



Technical Specification

ISO/TS 30438

Human resource management — Employee engagement metrics

*Management des ressources humaines — Indicateurs
d'engagement des employés*

**First edition
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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular, the different approval criteria needed for the different types of ISO document should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

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This document was prepared by Technical Committee ISO/TC 260, *Human resource management*.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at www.iso.org/members.html.

Introduction

Employee engagement is a rapidly developing field of study that is increasingly critical to the effective management of human resources within an organization. This document has been created to provide guidance for those wishing to develop metrics through which desired degrees of engagement can be established, tracked, and monitored. Effective metrics used for employee engagement complement, support and reinforce several other areas of human resource management.

Employee engagement is a result of the experience that a person has at work and how it affects them. The degree of employee engagement influences many organizational measurements such as productivity and performance, absenteeism, accidents, retention rate, and even individual productivity and health. A high degree of employee engagement can positively influence these metrics and conversely a low degree of employee engagement can negatively influence these metrics.'

Thus, employee engagement is part of a holistic system of workplace environment, often referred to as culture. In ISO 30414, employee engagement is included as a sub-set of organizational culture metrics.

Typically, metrics are developed for and used by multiple stakeholders. This document is related to the United Nations Sustainable Development Goal 8, Decent Work and Economic Growth, and is intended to be used by:

- organizational governance bodies and leaders;
- people with HR expertise;
- managers;
- entrepreneurs;
- individuals in the workforce and their representatives;
- professional and trade bodies;
- academics and other professionals interested in employee engagement;
- developers of related standards.

Employee engagement is driven by several factors. An effective system of metrics should be able to inform the relationship between conditions and antecedents and outcomes being observed. Without this linkage, corrective action required to change the outcome cannot be identified.

Additionally, lack of engagement can be related to a part of the work environment that is not in the control of the directly responsible leader or manager. Effective engagement metrics should clearly show related factors that can be linked back to specific accountability.

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Human resource management — Employee engagement metrics

1 Scope

This document provides recommendations on how to measure individual employee engagement and whether to aggregate this data to an enterprise view. It demonstrates how the use of a strategic framework for employee engagement determines the key aspects that drive employee engagement, and how a framework of metrics can be developed that link positive or negative outcomes to one or more of the strategic drivers, to link cause and effect.

The document also demonstrates the linkage between individual engagement and the role and performance of management at all levels to understand and manage the conditions that impact actual engagement. It demonstrates the complexity and interconnectedness of values, behaviours, processes, systems, and relationships that create a system of inter-dependency responsible for the achievement of optimum employee engagement.

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 30400, *Human resource management — Vocabulary*

ISO 30414, *Human resource management — Guidelines for internal and external human capital reporting*

ISO 23326, *Human resource management — Employee engagement — Guidelines*

3 Terms and definitions

For the purposes of this document, the terms and definitions given in ISO 30400, ISO 30414, and ISO 23326 apply.

ISO and IEC maintain terminology databases for use in standardization at the following addresses:

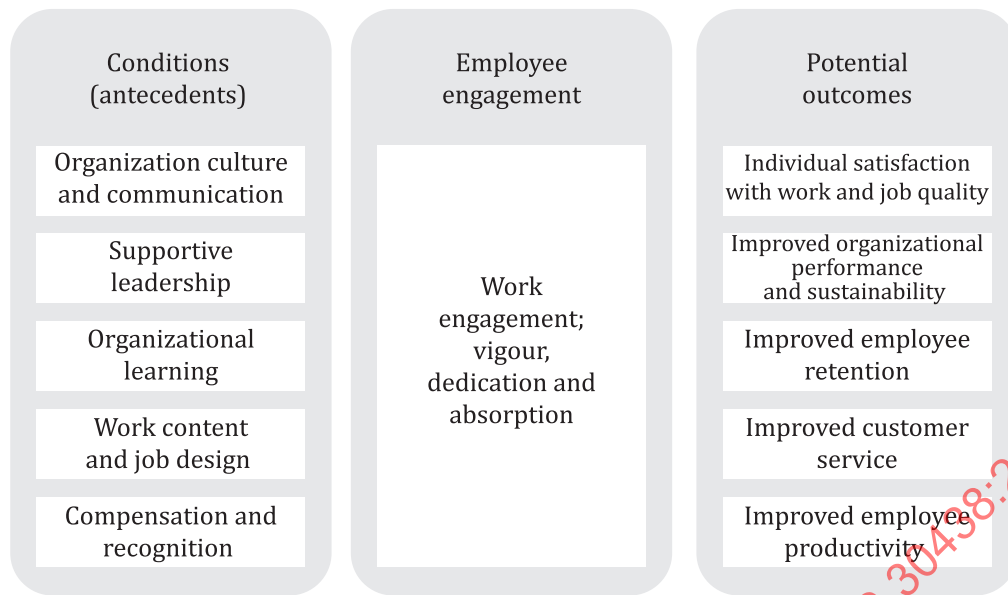
- ISO Online browsing platform: available at <https://www.iso.org/obp>
- IEC Electropedia: available at <https://www.electropedia.org/>

