



# Collecting employee self-identification data

Guidance and tools  
for conducting  
self-identification  
campaigns



Employment and  
Social Development Canada

Emploi et  
Développement social Canada

Canada

**Collecting employee self-identification data: Guidance and tools for conducting self-identification campaigns**

Large print, braille, MP3 (audio), e-text and DAISY formats are available on demand by [ordering online](#) or calling 1 800 O-Canada (1-800-622-6232). If you use a teletypewriter (TTY), call 1-800-926-9105.

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PDF

Cat. No.: Em8-103/2025E-PDF

ISBN: 978-0-660-79579-9

# 01 Introduction

This guide is designed to help Canadian employers collect accurate self-identification information from their employees to support employment equity. This includes information about employees' status as Indigenous peoples<sup>1</sup>, persons with disabilities or members of visible minorities. Good data is critical to creating a more equitable, inclusive, and productive workplace.

We know that collecting this data can be a sensitive, tricky task. To help you, this guide gives you step-by-step instructions and resources, based on the best available evidence, for running a campaign to improve your company's self-identification data. It focuses on employee communications templates and talking points.

This campaign provides a place to start, but all of the materials can be customized or adapted to better suit the organizational context.

## What is Employment Equity

**Note:** Employment equity aims to achieve equality in the workplace, ensuring that no one is denied employment opportunities or benefits for reasons unrelated to ability. It seeks to address conditions of systemic disadvantage in employment for 4 designated groups: women, Indigenous peoples, persons with disabilities, and members of visible minorities.

Employment equity is more than treating people identically – it requires measures to eliminate employment barriers, correct underrepresentation, as well as to accommodate diverse needs. To address employment inequities, we must first understand who makes up an organization's workforce.

There are 2 related sets of federal employment equity requirements: one under the *Employment Equity Act* (EEA) and one under the Federal Contractors Program (FCP). Under these federal employment equity requirements, employers must rely on voluntary self-identification to determine the representation of Indigenous peoples, persons with disabilities and members of visible minorities in their workforce. This data helps organizations assess the diversity of their workforce and design strategies to eliminate employment barriers and address gaps in representation, including by the provision of accommodations to support employees.

<sup>1</sup> Unless the context requires the use of the term Aboriginal peoples as it appears in the *Employment Equity Act* or as part of a proper name, the Labour Program uses the term Indigenous peoples.

# 02 Self-ID Campaign-in-a-Box

## Before the campaign

Start planning the campaign about 4 weeks before you plan to launch it. Use the following checklist as a guide.

- Download and read this guide**
- Develop templates and tools**
- Confirm the survey functions correctly if using an online form**
  - E.g., all fields are appearing and responses are saving correctly in the back-end
- Designate a main contact (person or team) for the campaign**
  - This person (or team) will send most, if not all, communications, collect responses, and field employee questions
- Notify supervisors / managers that the self-ID campaign will be launching and explain their roles and responsibilities**
- Add a prompt or reminder to complete the survey to a task that employees already need to complete daily or weekly, like timesheets or other reports**
  - E.g., if you have a portal where employees submit leave requests, expense reports, or enter their overtime, add a link to the survey or a pop-up reminder
  - Tip: Get an early start! Ensure you have enough time to set-up and test the reminders in advance
- Consider recruiting “champions” - employees who are interested in promoting the self-ID campaign to their co-workers**
  - Supervisors or managers could solicit volunteers ahead of time after introducing the campaign, approaching groups involved with advocacy or Diversity, Equity and Inclusion (DEI) within the organization, or reaching out to employees who promptly completed the self-ID questionnaire
  - It is imperative that participation is completely voluntary and employees do not feel pressured to participate
- Identify (real) stories to illustrate how self-ID data has been used to understand and improve your workplace**
  - People love stories! Case studies and real-life examples can create buy-in and help employees understand why their participation is important. These can be useful when introducing the campaign, in outreach materials, and/or as talking points for employee champions

# Campaign

## Week prior to launch

If you have employee champion(s), reach out to them to provide:

- information on their role as champions (i.e., to promote the self-ID campaign among their peers, answering questions and providing information to peers, and flagging any concerns or issues to the campaign point person to troubleshoot)
- detailed information about the campaign and any other information needed to answer common questions
- instructions on when and how to bring concerns about the campaign to management (i.e., who they should follow up with and for what types of issues)

## Week 1, day 1

Send a company-wide communication noting that you will be asking for updated demographic information from employees. Explain the purpose and address privacy concerns. A template for this communication is provided below. In general, the communication should come from the HR Director or a member of senior leadership. This person may or may not be the main contact for the campaign; if not, leadership should introduce the main contact for the campaign and cue employees to watch for emails from this individual.

### Email template: updated demographic information

**Subject:** Help us create a more equitable workplace

Hello [Employee name],

As part of our ongoing commitment to employment equity, we are conducting a survey to better understand our workforce. Your participation will help us improve equality in our workplace.

#### Why are we collecting the information

- To gain insights that help us improve our employment equity initiatives
- To ensure compliance with legal requirements, including reporting workforce statistics to the federal government

You will receive an email from [contact] with a secure link to a 5-minute survey. Your responses will be confidential and will not negatively affect your employment.

We appreciate your time and contribution to making our workplace more equitable and supportive for everyone.

Best regards,

[HR director/ Member of senior leadership]

[Title and contact information]

## Week 1, day 2

Send every employee an email with a link to the questionnaire. The email should come from the main contact and should concisely request the employee complete the survey, reiterating some of the key points around purpose and privacy. If your workplace does not regularly use email, drop this note off and paper copies of the survey at each worksite or a central location where most employees will be present.

### Email template: first email with questionnaire

**Subject:** Complete our short workforce survey

Hi [Employee first name],

**We are collecting information about our workforce to support our employment equity goals.**

This will help us identify areas for improvement, provide workplace accommodations, and address the needs of all our employees.

We will also be reporting our workforce information to Employment and Social Development Canada as part of our employment equity requirements. Information from our reports will then be published on Equi'Vision.<sup>2</sup>

Your personal information will be confidential within our organization and only used for employment equity purposes. We will report statistics for our workforce after the data has been de-identified - this means that employees will not be identified in the data that we provide. No personal information will be published on Equi'Vision.<sup>3</sup>

**Complete our [workforce survey – add URL].**

If you have any questions, email or call XXX-XXXX (ext. XX) to reach [name].

Thank you,

[Name]

[HR Director/ Main contact title]

<sup>2</sup> This only applies if submitted under the *Employment Equity Act*. Employers with the Federal Contractors Program should omit this line.

<sup>3</sup> This only applies if submitted under the *Employment Equity Act*. Employers with the Federal Contractors Program should omit this line.

## Designing your own communications

**Note:** The suggested templates are not mandatory but may be a helping starting point for adapting or developing your own communications. If you are designing your own communications, we recommend using the following principles:

- Be concise and use plain language
- Personalize the communications using employees' names and including the sender's name and contact information
- Provide key assurances around privacy and workplace protections when collecting personal information
- Have a clear "call to action": make it easy for employees to understand what to do

## Helping employees identify with designated groups

**Note:** Clear information and plain language definitions can help employees understand and complete self-identification (self-ID) accurately.

For example:

A disability is a long-term difficulty, lasting 6 months or more, that makes daily activities harder. You can identify as a person with disability if you have:

- difficulty seeing, even with glasses or contacts
- difficulty hearing, even with a hearing aid
- difficulty walking, using stairs, or using your hands or fingers
- difficulty learning, remembering, or concentrating
- mental health challenges or emotional difficulties

## Week 1, day 2

If you have planned for automated prompts or reminders (e.g., on timesheets or reports), ensure these are live and conduct a final test of the system. Maintain these prompts for the remainder of the campaign.

If your employees use calendar software and are primarily desk-based, book 5-15 minutes in their calendar to complete the survey.

## End of week 1

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Get response rate data and update your strategy accordingly. While the goal is to get 100% completion, you should aim for an 80% rate at least.

How you update your strategy will depend on why employees are not completing the survey. Speak with champions, managers, and other individuals to understand why employees have not completed the survey, and tailor your approach to address these concerns. For example:

- if employees have concerns about privacy or how their data will be used, consider addressing specific concerns via in-person outreach (e.g., speaking at a team meeting) or leveraging champions
- if employees are not completing the survey because they are busy or have competing priorities
  - » consider ways to make it easier for them to complete the survey, such as providing multiple ways to fill it out, reducing associated administrative tasks, or designating a specific time for employees to complete the survey (e.g., in calendars or holding time at the end of a meeting)
  - » emphasize that the survey is simple and short in outreach communications.
- if employees intend to complete the survey but forget to do so, ask managers and leaders to remind their teams (e.g., at the outset of meetings), provide designated time for employees to do this, and consider additional reminders

### **Our employees do not work in an office or central location, how can I encourage them to complete the survey**

**Note:** The strategies you use will vary depending on the specifics of your workplace. Some potential ways to reach employees that are not office-based could include:

- **Leverage any regular touchpoints** that they have with the organization and basing campaign activities around these. For example, if employees work in the field, consider distributing the surveys in pre-departure paperwork or planning the campaign for when (most) employees will not be on assignment
- **Consider alternative channels for distribution**, such as promoting the campaign via text message or on other platforms used by employees
- **Provide a mobile-friendly version of the survey** that employees can complete remotely via telephone. If employees will also have limited access to the internet, consider alternative ways that they can complete the survey (e.g., dialing a number and pressing buttons to answer questions)

