

EQUALITY AND DIVERSITY MONITORING GUIDANCE AND FORM



EXECUTIVE SUMMARY

Why?

We want to make sure that our residents and staff are getting fair treatment and access to services. For example do older or younger people feel more satisfied with what we do or do we have more complaints about services from a particular black and minority ethnic group? The law also requires us to collect this information in certain areas and there is best practice for areas not covered by the statutory requirements.¹

Any information we collect should be relevant to what we need to know. We need to decide what it is we are trying to find out and why. That will shape the type of monitoring questions used and also the format chosen in which to carry out monitoring (i.e. anonymous survey, accompanying but detachable monitoring form or asking direct). If you are not sure what you are using the information for then don't ask for it until you know. Where possible we should not ask the same customers and staff to feed back each time. We should use systems such as SAP and FLARE where we can.

When?

You must think carefully about when, how and why you need to ask questions about equality and diversity and we find that a common sense approach is always best!

Remember there may be times when it is not appropriate to ask our staff or customers for this information, for example when they are going swimming or need a bin collection query sorted out.²

If you are asking some of the questions in our standard and not others then it may be better to ask for this to be filled in later or use a sampling approach. If you are making a specific enquiry about a particular diverse community accessing your services e.g. women only swimming groups and the associated faith, belief or religion that may be associated with that then it may make the ethnicity area less relevant.

There are other times where we can and should ask for the full range of information either verbally or on a form (such as in a planning application) or when doing customer satisfaction surveys. It is essential that the information you collect is anonymised and kept confidential.

¹ Trans: <http://www.pfc.org.uk/node/1408>;

Sexual Orientation: <http://www.stonewall.org.uk/workplace/1473.asp#monitoring>

² Services like this should though consider if they can do other sorts of service user monitoring such as postal surveys or intermittent occasional samples that are repeated at set intervals.

How?

We must always be clear about why we are asking the questions and how this will benefit the person or diverse communities of interest and our customers need to know this right from the start.

If you are asking monitoring questions face to face, the questions should be open ended. It is essential that the customer decides the category and we should not make assumptions for them or complete the form on their behalf.

Our Social Inclusion Unit (SIU) has carefully chosen the categories in the standard for a number of reasons. Some contain information we need to compare with the census. Others are based on best practice guidelines. You should where possible keep to these core standards.

The gender and sexual orientation questions in particular should not be altered as transgender must not be confused with sexual orientation. You can extend the categories for your own use, and if you decide to do this then you need to fit the responses you get into the broader headings so we can compare like for like across our departments.

If you are adding our standard to written documents, you should start the page with:

“So we can make sure our services are fair and accessible we would like to find out more about you. Would you please take some time to complete the following questions? We will keep your information safe and secure.”

Don't forget, the standard is not obligatory to complete so please make sure that the customer does not feel they must complete it.

Some suggested questions when speaking to customers face to face:

- What age (or age group) are you?
- Can you tell me your gender within the categories I have on the form? (or read them out)
- How do you describe your sexual orientation?

Please don't read out all the categories unless the person asks for or needs it.

Responses...

Don't be embarrassed if people are not clear about their answers. This is because the meaning of terms such as 'ethnic origin' or 'race' is not necessarily clear to everyone. People may talk about their nationality (where they are born) rather than their ethnicity (the cultural background they consider they have). If someone says 'British' then you will need to ask more as there are a range of ethnicities within that nationality.

Don't worry about asking about customer's sexual orientation. Stonewall says that: "Monitoring sexual orientation plays an important part not only in being able to identify good or poor practice, improving the experience of individuals where applicable, but also in demonstrating to individuals from minority groups that they also matter in a majority culture."

So it is important that we do ask this question when we can.

Remember most people are proud of who they are and are usually happy to tell you about themselves. Our experience overall is that very few people object to telling you their equality and diversity categories. Just remember that if a person objects to the questions, then do not ask them or push them to answer.

Would you like to know more?

Please contact the Social Inclusion Unit by email on inclusion@plymouth.gov.uk or call (30)4321. You can also contact your departmental Corporate Equality Group (CEG) representative.

EQUALITY AND DIVERSITY MONITORING FORM

What is your age?

Under 16:

17 to 18:

19 to 50:

51 to 65:

66 to 75:

76 and over:

Gender

Male:

Female:

Do you consider yourself as Transgender? Yes: No:

Do you consider yourself any other gender identity? If so, please give details. Details:

Prefer not to say:

Do you consider yourself a disabled person?

Yes: No: Prefer not to say:

What is your sexual orientation?

Gay man: Hetrosexual/straight: Bisexual:

Gay woman/lesbian: Other: Prefer not to say:

How would describe your faith, belief or religion?

Buddhist: Jewish: Christian (Including Church of England, Catholic, Protestant and all other Christian denominations):

Muslim: Hindu: Sikh:

None: Prefer not to say: Other:

What is your marital status?

Single: Married: Civil Partnership:

Dependents

Are you pregnant?: Yes: No:

Are you currently on maternity/paternity leave? Yes: No:

Do you have children under 16? Yes: No:

Do you have children over 16? Yes: No:

Do you consider yourself as a carer for a relative or friend? Yes: No:

Ethnicity

White

British:

Gypsy or Traveller:

Irish:

Any other white background:

Mixed

White and Black Caribbean:

White and Black African:

White and Asian:

Any other mixed background:

Asian or Asian British

Bangladeshi:

Indian:

Pakistani:

Any other Asian background

Black or Black British

African:

Caribbean:

Any other Black background:

Chinese or other Ethnic group

Chinese:

Kurdish:

British Kurdish

Any other Chinese or other Ethnic group background:
