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Mobilizing Momentum in the Science and Practice of Behavioural Insights



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Modernizing Self-Identification in the Federal Public Service

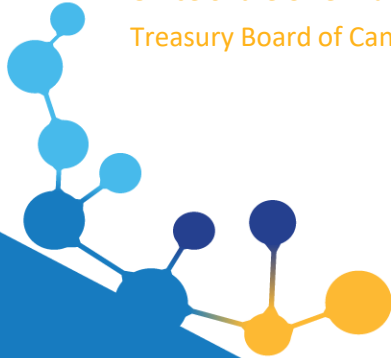
A Behavioural Insights + Human Centred Design Approach to Experimentation

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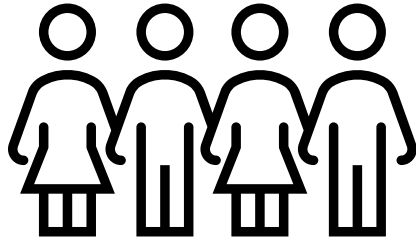
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Self-Identification Modernization



- Self-Identification (self-ID) is the process whereby government collects self-report data from employees to understand workforce representation of four employment equity groups: women, persons with disabilities, Indigenous peoples, and visible minorities
- The self-ID form is the main tool by which this information is collected, and has long been recognized as due for modernization. In addition, response rates to the form could be improved.
- Our new form has been developed using an integrated approach, blending human centred design and behavioural insights to design, experiment, and iterate

An Integrated Approach to Experimentation in Self-ID

Human-Centred Design

Building Understanding of Target Group(s)

Surrounding Context

Attitudes/Beliefs

Drivers

Barriers

Experiences

Behavioural Insights

Existing Literature

Key Behaviours

Testable Solutions

Hypothesis

Experimentation

Test Solutions

Measure Behaviours

Analyze + Recommend

Insights gleaned from HCD allow for the formulation of hypotheses, design of testable solutions for experimentation, and interpretation of results

Barriers to Self-ID

Both HCD and the BI literature were used to identify barriers to self-ID responding



Justin Luebke/Unsplash

Human-Centred Design

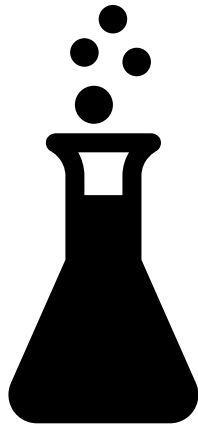
- Mistrust
- Use of outdated terminology hinders positive identification
- Uncertainty as to the purpose of self-ID



Behavioural Insights

- Intention-action gap
- Attentional capacity
- Barriers to completion
- Present bias
- Lack of authoritative messenger

Self-ID Experimentation: Three Experiments



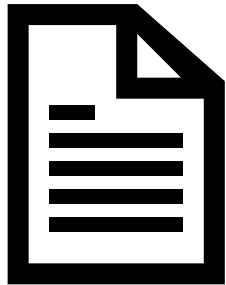
1. Optimize form design using experimentation
2. Identify most effective communications to improve self-ID in executives
3. Identify most effective communications to improve self-ID in general public service workforce

Experiment 1: Form Design Optimization

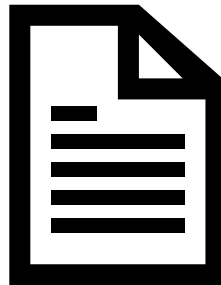
OCHRO conducted an experiment to understand whether the proposed user-centric changes to the self-ID questionnaire had the intended effect of increasing response rates.

Participants: 80 public servants from across the Government of Canada, each randomly assigned to see one version of the form.

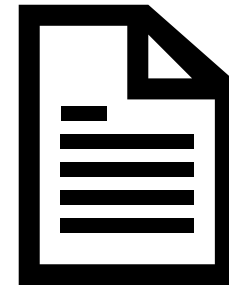
Results: For Modern+BI, a **75% increase** in **intent** to self-identify, **88% increase** in **comprehension** on average across various metrics of comprehension, **65% increase** in those that reported their **identity is captured** by the new form, **30% increase in trust** in the management of their self ID information:



Control
Status Quo
Current Form



Modern
Adds
modernized
language for
EE groups and
inclusion of
LGBTQ2S+
group



**Modern+
Behavioural
Insights (BI)**
Additional
features
including trust-
building
preamble,
nudge
interventions,
open text
boxes, etc.