## Week 2, days 1 to 3

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Ask supervisors to remind their employees about the survey. Provide supervisors with the following speaking points to address common concerns around self-ID disclosures:

### Speaking points to address concerns about the survey

#### What is this survey and why is the organization collecting this information

- As part of our employment equity efforts, we are collecting data to better understand workforce diversity, focusing on 4 designated groups under the *Employment Equity Act* and the Federal Contractors Program: women, Aboriginal peoples, persons with disabilities, and members of visible minorities

#### How will my responses be used by the organization

- All responses will be kept confidential within the organization. We will use this information only to meet our employment equity obligations, such as to understand our workforce, identify and inform our equity goals and initiatives, and to provide accommodations.
- Participation will not negatively impact training, promotions, or retention

#### How will the data be used for reporting

- Part of our responsibility as a federally regulated employer or contractor with the federal government is to collect and report on the diversity of our workforce.
- Your responses will be de-identified and reported with other employees' data to the Government of Canada, as part of our employment equity obligations. The Government of Canada then publishes aggregated information based on employer reports on Equi'Vision (\*only if submitted under the *Employment Equity Act*). No personal information is published on Equi'Vision. Data protection follows our Privacy Notice guidelines

If you have recruited employee champions, send an email prompting them to talk about the survey with their co-workers. Champions should be provided with similar speaking points to address common concerns.

## End of week 2

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Review the completion data. If you are not yet at your target response rate, consider additional channels and touchpoints for employee outreach, such as promoting the survey during meetings, encouraging managers and champions to speak with colleagues. You may also consider scheduling meetings with key individuals and groups, such as Employee Resource Groups or DEI committees, to understand employee concerns and update your strategy accordingly.

## Week 3, day 1

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Send a reminder email and/or leave a reminder notice (email template below).

Consider the use of a social norms statement, which highlights other people performing the behaviour you'd like to encourage - in this case, people completing the self-ID survey. For example, using a statement like, "78% of our colleagues are invested in making our workplace better for everyone. Join them by taking a few minutes to complete this short survey" in place of the bolded text in the template below. Social norms statements have been successful in influencing behaviour in many areas. However, be careful to only highlight positive social norms (i.e., where most or many people have done the behaviour), as pointing out how many people have **not** done something may inadvertently discourage people from the behaviour.

### Email template: second email with questionnaire

**Subject:** Take 5 minutes to complete our workforce survey

Hi [Employee first name],

In case you missed it, we are collecting information about our workforce to support our employment equity goals and create an environment where everyone is welcome.

**Complete our [workforce survey – add URL].**

All responses will be kept confidential within the organization and only used to meet our employment equity obligations.

If you have any questions, email or call XXX-XXXX (ext. XX) to reach [name].

Thank you,

[Name]

[HR Director/ Main contact title]

The reminder template is designed to be concise, so it provides a minimal amount of information. Important information should be included in the questionnaire so employees understand the purpose of the data collection and how their information will be used.

## End of Week 3

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Review the completion data. If you are not yet at your target response rate, consider updating your strategy similar to Week 2.

## Week 4

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Send a reminder email and/or leave a reminder notice encouraging people to complete the self-ID survey by the end of the week (email template below).

### Email template: third email with questionnaire

**Subject:** Complete our workforce survey

Hi [Employee first name],

In case you missed it, we are collecting information about our employee demographics to better understand our workforce and support our employment equity goals.

**Complete this short [survey – add URL] to help us improve our workplace.**

All responses will be kept confidential within the organization and only used to meet our employment equity obligations.

If you have any questions, email or call XXX-XXXX (ext. XX) to reach [name].

Thank you,

[Name]

[HR Director/ Main contact title]

## 03 After the campaign

**Identify what worked well and areas for improvement to inform future campaigns.** Meet with campaign leaders and stakeholders (e.g., HR leads, managers, champions, and Employee Resource Groups) to collect feedback. This should include what they liked or did not like about the campaign, what factors influenced their decision to participate or not, and suggestions for future campaigns. Employers can also use data on overall response / completion rate and responses to specific communications or outreach strategies to refine strategies for future self-ID campaigns.

**Show employees how self-ID data is being used to improve the organization.** Once you have collected data on your workforce, update employees on how this information is being used to further employment equity in their workplace. These communications may enhance employee trust and generate buy-in for future campaigns or surveys.

If you seek guidance on how to use data to implement employment equity, you can consult these resources: [Tools and Resources](#) or contact us at [ee-eme@servicescanada.gc.ca](mailto:ee-eme@servicescanada.gc.ca).