4 Framework for employee engagement metrics

4.1 The concept of employee engagement

4.1.1 General

The degree of employee engagement is an outcome created from several conditions; these conditions can be considered the strategic foundations necessary to create an organizational culture within which engagement can be optimized. All organizational stakeholders have a role to play in creating, implementing, maintaining, and improving employee engagement, principally the senior leaders, managers, HR experts, employees, and employee representatives.



NOTE See ISO 23326.

Figure 1 — Overview of employee engagement framework

Conditions or antecedents drive employee engagement that requires measurement to assess both actual and potential organizational and individual outcomes^{[2],[3]}.

4.1.2 Conditions or antecedents^[4]

The conditions or antecedents of employee engagement used in this framework indicate the strategies, policies, procedures, approaches to leadership, operational work planning and execution and all other aspects of the workplace environment that impact an individual's degree of engagement. These are typically unique to each organization and form the foundation of understanding the cause-and-effect analysis impacting the degree of engagement.

Apart from the factors that management can directly control, there are other external conditions that can have an impact on employee engagement. These can be considered as external conditions, or sub-component (see 5.2, Table 1). These conditions include personal issues that can occur outside of work but still affect an employee's degree of engagement while on the job. While these are external to the model shown in Figure 1, they should be considered when developing metrics and assessing potential outcomes. Examples include domestic situations, stability of home life, stress from external activities or part time study.

4.1.3 Employee engagement

Measures of employee engagement reflect the degree to which an individual is absorbed and dedicated to their work and operates with energy and vigour. Employee engagement is impacted by the approaches taken by the organization to support its staff in a manner which provides quality work and opportunities for development and professional fulfilment. Employee engagement occurs when workers are committed and motivated to apply every effort within their power to help achieve individual, group and organizational goals. Measurement of engagement assesses a higher degree of employee commitment than employee satisfaction measures.

Engaged employees are typically satisfied with their jobs; however, a higher degree of satisfaction does not necessarily increase engagement. A positive degree of employee satisfaction reflects workers enjoying their job — but not necessarily being engaged with it.

Degrees of engagement have been shown to have an impact on an individual's health and wellbeing. Engaged employees also enhance the probability of increased organizational performance outcomes.^{[2],[3],[5]} Employee retention is an outcome related to degrees of engagement (ISO 30414). Enhanced customer service

is a key outcome related to employee engagement (ISO 30414); the ISO 10667 series provides guidance on assessing customer service outcomes.

4.2 Purpose of measuring employee engagement

Knowing the degrees of employee engagement is of value when it can be correlated to individual or organizational performance, and when it can be linked back to conditions that an organization can plan and manage.

Much of the concept of employee engagement, including foundational approaches to the measurement of engagement have been developed at the individual level. These approaches tend to be well-researched, statistically validated and effectively linked to specific individual outcomes such as individual performance, personal health and wellbeing and individual intentions to remain or leave an organization. This approach has also included linkages between “generic” conditions or drivers of engagement – such as those shown in [Figure 1](#) and the degrees of engagement achieved by an organization.

More recent approaches to understanding and measuring employee engagement have attempted to address engagement as a collective indicator that can be aggregated and linked to organizational outcomes. Additionally, advances in understanding the conditions or drivers of engagement have revealed that factors other than the traditional generic approaches are important in understanding both individual engagement as well as linkages to organizational performance.

For this reason, the measurement of individual engagement has a higher probability and confidence. Aggregation of individually collected generically developed engagement measures is less reliable, as a metric that management can respond to by taking actions that have some expectation of changing the actual degree of engagement and outcomes. Thus, caution should be exercised when approaching the measurement of employee engagement through survey tools that are based on generic conditions and which attempt to simplistically aggregate individual data as a reflection of organizational engagement.

5 Measuring employee engagement

5.1 Business model framework

[Figure 1](#) provides a foundational framework for employee engagement. [Figure 2](#) illustrates the business model framework within which employee engagement is measured, using the input, activity, output, and outcomes steps.

Organizations seek to optimize outputs and outcomes for the benefit of stakeholders, through the effective planning and management of activities, processes, and tasks. People who constitute the workforce, are a key input and form an essential part of these activities. Measurement of employee engagement provides an employee-centric view of the effectiveness with which this is occurring. Understanding of degrees of employee engagement provides information helpful in determining both individual and collective outputs and outcomes.

When measurement data collection is structured effectively, the results provide insight into the conditions and antecedents that are impacting the current degrees of engagement. Through this management can work with the employees to remove barriers and improve engagement.

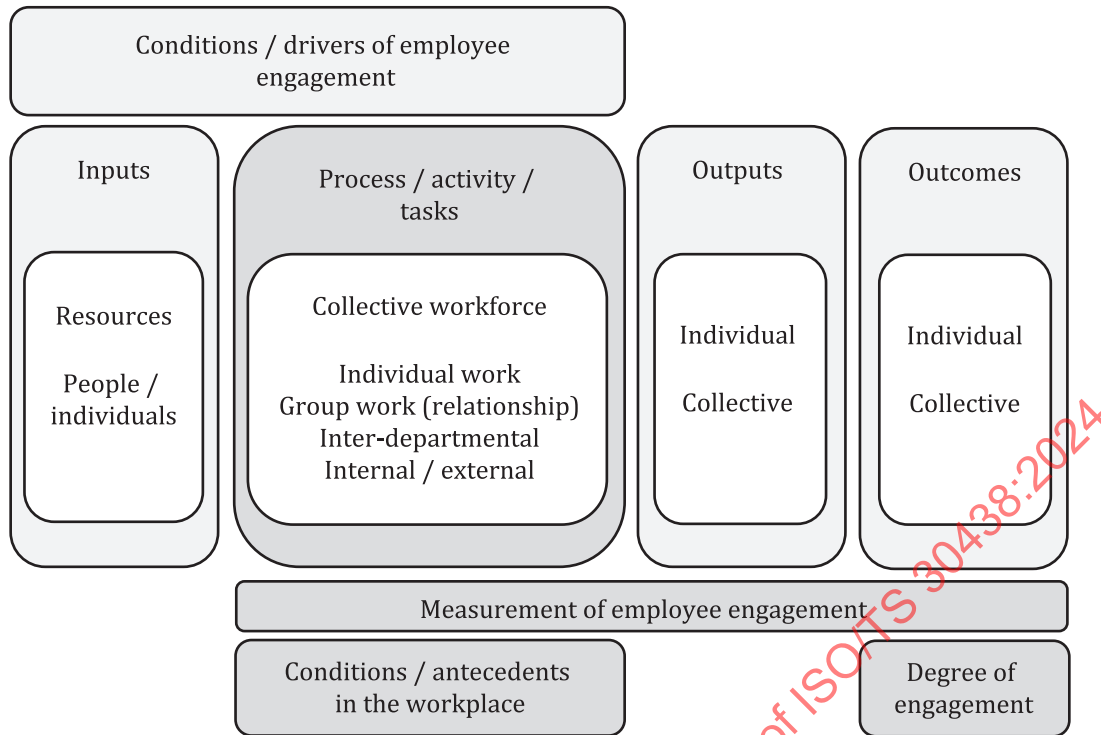


Figure 2 — Employee engagement within input, process, output and outcome model

5.2 Individual and collective engagement

While employee engagement is the focus of measurement, the term “employee” often refers to all people who are providing the human resource. This includes full-time employees plus part-time, contract, sub-contract employees and even employees of others within a supply chain.

In the process, activity and task aspect, people are brought together and often work collectively with other resources such as equipment and tools to create the desired outputs. The work environment within which this takes place impacts engagement; part of this environment includes aspects defined within [Figure 1](#); but others include the impact of direct leadership, work relationships both within the individual’s working area and with others internally and externally, inter-personal relationships, the effectiveness of leadership and the availability of tools and equipment that also act as drivers to positive or negative responses.

Individual performance can be attributed to individual engagement and can be measured in terms of outputs (productivity) and outcomes (retention). However collective outputs occur because of the work and engagement of groups of people. While group outputs can be attributed to equivalent group aggregation of engagement, higher level aggregation, where there is a multiplicity of inter-relationships and inter-dependencies, such as people having different supervisors, can be misleading.

Individual outcomes can also be linked back to issues such as “risk of resignation”, individual health and well-being and other individual outcomes. However, the collective outcome, particularly at the organizational level, cannot be directly linked to total organizational performance, although correlation has been identified.

The definition of “workplace” is also changing because of the growth in remote work. Tools to assess individual and collective engagement continue to develop as the impact of these changes takes place. Because of the complexity of factors impacting employee engagement, users should be clear on the purpose for which data are being collected, selection of the relevance of questions being used, and cautious in the conclusions that are reached when interpreting results and taking actions.

5.3 Reason for measuring employee engagement.

Every approach to measuring the degree of employee engagement should be driven by a clear purpose. For each data set collected, a clear purpose defines sections of the workforce to be included, questions to be asked that produce valid and reliable results, and the relevance of actions taken based on results.

The value derived from measuring employee engagement comes from one of three conclusions derived from the results.

- The degree of employee engagement observed and measured aligns with desired degree of employee engagement. Management should maintain course.
- The degree of employee engagement observed and measured is decreasing indicating potential risk to future outputs and outcomes. Management should consider actions.
- The degree of employee engagement observed and measured is out of alignment with that expected. Conditions and drivers of engagement can be negatively impacting outputs and outcomes. Management should take actions immediately.

While employee engagement measurement can be considered straightforward, [Table 1](#) illustrates the breadth of conditions that impact engagement results; it also illustrates that outcomes (and outputs) can be related to management actions at any other levels of aggregation. Without clarity of purpose, results of measuring engagement cannot be adequately focused to allow conclusions and actions to be taken.

Table 1 — Framework for developing and understanding employee engagement.

Figure 1 Framework component	Sub-component	Information derived from measurement
Conditions	Internal	Aspects of an organization that management can plan and implement that form the foundation for determining the work environment within which individuals operate. These are the “managed” drivers of employee engagement.
	External / personal	Personal “non-work” events that impact on the individual, that affect their behaviour and their degree of engagement.
Employee engagement	Individual	Responses indicate the composite degree of each individual’s engagement based on both internal and external conditions.
Potential outcomes	Organization	Outcome metrics at the collective level related to performance of work teams, groups and organization.
	Individual	Outcomes related to each individual (wellbeing, retention).

5.4 Measuring employee engagement

5.4.1 Qualitative and quantitative

The measurement of employee engagement requires both qualitative and quantitative approaches. The questions asked to obtain feedback are predominately quantitative with responders expressing their feelings and opinions related to the question asked. Responses are typically required using a Likert rating scale.

Quantitative approaches involve the development of questions that can be administered either through surveys or as part of a pulse survey type of approach. The understanding of responses requires significant use of quantitative techniques to ensure validity between the questions and the development of useful information upon which management can act. Questions asked and responses should be shown to have:

- statistical validity to one or more outputs or outcomes;
- statistical validity to conditions or drivers that impact the response to the questions.

Only through these connections can the measurement of employee engagement add value that allows management to correlate decisions, policies, procedures, and behaviours relative to the operation of the

workplace, and a proven linkage between the results from measuring employee engagement and individual or organizational performance.

Qualitative feedback should supplement the use of quantitative tools. Discussions with employees can reveal issues and concerns which management can use to understand the “why” of quantitative feedback. Approaches such as manager one-on-one coaching sessions, focus groups, and exit interviews can provide valuable feedback. These can be supplemented by real-time feedback such as pulse surveys.

5.4.2 Data collection approaches

In developing approaches to employee engagement measurement, data collection takes place for several purposes at different times:

- data collection used to develop questions related to issues (drivers and conditions) that impact employee engagement (what are the right questions that need to be asked);
- data collection from the target audience for the employee engagement assessment, through:
 - traditional employee surveys – on-line or manually administered;
 - focus groups and other small-group open forums such as departmental groups and work councils or employee representative bodies;
 - “pulse surveys” where data can be collected in real time;
- data collection using the responses from the survey to assist in feedback to determine priorities and actions required (what are the responses revealing, and what actions do employees see as having priority).

Key to measurement of effective employee engagement is the consultation and participation of the “voice of the employee”. Active engagement with involvement of employee representatives, such as work councils, is a key requirement for the effective development, implementation and evaluation related to the measurement of employee engagement. This consultation and engagement can also be a significant source of qualitative input.

Consideration should also be given to the existing work climate and the level of openness and honesty of responses. In early stages of measuring engagement, anonymous responses can gain more accurate results. Organizations should respect the confidentiality, protection of privacy and sensitive information about people at all times.

5.5 Employee engagement and outputs / outcomes

5.5.1 General

Employee engagement has been proven to statistically correlate with both individual outputs and outcomes. Early work on measuring engagement focused on outcomes related to the individual. This is becoming increasingly important when assessing the effectiveness on work conditions related to the reality of diversity, equity, and inclusion.

It has also been demonstrated that higher degrees of employee engagement correlate with improved organizational outcomes. Two examples of early applications to measure employee engagement are outlined in [5.5.2](#) and [5.5.3](#).

5.5.2 The Utrecht Work Engagement Scale (UWES)

This assessment is based on a set of scientifically validated, standardized questions that measure individual responses related to conditions in the workplace. The original self-assessment is based on seventeen questions centred around three main areas.

- Vigour: a series of six questions that assess degrees of energy and mental resilience while working, the willingness to invest effort in one’s work, and persistence in the face of difficulties.

- Dedication: a series of five questions that refer to being involved in one's work, finding meaning in one's work, being challenged, and experiencing sense of enthusiasm, inspiration, and pride.
- Absorption: six questions that refer to being fully concentrated and engrossed in one's work, whereby time passes quickly, and one has difficulties detaching oneself from work.

Each question is scored on a standardized seven-point rating scale. Initially the test was developed as a predictor of individual burn-out. However, since the scale was developed several studies have demonstrated other personal and organizational benefits. These include:

- job satisfaction, organizational commitment, and low turnover intention;
- positive organizational behaviour such as, personal initiative and learning motivation;
- willingness to take on additional work (extra-role behaviour);
- proactive behaviour (taking initiative).

The UWES has since been evaluated using a reduced series of questions and is considered to continue to demonstrate reliability. UWES remains one of the most solid approaches to measure individual engagement and has been used in comprehensive studies^[8].

5.5.3 Gallup organization

The Gallup organization has extensive experience in gathering data related to employee engagement. The company publishes an annual report titled the "Q12 Meta Analysis" ^[12] that presents a series of results on employee engagement based on twelve solidly researched, developed, and tested questions. This assessment approach referred to as the Gallup Workplace Audit[®] was developed at around the same time as the UWES.

Measuring employee engagement provides a valuable metric and the annual report provided by Gallup demonstrates a strong correlation between degrees of employee engagement and a basket of organizational performance indicators. This provides organizations with a necessary validation that there is a connection between developing employee engagement and the probability of an improved organizational outcomes.

More detailed understanding of the background, research and development of the above approach, and the relevant questions has also been published and is publicly available^[7].

5.5.4 Other approaches based on engagement / outcome linkage

In the two measurement approaches quoted in 5.5.2 and 5.5.3, extensive development and modelling have substantiated cause and effect between employee engagement scores and certain desired outcomes. The question sets developed are considered protected intellectual property and therefore are only accessible through authorized sources.

More recently studies have been conducted that further reinforce the connection between degrees of employee engagement and organizational performance.^[8] Based on these studies many consulting organizations now offer employee engagement measurement services, that in most cases are based on their own proprietary research. Organizations that choose to contract for outside services to conduct employee engagement surveys should investigate this supporting evidence to assure themselves that the questions being administered have been scientifically and statistically supported.

Based on research into these various approaches, certain key aspects can form the foundation of the question sets that may be developed as a base for internally administered surveys.

5.6 Employee engagement and conditions / drivers

5.6.1 General

Measuring employee engagement as a predictor of individual or collective outcomes can help management identify trends and opportunities for improvement. However, for management the goal is to understand

what aspects of organizational conditions / drivers are impacting current degrees of engagement and what opportunities for improvement can exist by changing these.

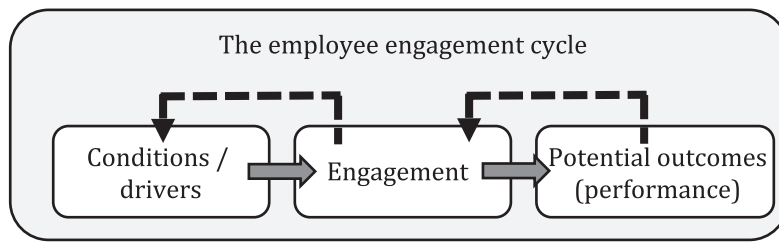


Figure 3 — Linking engagement and conditions / drivers

The goal for measuring engagement is to gather information that allows changes to be made to “current state of operations” that bring the organization more closely to the desired state – the target being an increase in engagement. [Figure 3](#) shows how conditions / drivers are the basis of “current state” engagement, which drive current outcomes. Outcomes can also impact engagement (e.g. positive feedback from customers), and monitoring engagement can provide feedback for conditions that impact engagement. Measuring engagement should provide a clear linkage back to the conditions / drivers so that a potential action, if needed, can be taken by management.

Approaching the measurement of employee engagement can start with developing and using a generic set of questions built around what can be considered foundational aspects of both individual and collective engagement. However, over time, as an organization engages more deeply with the workforce and expands its understanding of the unique drivers in their own organization, a series of custom questions can be developed and “fine-tuned” that more closely link cause and effect.

5.6.2 Developing a generic question set.

Engaging employees through focus groups and other approaches (the voice of the employee) in order to better understand the linkages between antecedents / conditions and degrees of engagement are an important aspect to building an effective question set.

Many organizations utilize surveys for data gathering. Generic questions may be initially used, but the goal should be to develop a set of custom questions. These can be evolved as the understanding of the organization unique conditions / antecedents as drivers of engagement are understood.

LOW	Understanding of the drivers (Conditions / antecedents) of engagement	HIGH
GENERIC	Development of question sets	CUSTOM

Figure 4 — Maturity of question sets based on understanding of engagement

[Figure 4](#) demonstrates that where the understanding of drivers is lower, a generic question set (based on general observations related to engagement) provides valuable information that can be used as a basis for discussion around engagement and possible problems, issues, and barriers. Guidance on conditions for engagement can also be found in motivation studies^[9].

Discussions of the results should allow a clearer understanding of organization specific aspects of engagement, can then be incorporated into future question sets. While the use of common or standard question sets can assist in benchmarking results, the conditions that create engagement include many aspects that are organization specific.

While there are many generic question-sets in use in the marketplace, most have a commonality of questions around four main topics. [Annexes A](#) through [D](#) provide example question sets using the categories shown in [Figure 5](#).

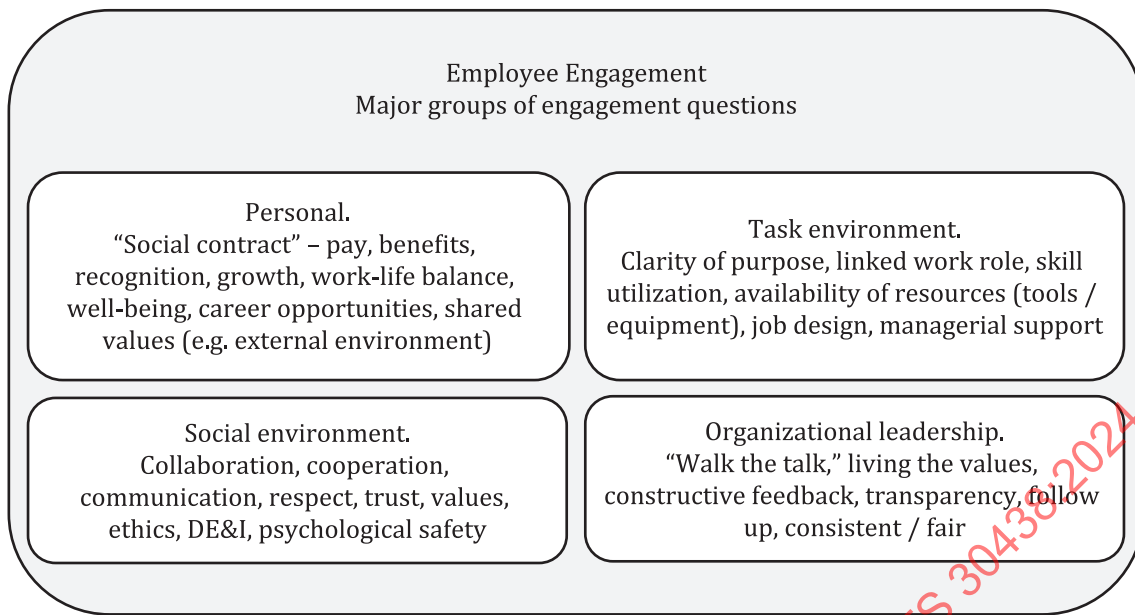


Figure 5 — Major groupings of engagement questions

Organizations can select from these example sets to develop their own generic employee engagement assessments. Selected questions can be taken from each of the four categories. Guidance on use is provided in [Annex E](#).

- **Personal.** Questions that relate to conditions that an individual considers to be about the relationship they have personally with the organization. In effect when a person is hired or contracted or otherwise engaged as a member of the workforce, the organization creates a “contract” to pay for their services – as a provider of (labour / human capital) resources. The individual brings with them their skills, capabilities, experience, and knowledge with an expectation that these will be utilized by the organization for mutual benefit.

One important aspect of personal values is the alignment between the organization’s values and those of the individual. An example is the organization’s attitude towards climate change.

- **Task environment.** These questions relate to the “fit” that exists between the individual and the work that they have “been hired to perform.” While both the individual and the organization attempt to develop mutual agreement on “fit” at the time of hiring, once engaged in the actual work reality may not meet expectations. This aspect provides data on the degree of engagement being driven by the actual activities, job / task the individual is assigned to perform.
- **Social environment.** These questions address aspects of motivational theory, and strongly correlate with “organizational culture”. Current degrees of engagement are more strongly impacted by social and relationship aspects because the way work is performed has changed – from more highly focused on individual work (the purpose / task aspect), to being more collaborative / team based. Much work is actually achieved through working with others. If these relationships are positive and supportive, engagement is higher. This in turn leads to operational benefits such as innovation, creativity, and agility. In measuring engagement, the part that relationships impact, should be considered.
- **Organizational leadership.** These questions are important to the assessment of employee engagement. Organizations may have many of the right policies and procedures in place, such as codes of ethics, values statements and commitments, suggestion schemes, diversity and inclusion initiatives, whistle-blowing programs, and many others, yet engagement may remain lower than expected. This may be because employees are disengaged because the organization does not operationalize these commitments in the reality of their day-to-day activity. This can have a major negative impact on engagement and should be assessed. By assessing these aspects management can focus on the source of problems – where their intent is failing to match reality, and action can be implemented to change current reality to the desired state.

Examples of questions related to each of the four categories can be found in [Annexes A](#) through [D](#). Some questions may be repeated in more than one aspect. See also earlier research into engagement categories such as cognitive (creative contribution), emotional (regard for the organization), and physical (daily activity level).^[10]

5.6.3 Scoring, aggregation, and weighting of responses.

5.6.3.1 Scoring

In the examples provided in [Annexes A](#) through [D](#), the suggested approach to individual scoring is the Likert scale, using a score of 1 (strongly disagree) through to 5 (strongly agree). While there is no option for “not applicable” or an alternative not to respond, this can be added but is not recommended. As discussed, the quality, validity and applicability of questions are improved by engaging with members of the workforce prior to finalizing the assessment tool.

5.6.3.2 Aggregation

Employee engagement is personal feedback on how individuals perceive their place in the organization and, using the aggregate scores for each individual, to what degree they individually are engaged. Factors that impact one individual's feedback can be different from others.

Aggregation of departmental data where people are engaged in similar work in a similar environment (supervision etc.) can have some validity. [Table 2](#) suggests that aggregation should be treated with caution when determining what the employee engagement results suggest and what action should be taken.

It is clear that each individual's response relates to their own personal work environment, and that aggregating these results can lead to erroneous assumptions on what action is required. In [Figure 6](#), the antecedents used as examples are those shown in [Table 2](#), and each is assessed for possible variability between individual results.

Table 2 — Different individuals can be responding to different antecedents

Conditions / antecedents	Possible degree of variability impacting individual responses	Response impact
Organizational culture and communication	Culture is highly impacted by direct supervision. Communication is a combination of organization level and individual (e.g. interaction with supervisor).	Medium
Supportive leadership	Response is highly dependent on direct supervision (individual leader).	High
Organizational learning	Responses depend on location, division or department job definition, skill levels, seniority / experience.	Medium / high
Work content and job design	Individual specific - but data related to the work undertaken within one department or job function can be similar, therefore data obtained from people doing similar work can be aggregated.	High
Compensation and recognition	Some level of similarity, but pay ranges typically vary by seniority, experience, job responsibility, performance and others.	Medium

Simple aggregation of all results to produce an organization-wide engagement score can have some “gross” value in identifying trends and comparisons, but in terms of providing cause and effect relationships, aggregation has little meaning unless the workforce is considered as a single homogeneous group of people, all motivated by the same conditions and drivers and all doing similar work using similar tools and equipment and experiencing similar work environment experiences.

The actual question sets used for data collection should be carefully reviewed and assessed for their ability to provide responses that are meaningful when aggregated at any level, such as department, division, group, or organization. These can include:

- different demographics such as lengths of service or age groupings of the population;
- factors that differ in relative importance, such as different conditions or drivers in different departments;
- different numbers of people in different departments (see 5.6.3.3 on application of weighting);
- differing impact of conditions / drivers on engagement, related to the work that individuals or groups are performing, relative to the collective outputs and outcomes.

Additionally, the degree of engagement of each person is most likely to have a different impact on the collective outputs and outcomes.

While aggregation should be approached with caution, large organizations may be able to more effectively aggregate results through the application of advanced statistical approaches. They can conduct multifactorial analyses on aggregate cluster levels using regression analysis. Engagement scores can be segmented, and different scores calculated based on individual and/ or organizational levels.

5.6.3.3 Weighting

When determining aggregated engagement results for any group, it is important to recognize that some groupings (e.g. departments, divisions) are likely to have more employees than others. The weighted average is a calculation that takes into account the varying degrees of importance of the numbers in a data set. If departmental scores are used, the scores of employees in departments with more employees should be given greater weight than the scores of employees in departments with fewer employees. Figure 6 shows the difference between the “average” and the “weighted average” when using departmental data.

Company Employee Engagement Scores (EES)		
Department A	Department B	Department C
300 employees	50 employees	30 employees
Average EES = 26,0	Average EES = 46,0	Average EES = 40,0
% of Total Employees = 79 %	% of Total Employees = 13 %	% of Total Employees = 8 %

Figure 6 — Illustration of impact of weighting by department

If the company simply averaged the departmental data, the company EES for the 380 employees would be $(26 + 46 + 40) / 3 = 37,33$. However, using a weighted average, the company EES becomes $(26 \times 0,79) + (46 \times 0,13) + (40,0 \times 0,08) = 29,7$.

The higher number of employees in Department A has a greater impact on the total EES using the weighted average. Even though the EES for Departments B and C are much higher than those in Department A, they are less influential to the company’s overall EES because they represent far fewer employees.

Averaging the results of all individual employees from all three departments would produce the same result as the weighted average. However, the distinctive differences in departmental engagement scores would be lost. Employee engagement is significantly higher in Departments B and C than it is in Department A.

Weighting can also be used as organizations develop an understanding of the relative importance of certain conditions / antecedents to employee engagement. Those factors having a greater importance or impact on engagement can be weighted more heavily. These weights can be applied when scoring both individual and aggregated results.

5.7 Customized approaches to engagement assessment

Some organizations have made progress in the development of more focused, statistically proven approaches to measuring employee engagement. One example is The Work Environment Survey (WES) program^[13]; organizations can follow a similar approach that develops an assessment of employee engagement that is more closely relevant to their own specific organization.

As the example provided from information available on the WES website demonstrates, this project has been a multi-year effort to understand employee engagement and to attempt to develop questions sets that will provide meaningful metrics. The website contains links to both the methodology used, the results obtained, the reports created, and planned future developments. There are several core aspects to this customized approach:

- statistically driven exercise to develop question sets and surveys that seek to understand the link between outputs, organizational outcomes, and employee engagement;
- development of workforce-driven criteria for understanding the various conditions / drivers that employees (workforce) believe impact employee engagement;
- development and deployment of question sets, linked to perceived conditions / drivers of engagement;
- statistically driven modelling and analysis of data collected to correlate results obtained to linkage with relevant conditions;
- modelling and simulations of results to develop potential changes to conditions and drivers so as to update question sets and analysis of responses;
- continuous learning of the model of employee engagement with an “organizational system” to develop and understand the link between engagement and “whole system” effectiveness.

In addition to these efforts, collaboration with other similar organizations is taking place so as to develop benchmarks and comparable data. However, these efforts should be undertaken with caution because of the variability of factors than may be involved between organizations.

5.8 Contextual factors

Employee engagement is primarily an individual-specific measure and as such understanding the context within which engagement is to be measured should be considered. These may include:

- the type of industry – employee engagement tends to be more directly linked with organizational outcomes in service organizations where direct personal interaction occurs more frequently;
- age of the workforce and maturity of the particular business – lower engagement can create a greater risk of turnover with a younger, more mobile / flexible workforce;
- the difference in skill sets between various departments, and the amount of risk associated with lower degrees of engagement in some key areas (e.g. risk of low engagement with a small group of specialized individuals who are key to sustaining competitive advantage);
- the impact of engagement associated with different work environments; as greater remote work and hybrid workplaces develop different conditions / drivers can emerge^[14];
- the condition of the job market for various individuals and groups within the organization, that tends to impact the point at which disengagement leads to decisions to leave;
- the degree of measures implemented by the organization to consult and involve employees and their representatives in the development, implementation and evaluation of measures related to engagement.

Contextual factors should be considered in trying to understand the linkage between outputs, outcomes, and engagement as well as developing question sets, evaluating responses, and determining action.

5.9 Predictive factors

Employee engagement varies over the long term and can rise and fall as organizations evolve. Actual engagement can well vary with economic conditions, as organizations make changes, as well as when new initiatives such as mergers, acquisitions, or divestitures take place. These are disruptive to people; and this potentially reflects on actual engagement results.

Small changes in overall engagement, for both individuals and groups, should never result in over-reaction. It is important to develop trends and use these trends to anticipate changes in engagement and respond as needed. Actual engagement results— especially when they have been effectively mapped to conditions / drivers, should be subject to traditional statistical control approaches such as establishing upper and lower control limits, within which fluctuations occur.

Predicting the shift in engagement scores based on an understanding of changes in internal conditions can then be used to determine if the changes being made are causing the “system” to trend towards an “out of control” situation relative to lower employee engagement. This predictive approach can also be used to understand the point at which engagement scores start to have an impact on individual actions such as resignations.

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Annex A

(informative)

Generic questions – Personal aspects

[Table A.1](#) contains a series of questions that reflects the types of conditions and drivers of engagement that an individual “feels” relative to their own personal “contract” with the organization.

Table A.1 — Appropriate personal questions

	How I feel personally about my relationship with the organization	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	
	I am fairly compensated for my work						
	I am encouraged by my supervisor						
	I feel positive about our benefit programs						
	My workload is usually reasonable						
	I am encouraged to upgrade my skills and capabilities						
	I am valued for my contribution						
	I am trusted to perform my work						
	The company acts to ensure work / life balance						
	The company is concerned about my personal well-being						
	I am treated fairly by the organization						
	Employee suggestions are encouraged						
	I feel proud to work for my company						
	I would encourage others to work here						
	I receive appropriate recognition when I do good work						
	People have the opportunity to develop						
	Learning and development are encouraged						
	Stress is well managed in our workplace						
	Total results						

If response is:	Score
Strongly agree	5
Agree	4
Neither agree nor disagree	3
Disagree	2
Strongly disagree	1