

ISO/TC 260

Secretariat: ANSI

Voting begins on:  
**2023-12-18**

Voting terminates on:  
**2024-02-12**

---

---

## Human resource management — Employee engagement metrics

iTeh Standards  
(<https://standards.iteh.ai>)  
Document Preview

[ISO/DTS 30438](https://standards.iteh.ai/catalog/standards/sist/57335f30-715b-44bb-9ca7-baa179096a44/iso-dts-30438)

<https://standards.iteh.ai/catalog/standards/sist/57335f30-715b-44bb-9ca7-baa179096a44/iso-dts-30438>

RECIPIENTS OF THIS DRAFT ARE INVITED TO SUBMIT, WITH THEIR COMMENTS, NOTIFICATION OF ANY RELEVANT PATENT RIGHTS OF WHICH THEY ARE AWARE AND TO PROVIDE SUPPORTING DOCUMENTATION.

IN ADDITION TO THEIR EVALUATION AS BEING ACCEPTABLE FOR INDUSTRIAL, TECHNOLOGICAL, COMMERCIAL AND USER PURPOSES, DRAFT INTERNATIONAL STANDARDS MAY ON OCCASION HAVE TO BE CONSIDERED IN THE LIGHT OF THEIR POTENTIAL TO BECOME STANDARDS TO WHICH REFERENCE MAY BE MADE IN NATIONAL REGULATIONS.



Reference number  
ISO/DTS 30438:2023(E)

iTeh Standards  
(<https://standards.iteh.ai>)  
Document Preview

[ISO/DTS 30438](https://standards.iteh.ai/catalog/standards/sist/57335f30-715b-44bb-9ca7-baa179096a44/iso-dts-30438)

<https://standards.iteh.ai/catalog/standards/sist/57335f30-715b-44bb-9ca7-baa179096a44/iso-dts-30438>



**COPYRIGHT PROTECTED DOCUMENT**

© ISO 2023

All rights reserved. Unless otherwise specified, or required in the context of its implementation, no part of this publication may be reproduced or utilized otherwise in any form or by any means, electronic or mechanical, including photocopying, or posting on the internet or an intranet, without prior written permission. Permission can be requested from either ISO at the address below or ISO's member body in the country of the requester.

ISO copyright office  
CP 401 • Ch. de Blandonnet 8  
CH-1214 Vernier, Geneva  
Phone: +41 22 749 01 11  
Email: [copyright@iso.org](mailto:copyright@iso.org)  
Website: [www.iso.org](http://www.iso.org)

Published in Switzerland

# Contents

Page

<b>Foreword</b> .....	<b>iv</b>
<b>Introduction</b> .....	<b>v</b>
<b>1 Scope</b> .....	<b>1</b>
<b>2 Normative references</b> .....	<b>1</b>
<b>3 Terms and definitions</b> .....	<b>1</b>
<b>4 Framework for employee engagement metrics</b> .....	<b>1</b>
4.1 The concept of employee engagement.....	1
4.1.1 General.....	1
4.1.2 Conditions or antecedents <sup>[4]</sup> .....	2
4.1.3 Employee engagement.....	2
4.2 Purpose of measuring employee engagement.....	3
<b>5 Measuring employee engagement</b> .....	<b>3</b>
5.1 Business model framework.....	3
5.2 Individual and collective engagement.....	4
5.3 Reason for measuring employee engagement.....	5
5.4 Measuring employee engagement.....	5
5.4.1 Qualitative and quantitative.....	5
5.4.2 Data collection approaches.....	6
5.5 Employee engagement and outputs / outcomes.....	6
5.5.1 General.....	6
5.5.2 The Utrecht Work Engagement Scale (UWES).....	7
5.5.3 Gallup organization.....	7
5.5.4 Other approaches based on engagement / outcome linkage.....	7
5.6 Employee engagement and conditions / drivers.....	8
5.6.1 General.....	8
5.6.2 Developing a generic question set.....	8
5.6.3 Scoring, aggregation, and weighting of responses.....	10
5.7 Customized approaches to engagement assessment.....	12
5.8 Contextual factors.....	13
5.9 Predictive factors.....	13
<b>Annex A (informative) Generic questions – Personal aspects</b> .....	<b>14</b>
<b>Annex B (informative) Generic questions – Task environment</b> .....	<b>15</b>
<b>Annex C (informative) Generic questions –Social environment</b> .....	<b>16</b>
<b>Annex D (informative) Generic questions – Organizational leadership</b> .....	<b>17</b>
<b>Annex E (informative) Use of generic question sets</b> .....	<b>18</b>
<b>Bibliography</b> .....	<b>19</b>

## 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](http://www.iso.org/directives)).

ISO draws attention to the possibility that the implementation of this document may involve the use of (a) patent(s). ISO takes no position concerning the evidence, validity or applicability of any claimed patent rights in respect thereof. As of the date of publication of this document, ISO had not received notice of (a) patent(s) which may be required to implement this document. However, implementers are cautioned that this may not represent the latest information, which may be obtained from the patent database available at [www.iso.org/patents](http://www.iso.org/patents). ISO shall not be held responsible for identifying any or all such patent rights.

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation of the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT), see [www.iso.org/iso/foreword.html](http://www.iso.org/iso/foreword.html).

