



A Rebuilding the Foundations Resource

Template: Monitoring Equality and Diversity

South West Museum Development's Annual Survey of Museums data shows that many museums do not currently monitor the diversity of their voluntary workforce. By gathering this information consistently, analysing it and comparing data year on year, museums can set appropriate goals for Equality, Diversity and Inclusion - actions to increase the diversity of the workforce. Funders and stakeholders may want to see organisational commitment to understanding workforce diversity. Gathering this information needs careful consideration, planning and resource commitment at governing body level. The commitment needs to be maintained to effectively track trends in workforce diversity.

This resource provides a sample diversity monitoring survey that you might ask new volunteers to complete to help you to monitor the diversity of your workforce. (You may also want to consider using these questions to monitor the diversity of current volunteers and your paid workforce, if you do not already do so, or your audience for specific services or programmes.)

When carrying out diversity monitoring surveys, it's important to take the time to explain:

- why you are seeking the information
- what you will do with it
- how you will ensure that it remains anonymous, as this may be a key concern for participants
- that completion is voluntary

[This is a template. Adapt this document to correspond to your own policies and working practices]

[Insert organisation name] strives to be an inclusive organisation and is determined to meet the aims and commitments in our Equality, Diversity and Inclusion *[or equivalent policy name here]* policy, in line with the [Equality Act 2010](#). The policy includes specific commitments to increasing the diversity our visitors and users and to nurturing a workforce that reflects the diversity of our communities and users.

You can help us by completing this form. If you prefer not to answer a question, then please select that option when filling in your form.

The information we collect is processed in accordance with General Data Protection Regulations (GDPR) and any other applicable data protection legislation in the UK. No third parties will be given access to the personal information provided unless we are required by law to do so. For more information explaining how we use your data please read our privacy policy and data protection policy [\[link to your policy document locations here\]](#).

Your role within the organisation [\[For surveys that cover all parts of the workforce\]](#)

Please circle which applies to your primary role within the organisation

- Permanent staff
- Contractual staff
- Volunteer
- Board Member

Age

Please tell us which age bracket you fall into

- 0 - 19
- 20 - 34
- 35 - 49
- 50 - 64
- 65+
- Prefer not to say

Disability

The Equality Act 2010 defines disability as 'a physical or mental impairment which has a substantial and long term effect on a person's ability to carry out normal day to day activities'. It also covers people who have been diagnosed with HIV, cancer or multiple sclerosis.

(Definitions: 'substantial' means more than minor or trivial; 'long-term' means that the effect of the impairment has lasted, or is likely to last, for at least 12 months; 'normal day-to-day activities' include everyday things like eating, washing, walking and going shopping.)

Do you consider yourself to have a disability, impairment, learning difference or long-term condition?

- Yes
- No
- Prefer not to say

If yes, what best describes your disability, impairment, learning difference or long-term condition?

- Two or more impairments and/or long-term conditions
- A specific learning difference such as dyslexia, dyspraxia or AD(H)D
- General learning disability (such as Down's syndrome)
- A social/communication impairment such as Asperger's syndrome/other autistic spectrum disorder
- A long-standing illness or health condition such as cancer, HIV, diabetes, chronic heart disease or epilepsy
- A mental health condition, such as depression, schizophrenia or anxiety disorder
- A physical impairment or mobility issues, such as difficulty using arms or using a wheelchair or crutches
- Deaf or serious hearing impairment
- Blind or a serious visual impairment uncorrected by glasses
- A disability, impairment, learning difference or long-term condition that is not listed above
- Prefer not to say
- Prefer to self-describe: _____

Ethnicity

Question: What best describes your ethnic group? [Please tick one only]

Asian/Asian British

Bangladeshi Chinese Indian Pakistani Prefer not to say

Any other Asian background please specify here _____

Black/ African/ Caribbean/ Black British

African Caribbean Prefer not to say

Any other Black/African/Caribbean background, please specify here _____

Mixed/multiple ethnic groups

White and Asian White and Black African White and Black Caribbean

Prefer not to say

Any other mixed background, please specify here _____

White

British Gypsy or Irish Traveller English Irish Northern Irish

Scottish Welsh Prefer not to say

Any other white background, please specify here _____

Other ethnic group

Arab Prefer not to say

Any other ethnic group, please specify here _____

Prefer not to say ethnic background

Not known

Gender

What is your gender?

- Male
- Female
- Non binary
- Prefer not to say
- Not known

Sexual orientation:

Which of the following best describes your sexual orientation?

Only complete this section if you are aged 16 years old and over.

- Heterosexual or Straight
- LGBT
- Not known
- Prefer not to say

Religion

What best describes your religion or belief?

- Buddhist
- Christian
- Hindu
- Jewish
- Muslim
- Non-religious (atheist, humanist etc.)

- Sikh
- Prefer not to say
- Prefer to self-describe: _____

Socio-economic background

What was the occupation of your main household earner when you were aged about 14?

- modern professional and traditional professional occupations *such as teacher, nurse, physiotherapist, social worker, musician, police officer (sergeant or above), software designer, accountant, solicitor, medical practitioner, scientist, civil engineer or mechanical engineer*
- senior, middle or junior managers or administrators such as finance manager, chief executive, large business owner, office manager, retail manager, bank manager, restaurant manager, warehouse manager
- clerical and intermediate occupations *such as secretary, personal assistant, call centre agent, clerical worker, nursery nurse*
- technical and craft occupations *such as motor mechanic, plumber, printer, electrician, gardener, train driver*
- routine, semi-routine manual and service occupations *such as postal worker, machine operative, security guard, caretaker, farm worker, catering assistant, sales assistant, HGV driver, cleaner, porter, packer, labourer, waiter or waitress, bar staff*
- long-term unemployed (*claimed Jobseeker's Allowance or earlier unemployment benefit for more than a year*)
- small business owners who employed fewer than 20 people *such as corner shop owners, small plumbing companies, retail shop owner, single restaurant or cafe owner, taxi owner, garage owner*
- other (*such as retired/this question does not apply to me/I don't know*)
- Prefer not to say

Thank you for taking the time to complete this survey.

Links to further guidance for developing diversity monitoring

Arts Council England diversity data reports:

<https://www.artscouncil.org.uk/our-data/diversity-data>

Home Office guidance on equality legislation:

<http://www.homeoffice.gov.uk/equalities/equality-act/>

Social Mobility Commission Employers toolkit:

<https://www.gov.uk/government/publications/socio-economic-diversity-and-inclusion-employers-toolkit/employers-toolkit#socio-economic>