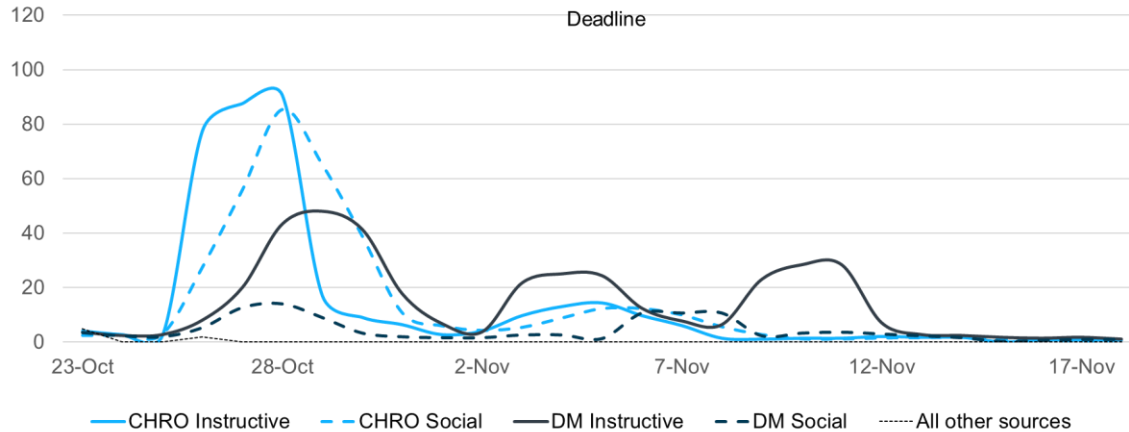
Experiment 2: Increasing Self-ID Rates for Executives

- The trial was a 2x2 design that tested two key behavioural science principles:
- **Messenger Effects:** People respond differently to prompts based on who they are receiving it from. Messages were sent by either the Chief Human Resources Officer (CHRO) or Deputy Ministers in each department.
- **Message Type:** individuals are more likely to take an action when they know that many of their peers are also taking that action (social norm). Messages were sent with a social norm prompt or instructive prompt.

Number of participants by condition (N=5,698)		Messenger	
		CHRO	DM
Message Type	Instructive	1,015	1,025
	Social Norm	1,161	1,284

Experiment 2: Results

The graph below plots the three-day moving average of clickthroughs per day for each of the treatment groups in the trial:



- Providing **clear and authoritative instructions** was 220% as effective than focusing on social norms.
- A **message from the CHRO was more effective** than from DMs:
 - **Faster**: 2.1x as many executives took action before the deadline if they got an email from the CHRO.
 - **Easier**: The Office of the Chief Human Resources Officer can control messaging and timing directly – some depts altered the email text.
 - **Better**: 140% as many executives took action after a message from the CHRO.
- **Direct outreach** is by far the most effective – only 8 users clicked through from other sources (e.g. Newsletter).

Experiment 3: Increasing Self-ID Rates for the Public Service

- The trial tested the effect of three email messages on response rate by employees to the new self-ID form at a medium sized federal government department.
- Employees were randomly assigned to receive one of the following email messages with a link to the form:
 - **Condition A (informative)** – Message with background information on the new self-ID form with no behavioral “nudge”.
 - **Condition B (action)** – Streamlined, concrete, actionable message prompting respondents to complete the self-ID form.
 - **Condition C (action + invitation)** – Same message content as Condition B, but sent as a meeting invitation blocking time in employees’ calendar.
- The trial period was over two weeks in June 2021.

Number of Employees by Condition

Condition	Number of Employees
Informative	1501
Action	1518
Action + Invitation	1502
Total	4521

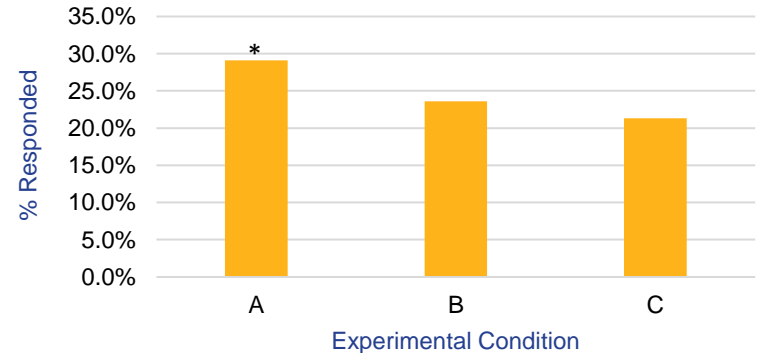
Experiment 3: Results

- A logistic regression showed that Condition A (informative) was the most successful in translating into responses, with 29.1% of participants responding within the trial period.
- Overall, 24.7% of participants responded within the trial period – with 23.6% in Conditions B (action) and 21.3% in C (action + invitations) responding.
- Information-rich communications is better at increasing response rates in self-ID than simplified, action-focused messaging.

Responses During Trial Period by Condition

Condition	Responses	% Responded
Informative (A)	437	29.1%
Action (B)	358	23.6%
Action + Invitation (C)	320	21.3%
Total	1115	24.7%

Responses During Trial Period by Condition



Self-ID Experimentation: Key Insights

01

Integrating Human-Centred Design with Behavioural Insights approaches allows for stronger and more precise hypothesis formation, intervention design and data interpretation.

02

Self-Identification forms that use modernized language and BI elements outperform traditional forms in intent to respond.

03

When it comes to self-ID, the source of the message matters, and direct, instructive messaging works better than messaging emphasizing social norms.

04

Contrary to typical findings in BI, information-rich communications is better suited to the sensitive and complex context of self-ID, potentially a consequence of mistrust surrounding self-ID.

Thank You!



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