Diversity, Equity and Inclusion (DEI) monitoring form

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| **Please note this document is a sample only, and can be used to know what you can expect from the online DEI monitoring form.**  The online DEI monitoring form is split into five sections:   * Page 1: Guidance for completing the form * Page 2: Project Aim * Page 3: What specific groups your project is supporting or targeting * Page 4: Leadership of your Organisation * Page 5: Mission of Organisation |

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# Page 1: Guidance for completing the DEI form

## Why we're asking these questions

We believe that understanding and making progress towards Diversity, Equity and Inclusion (DEI) will be critical in helping us create a fairer, more inclusive society, and ultimately make us better funders. As part of this, we’re gathering data about organisations who apply for our funding to help us identify and address structural inequity, and ensure that the reach of our funding and our funding practices are fair and just.

## What we want to know

* **Who your project is supporting or aimed at** – including whether your work is aimed at a specific group or groups of people. By this, we mean that 75%\* or more of the people receiving support or who are intentionally being targeted share a particular identity or lived experience.
* **Your organisation’s leadership (the key decision-makers)**– we want to know whether 75% or more of the Board/Management Committee AND 50% of senior staff share a particular identity or experience, where staff exist.
* **Your organisation’s mission**– we want to know if any specific groups or communities are included in your constitution.

*\*This figure of 75% - or 3 in 4 people - was decided on after working with a wide range of groups. We know this can only be an****estimate****. You can use the free text box at the end of each section to include any other information you would like to share.*

## How we'll use your information

We will use this information to better understand the organisations applying for our support and who it's reaching. This will inform our funding strategy and how we can improve our funding practice.

We will also use it to share information about the impact of our funding. And when publishing information about grants we have awarded on websites like [360Giving's GrantNav](https://grantnav.threesixtygiving.org/), data shared about who the project is supporting, the organisation's leadership and the organisation's mission will be included in the grant details.

## Completing this form

We are using the [DEI Data Standard](https://www.funderscollaborativehub.org.uk/dei-data-standard), a shared framework that spells out the different categories that will enable funders to collect data in a systematic way.

Whilst this form uses a number of specific categories and sub-categories, we know there may be identities or experiences not included. For this reason, we have also included a free text option under ‘lived experience’. Where you have selected 'other' in any of the categories, you can use the 'lived experience' box to be more specific.

After selecting a category, there may be an option to select a sub-category. For instance, if 75% or more of the people your project is aimed at are Black, you would select the category ‘Communities experiencing racial inequity’ and then the sub-category ‘Black/African/Caribbean/Black British’. If your group are all communities experiencing racial inequity, you can select 'All communities experiencing racial inequity'.

If more than one category applies, you can select up to two sub-categories. There is also an option for ‘Prefer not to say’ if there is a specific group that applies but you would prefer not to say what that is.

And at the end of each section, there is a free text box for any other relevant information you would like to share. Information entered into this box will not be published on any websites or publications about your organisation.

Please note this form should take 10-15 mins to complete. Thank you in advance for completing it.

# Page 2: Project Aim

We want to know if the people your project is supporting or targeting share a particular identity and/or experience(s). And if they do, we'd like to know what those shared characteristics are.

By this we mean that **75% or more of the people supported or being targeted**by your project share a particular identity and/or experiences. You can choose more than one in the categories below. But please note that 75% or more of the people your work supports should share these identities and/or experiences.

For example, if the people you’re supporting is made up of at least 75% female refugees, this would qualify as supporting a specific group: women who are refugees. So they would fall under two categories:

* ‘Women and girls'
* ‘Migrants’ and then the sub-category ‘Refugees’

You'll be able to specify what categories apply on the next page. You can also select **‘prefer not to say’.**

If your project isn’t aimed at specific groups of people, you can choose that option below and you will go to the next section, which is about the leadership of your organisation.

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| **Question** | **Answer** |
| Is your project aimed at specific groups of people? | Choose from:   * My project is aimed at a specific group of people * My project is open to everyone and is not aimed at a specific group of people   If choosing the first option, after clicking ‘Next Page’, you’ll be taken to Page 3. Choosing the second option, will take you straight to Page 4. |

# Page 3: What specific groups your project is supporting

If you chose ‘My project is aimed at a specific group of people’ on the previous page, you will be taken to this page where you can select which categories and sub-categories are relevant to the specific group of people your project is supporting or targeting.

[See the full list of categories and sub-categories](#_Categories_and_sub-categories).

# Page 4: Leadership of your Organisation

This page is about the leadership of your organisation, and whether most of the people who lead or make key decisions share a particular identity or experience(s).

By this we mean: 75% or more of the Board/Management Committee AND 50% of senior staff self-identify as being from the same specific community or sharing the same identity(ies) and/or experience(s). You can choose more than one in the categories below. But please note that 75% or more of the people your work supports should share these identities and/or experiences.

For example, if your leadership consists of more than 75% young adults (typically young people aged 16-25) with care experience, they would fall under two categories:

* ‘Older and younger people’ and then the sub-category ‘Young adults’
* ‘Lived experience’ and then specify ‘care experience’ in the free text box

You can also choose ‘Prefer not to say'.

If none of the categories apply, you can choose 'Our leadership doesn’t consist of a specific group of people’.

Please note: If you select 'other' in any of the categories, you can use the 'lived experience' box to be more specific.

[See the full list of categories and sub-categories](#_Categories_and_sub-categories).

# Page 5: Mission of Organisation

This last page is about the Mission of your organisation. By this we mean any specific groups or communities that are included in your constitution.

If it does, tell us who they are - you can choose more than one category. If you select 'other' in any of the categories, you can use the 'lived experience' box to be more specific.

If it doesn’t, you can choose ‘Our mission is general and not to aid a specific group of people’.

You can also choose ‘Prefer not to say’.

[See the full list of categories and sub-categories](#_Categories_and_sub-categories).

# Categories and sub-categories

## Category: A local community

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| **Description** | **Sub-categories** |
| Geographical - a place/location (for instance, this could be a neighbourhood, town, region) | There are no sub-categories, but you will be able to specify further detail in a Free Text box that appears after checking the box. |

## Category: Communities experiencing racial inequity

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| **Description** | **Sub-categories** |
| Communities that experience inequity as a result of their race or ethnic group. Ethnic group refers to the group that people self-identify with, which may be related to their national/geographical origin, skin colours, and other identities. This is often referred to as “Black, Asian and Minority Ethnic” or BAME. | Choose one from the following (additional sub-categories are optional – again, you can only choose one option from these):   * All communities experiencing racial inequity * Black/African/Caribbean/Black British   + African   + Caribbean   + Any other Black/African/Caribbean background * Mixed   + White and Black   + White and Asian   + Any other Mixed / Multiple ethnic background * Asian/Asian British   + Indian   + Pakistani   + Bangladeshi   + Chinese   + Any other Asian background * Other Group experiencing ethnic or racial inequity   + Arab   + Jewish   + Gypsy, Roma and Traveller Communities   + Any other Ethnic group |

## Category: Disabled people

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| **Description** | **Sub-categories** |
| Self-identify as disabled, with particular impairments, which have a long-term impact on quality of life. | Choose one from the following (additional sub-categories are optional – again, you can only choose one option from these):   * Disabled People (All) * Physical Impairment   + Visual impairment / partial sight / sight loss   + Hard of hearing / deaf / hearing loss   + Speech impairment * Mental Health * Cognitive differences   + Learning disability   + Learning difficulty   + Neurodivergent |

## Category: Faith communities

| **Description** | **Sub-categories** |
| --- | --- |
|  | Choose one from the following:   * Faith * Catholic * Protestant * Other Christian denominations * Buddhist * Hindu * Jewish * Muslim * Sikh * Atheist * Agnostic * Other |

## Category: LGBT+ people

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| **Description** | **Sub-categories** |
| Lesbian, Gay, Bisexual and Trans + people | Choose one from the following (additional sub-categories are optional – again, you can only choose one option from these):   * All LGBT+ People * Bisexual people   + Bisexual men   + Bisexual women * Gay men * Lesbian / Gay women * Transgender people   + Trans men   + Trans women * Non-binary people * Other |

## Category: Migrants

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| **Description** | **Sub-categories** |
| Groups who are first generation and/or recent migrants to the UK | Choose one from the following:   * Migrants * Asylum seekers * Refugees * Undocumented People * Other Migrants |

## Category: Older or younger people

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| **Description** | **Sub-categories** |
| A specific age group | Choose one from the following:   * Older People (typically those aged 60 and over) * Young adults (typically those aged from 16 to 25) * Young people (typically those aged from 8 to 25) * Children and Young People (typically those aged under 26) * Children (those aged under 16) * Infants (those aged under 2) |

## Category: People who are educationally or economically disadvantaged

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| **Description** | **Sub-categories** |
| Self-identify as from an economically and/or educationally disadvantaged background, including working class backgrounds, with long-term impact on their life outcomes; also people currently experiencing financial hardship. | No additional sub-categories to choose from. |

## Category: Women and girls

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| **Description** | **Sub-categories** |
| Those who identify and live as women and girls. | No additional sub-categories to choose from. |

## Category: Welsh Language Speaking

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| **Description** | **Sub-categories** |
| For projects based in Wales | No additional sub-categories to choose from. |

## Category: Community background

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| **Description** | **Sub-categories** |
| For projects based in Northern Ireland: community background could be Protestant, Catholic or neither. | Choose one from the following:   * The Protestant community * The Catholic community * Neither |

## Category: Lived Experience

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| **Description** | **Sub-categories** |
| Lived experience that may not already be reflected in other categories and sub-categories in this form (for example: long-term unemployment, care experience, criminal justice system). | There are no sub-categories, but you will be able to specify further detail in a Free Text box that appears after checking the box. You will have up to 1000 characters. |