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](http://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.



# 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*

<https://standards.iteh.ai/catalog/standards/sist/57335f30-715b-44bb-9ca7-baa179096a44/iso-dts-30438>

## 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:

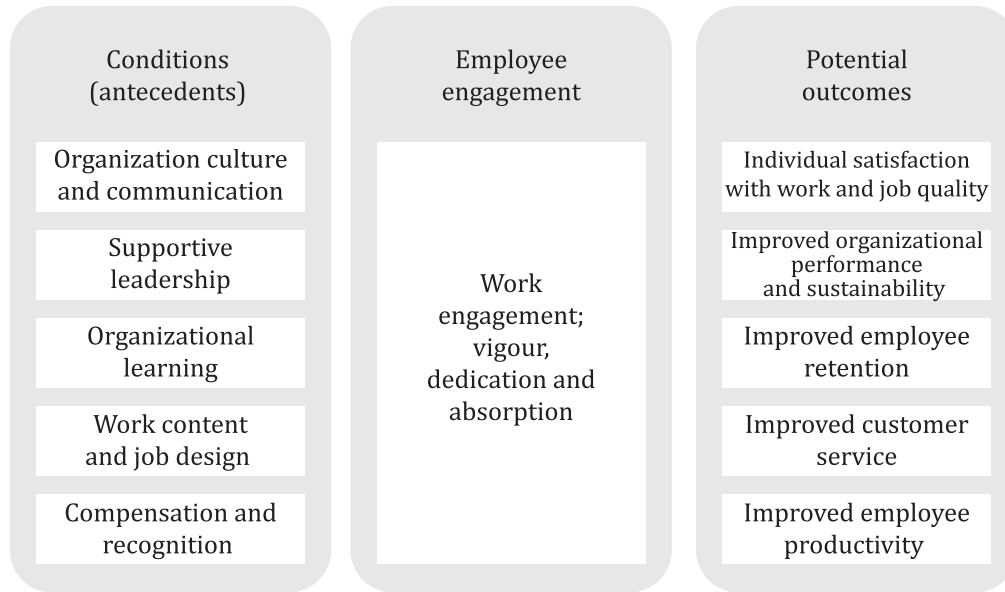
- ISO Online browsing platform: available at <https://www.iso.org/obp>
- IEC Electropedia: available at <https://www.electropedia.org/>

## 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<sup>[2],[3]</sup>.

**4.1.2 Conditions or antecedents<sup>[4]</sup>**

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

<https://standards.iteh.ai/catalog/standards/sist/57335f30-715b-44bb-9ca7-baa179096a44/iso-dts-30438>

### 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.

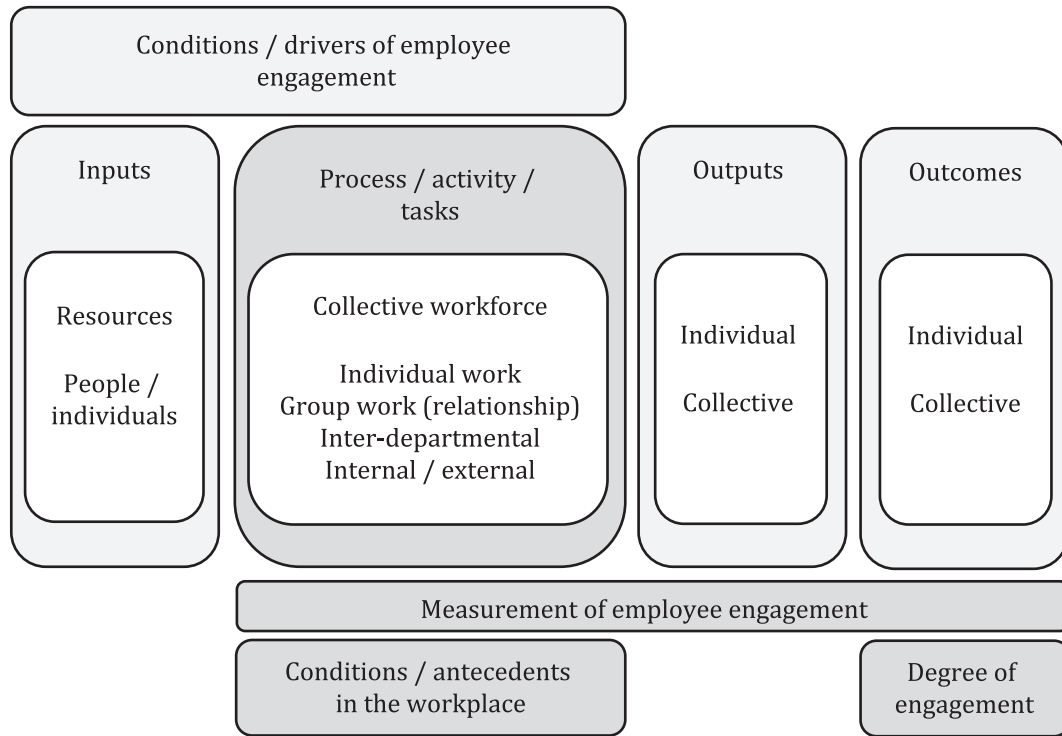


Figure 2 — Employee engagement within input, process, output and outcome model

## 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.