# Behavioural Insights in the Workplace



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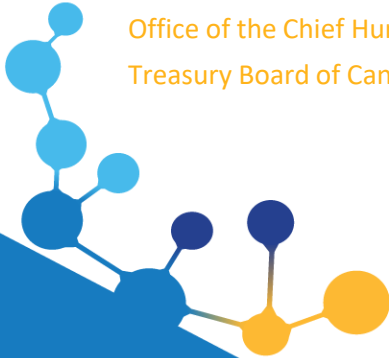*Treasury Board Secretariat,*
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# Using Behavioural Insights to Improve the Federal Public Service Employee Experience

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Office of the Chief Human Resources Officer

Treasury Board of Canada Secretariat

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Treasury Board of Canada Secretariat

There are opportunities to apply behavioural economics in all kinds of domains. And the place I think that's ready for a revolution is Human Resources.

**Richard Thaler**
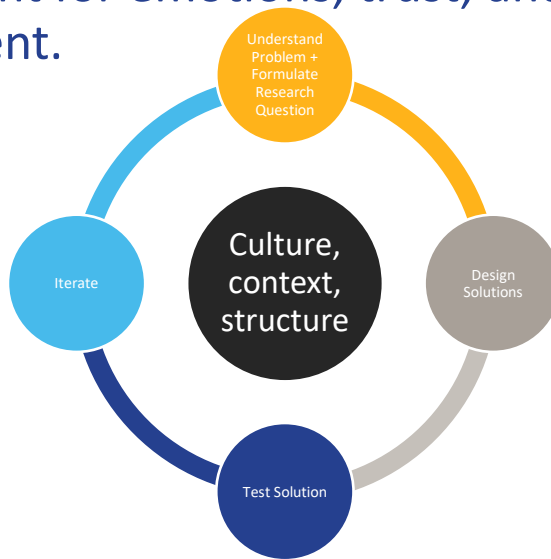
# A bit about our team

- We are a mix of researchers including behavioural scientists, human centred designers as well as policy experts and HR professionals

- Together we use interdisciplinary approaches to provide holistic, measurable, and impactful solutions.

- We've worked in domains as broad as diversity and inclusion, culture of service, future of work, and health and wellness.

# Bridging Qualitative and Quantitative Insights

- Our research works at the intersection of Human Centred Design and Behavioural Insights

- Human Centred Design allows us to explore the broader context and understand self-reported barriers to the desired behaviour by our target population

- Behavioural Insights allows us to test solutions and gain quantitative insights to what works and what does not

- The integrated approach holds tremendous value, particularly for challenges in EDI (Equity, Diversity and Inclusion)

# Why the two-pronged approach for EDI?

- Equity, Diversity and Inclusion (EDI) is complex, with cultural, contextual and structural factors influencing key behaviours

- BI is a valuable tool but without qualitative insights, a strict BI approach will not capture and account for emotions, trust, and complexities of EDI initiatives in government.

Understand Problem + Formulate Research Question

Iterate

Culture, context, structure

Design Solutions

Test Solution

Understanding contextual factors through qualitative research allows us to formulate better research questions, informs the design of our solutions, and our interpretation of results from our trials.

# Human-Centred Design and Behavioural Insights: Complementary Approaches in EDI

| | HCD | BI |
|---|---|---|
| **General research approaches** | Interviews, group sessions, micro-missions | Exposure to "treatment" or "control" and resultant behaviour captured |
| **Data** | Qualitative | Quantitative |
| **Insights obtained** | Thoughts, feelings, perceptions, self-reported behaviour | Behaviours |
| **Granularity** | General, global, contextual | Precise, fine-grained, situation-specific |
| **Value for D&I** | Gain understanding of context, personal experience, and target individuals' proposed approaches to tackling a problem | Gain precise understanding of what is involved to "move the needle" on a key behaviour of interest |

**Using insights from HCD allow for evidence-informed hypothesis generation, design, testing and interpretation.**

# Self Identification Form Modernization

- The self-identification form is critical tool to collect employment equity data to understand representation of four employment equity groups in the federal public service: women, Indigenous people, visible minorities, and persons with disabilities.

- Our form was designed using a combination of human centred design (HCD; qualitative) and behavioural insights (BI; quantitative) approaches

- HCD workshop with public servants allowed for an understanding of barriers and potential solutions surrounding self-ID

-  BI + HCD fed into design of a new self-identification form

# Self-ID Form: Methodological Approach

## Human-Centred Design
- We hosted 25 employees from equity groups for a three-week workshop to identify problems and co-create potential solutions. Participants were randomly selected based on several diversity markers.

## Experimentation
- We led experiments to test recommendations in the field using behavioural science.
- Experiment 1 tested features of a co-designed, behaviourally informed questionnaire and how they impacted trust, behavioural intent, and comprehension.
- Experiment 2 and 3 tested communications to improve Self-ID rates
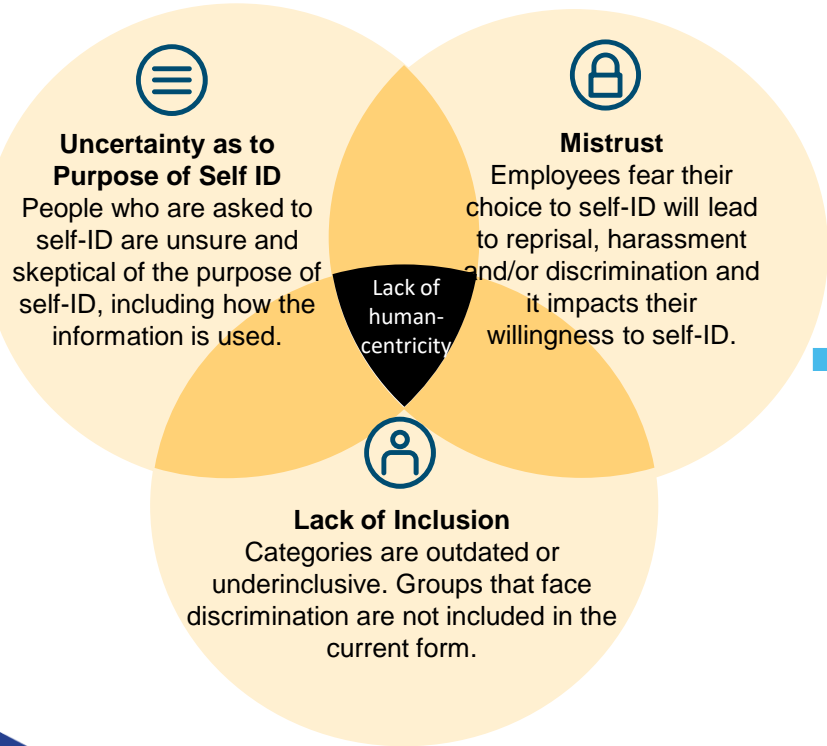
## Consultation
- Extensive consultations took place with various groups including employment equity groups, HR, and corporate stakeholders.

## Evidence-Based Deliverables

The combination of Human Centred Design and Behavioural Insights research methodologies alongside traditional approaches like consultation enable the delivery of products that center contextual factors, are evidence-based, and implementable

# Human-Centred Design

# BI Literature

**Solution Generation for Modernized Form**

**Uncertainty as to Purpose of Self ID**
People who are asked to self-ID are unsure and skeptical of the purpose of self-ID, including how the information is used.

**Mistrust**
Employees fear their choice to self-ID will lead to reprisal, harassment and/or discrimination and it impacts their willingness to self-ID.

Lack of human-centricity

**Lack of Inclusion**
Categories are outdated or underinclusive. Groups that face discrimination are not included in the current form.

Elements in the form were developed using insights from HCD and the BI literature, tested, and consulted upon, producing 24 iterations before being finalized.

# Insights from our HCD-Informed BI Trials

- **Trial 1:** Modernized+BI elements on form outperformed more traditional form on intent to self-identify, comprehension, and trust

- **Trial 2:** Authoritative email message from Chief Human Resources Officer (as opposed to Deputy Ministers) encouraging self-ID completion elicited the greatest number of clickthroughs to self-ID

- **Trial 3:** Email messages that were the *least* action focused (more informative) elicited the highest rate of self-ID form completions

All three trials were developed with hypotheses formulated with our HCD research and interpreted in light of our HCD work.

# Potential BI Applications at OCHRO

- Future of work

- Executive Recruitment and D&I

- Productivity and engagement

- Employee health and wellness

# Thank You!