

Searching For Goldilocks:

What To Consider In Data Sharing Protocols That Achieve The *Just Right* Balance Of Transparency, Utility, And Confidentiality

Tutorial presented at the annual conference of the
International Personnel Assessment Council

held in Washington, DC

July 2023

Session Goals and Background

We hope to open a discussion, further understanding, and provide hands on experience with:

- relevant concerns regarding human resources, esp. diversity related data;
- the nature of user interest in data;
- considerations for data governance;
- recommendations on handling data;
- communication methods promoting data use; and
- practical application.

Who are we?

Martha E. Hennen, Ph.D., is a Personnel Psychologist with a large federal financial regulator based in Washington, DC. She currently serves as the Accreditation Chair; she is a Past President and Board Member for IPAC.

Tamara A. Bruce, M.A., is the Branch Director of the Data Analytics Branch of the Office of Equity, Diversity, and Inclusion at the National Institutes of Health (NIH). Her primary interests among social science topics have been the harassment and discrimination of individuals that possess multiple protected characteristics.

Tom Krenzke is a Vice President and Senior Statistical Fellow in Westat's Statistics and Data Science Division. Mr. Krenzke leads research in sample design, statistical confidentiality, small area estimation, variance estimation, imputation, nonresponse bias, and non-probability sampling.

Jordan Robbins, Ph.D. is the Branch Chief of the People Analytics Branch within CBP's Strategic Transformation and People Analytics Division. He oversees a team of statisticians and data scientists responsible for developing quantitative and qualitative methods to collect, validate, analyze, and display corporate data to improve human capital and workforce intelligence and aid in decision making at all organizational levels.

Seema Sayala, Ph.D. is a Research Psychologist in the People Analytics Division at the National Geospatial-Intelligence Agency (NGA). She leads survey data collection, analysis, and results reporting related to new employee hires and employee turnover and works on measuring employee engagement within the agency.

Gregory J. White is a Management and Program Analyst located in the Enterprise Workforce Planning unit of a federal financial regulator. He collects, analyzes, and reports on various forms of human capital data. This work includes DEI analysis, separation probability analysis, survey data collection and analysis, and position management review among other things.

What led us to this tutorial?

- Panel members involved in different aspects of data science, reporting, and analysis
- Focus in various ways on workforce demographics and people analytics
- Balancing need for enough data to persuade and inform while protecting the individuals who entrust us with their information



**Goldilocks –
*Just Right!***

What do you do when guidance is unavailable or out of date?

Where did we look?	What did we find?
Existing policy	limited details to provide for clarity
Older guidance but Emerging law/regulation	rapidly changing landscape, recent changes to law, regulation
Greater awareness/interest	growing concerns among data providers and users
More data available than ever	Explosion of data capture, availability, granularity, storage, and retrieval
Search of the literature	conflicting research advice and terminology

1. **Phone a friend**
2. **Use your best judgment – Figure it out**
3. **“Let it be a challenge to you”**

PRESENTATIONS

- *Privacy Preserving Data Processing*
- *Practical Examples for Data Masking and Data Sharing*
- *Data Confidentiality: Real World Considerations*
- *Policy development*

Without further ado....