Situation

What is your socio-economic situation?
  Poor
  Tight
  Comfortable
  Well off
  Wealthy
  Unsure
  Prefer not to answer
  Other (please specify)
Socio-economic Situation

Growing up, what was your socio-economic situation?
- Poor
- Tight
- Comfortable
- Well off
- Wealthy
- Unsure
- Prefer not to answer
- Other (please specify)
Education

What is your highest level of education?
- Did not go to/finish high school
- High school degree or equivalent
- Diploma(s)
- Some college, no degree
- College degree
- Associate degree
- Some university, no degree
- Bachelor's degree
- Master's degree
- Professional degree/designation
- PhD
- Other (please specify)
Education

How did your education play a part in getting your job?
Directly
Indirectly
Not at all
N/A
Other (please specify)
How do you contribute to causes that are important to you? (Check all that apply)

- Volunteer
- Donate
- Sit on a board
- Set up a charity
- Fundraise/Collections
- Study
- Raise awareness
- N/A
- Other (please specify)
Have you ever run a business? (Check all that apply)
- Founded (or co-founded) and ran my own business
- Founded (or co-founded) a business that was run by others
- Ran someone else’s business
- No
- No, but I hope to in the future
General Interest

Do you study (including self learning) or work part time on anything outside of your job? (Check all that apply)
- I have a hobby job / side hustle
- Study related to current job/company
- Study related to career in general
- Study for pure interest
- No
- Other (please specify)
General Interest

Are you doing what you thought you’d be doing when you grew up?
  Yes
  Close
  No
  Still don’t know
  Other (specify)
Is there anything that you do (or have done) at a competitive level?

Sports
Video gaming
Crafts
Animal show
Writing
Eating
Gardening
Strategy board games
Music / singing
Dancing / gymnastics
Festivals
No
Other (specify)
General Interest

Are you tattooed?
   Yes, visible
   Yes, hidden
   No, but open / planning
   No
   No, and never will
General Interest

Do you read your horoscope?
  Yes
  Occasionally
  No
General Interest

What things do you consider seriously when purchasing something? (check all that apply)
- Ingredients
- Handmade or Locally made
- Locally bought
- Positive reviews
- Price / sale
- Durability
- Available for online order
- Speed of delivery/availability
- New or exciting product
- Environmental impact
- Other (please specify)
General Interest

Do you follow a particular diet? (include for religious or ethical reasons)
   No
   Sometimes
   Yes (please specify)
General Interest

Coffee or tea?
  Coffee
  Tea
  Both
  Neither
General Interest

Do you exercise?
   Yes
   Sometimes
   No
   Other (comment)

How do you exercise? (check all that apply)
   N/A
   Regular work out schedule
   Fitness classes
   Organized sports
   Active day to day life
   Other (please specify)
General Interest

Do you meditate?
  Yes – daily/often
  Yes – sometimes
  No, but I am interested
  No
  Other (comment)
General Interest

How many hours sleep do you typically get a night?
less than 3
3
4
5
6
7
8
more than 8
General Interest

Do you have any phobias?
   No
   Yes (please specify)
General Interest

What’s your usual way of getting to work?
  Walk
  Cycle
  Public transit
  Drive
  Other or combination (specify)
What vehicles are you licensed to operate?
None / none yet
Car / small vehicle
Motorcycle
Heavy vehicle / truck / tractor trailer
Bus / school bus
Emergency vehicle
Motor boat
Plane
Helicopter
Other (please specify)
General Interest

Do you write with your ...
  Left hand
  Right hand
  Both
  Neither
  Other
General Interest

What kind of setting did you grow up in?
- Small town / rural
- Large town / city / urban
- Suburban
- Other or combination (please specify)
General Interest

Do you have a pet/pets?
  Yes
  Sort of (eg. pet(s) belong to parents/significant other/ roommate)
  No, but I want to
  No

What pet(s) do you have? (Check all that apply)
  Cat(s)
  Dog(s)
  Fish
  Rodent(s)
  Bird(s)
  Other (specify)
General Interest

Do you practice an art or craft? (doesn't matter if you are accomplished or not)

Musical instrument / singing
Writing / poetry
Painting / drawing
Photography / film
Sewing / other textiles
Wood / metal crafts
Pottery / glass
Sculpting
Paper crafts
Magic
No
Other (please specify)
General Interest

How many hours a week do you typically spend video gaming?
0
1-10
11-20
21-30
31-40
40+
General Interest

How many books (fiction or non) do you think you read in a year?
0
1-5
6-12
13-20
More than 20
None but I read a lot online
Other (comment)
General Interest

What kind of vacationer are you? (check all that apply)
Staycationer
Cottager
City explorer
Resorter
Adventurer
Camper
Other (specify)
General Interest

How many countries have you visited outside of Canada? (not including airport layovers)

- 0
- 1-5
- 6-10
- 11-15
- 16-20
- More than 20
Feedback
Your Feedback

Do you have any suggestions on how we could improve this survey for next time? Were there things you found confusing? Were there things you felt were missing? Were there things you found offensive or insensitive?

Comment:
Your Feedback

Are there any topics around diversity & inclusion that you would like [COMPANY] to put together education or learning resources on?
Comment:
Your Feedback

Any other comments?
Comment: