

Collecting Diversity and Inclusion Data

This resource has been designed by [Tech Talent Charter \(TTC\)](#) with input from business leaders, HR professionals and Diversity and Inclusion (D&I) experts from amongst the TTC Signatory base.

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- What is this resource and who is it for?
- Template survey/suggested survey questions
- Guidance and advice from companies who are already collecting D&I data
- Challenges to data collection that you should consider along with suggested approaches/solutions

Introduction to the survey template

The purpose of this template is to give small to medium size companies that do not yet have a mature data collection process on diversity characteristics, a starting point and some advice on how to get started with collecting this type of data from employees. In this guide we include question wording you may wish to ask, as well as guidance notes on how to go about enacting this type of data collection successfully, taking into account common challenges around disclosure reluctance or opposition.

We are hearing that when it comes to diversity data collection, more and more companies are asking for this information at the point of hire. If data collection is new to your organisation, you may want to send out a survey to existing staff. We strongly encourage organisations to consider at which point in an employee lifecycle you could make data collection part of your people process, so that data collection becomes consistent.

Planning and positioning your employee survey

6 key considerations before you design your survey and collect data:

1. **Consult legislation in your region before using this template to ensure that the data collection you are undertaking is legal and advisable.**

We urge you to do this because some questions that may be legal to ask in some regions may be illegal to ask in others. We have designed this template from a UK-centric point of view but have endeavoured to provide options for other regions where possible. We will also add alternative questions and sections to the Annex of this document to cater for specific geographies as we source them.

2. **Be completely clear and explicit about who is going to receive the respondents' data and why.**

In all communications about your data collection and on the survey itself, state how the data will be managed. Will it be collected and stored internally or externally by a third party? Once you have the data, what questions will you specifically aim to answer with it, and why? If you intend to delete the data after use, how will you ensure no data footprint remains? How will you explain the level of protection/data security risk to your employees? If HR collects and manages the data, this may provide reassurance to employees. However, internal HR involvement can also have a chilling effect if employees feel data gathering is connected to any type of

disciplinary, role change decisions or allocation of company resources that works against them. Alternatively, you may opt to use an external provider to collect and analyse the data to reassure your staff. Ultimately, you should communicate your plans and processes with transparency and consistency at all times.

3. What data do you actually need?

Decide upfront on what information your business needs before you design your survey. Only collect data that is truly necessary. If you ask questions, but then do not use data from these responses to inform business action that your employees can see, it will undermine trust in your intentions and efforts in future.

4. Who will design and send out the survey?

It's not advisable to have interest groups designing and sending out surveys. It may be well intentioned but it can create difficulties and risks for the organisation; the accountability for this job is best held by professionals in an HR function or by a specialised external provider.

5. Do you intend to keep longitudinal data or a temporarily held snapshot?

Whilst maintaining data over time allows you to measure change, it can still be misleading. For example, mergers and acquisitions can distort statistics. Similarly, if your organisation's headcount is relatively small, your stats will be more prone to volatility based on just a few individuals. Therefore longitudinal data may not be necessary or helpful to collect.

6. Will your data collection be mandatory or optional?

If you make data collection optional, you will inevitably have an inaccurate dataset with higher participation in certain groups than others. Therefore it is crucial to make your data collection as thorough as possible. If you choose to make the questionnaire mandatory, you must ensure your survey allows people to select an option like "I prefer not to answer" for all questions. If you instead choose to make your survey optional, you should ensure that reported insights are contextualised as being from an incomplete dataset. With the latter, you should focus on obtaining the highest response rate possible and you may also want to define and communicate a response rate threshold before any data is used for business insight.

7. Adapt the contents of this template to suit your organisation.

This survey template has been written with the intention that it can be used by as many organisations as possible; however, you should always tailor your survey to suit your organisation's unique circumstances.

Survey questions

We advise that in the introduction to your survey, you tell the respondent how long the survey is expected to take.

Section 1: Segmentation questions

We have included a set of questions which will enable you to segment your responses by a few commonly used categories. Be careful to only ask these questions if your workforce is large enough that segmenting by any of these answers would not compromise anonymity. Some of the TTC's Signatories have advised us that they do not report any cuts of the data (including internal reporting) unless the sample of that segment is 11 responses or greater. You may also find you do not need to collect this information if it is already stored in your HR system.

What region are you based in?

Create a list of options based on your organisation. For example, our UK region list includes: London, South East, South West, East of England, West Midlands, East Midlands, Yorkshire and Humber, North East, North West, Scotland, Wales, Northern Ireland, I work remotely/there is no specific regional base associated with my job.

Which business function/team/department do you work in?

Create a list of options based on your organisation.

Do you manage other people in the business?

Yes or No selection

Section 2: Age

You may wish to leave this section out of your survey if you already have date of birth and age information in your HR system. We advise that if you choose to include questions about age, you use age brackets. This is because respondents may not feel comfortable specifying their exact age. We have adjusted the age brackets suggested below so that they overlay generational groups. This means you can group responses by generational groups such as Millennial, Gen Z, Boomers etc. This is accurate at time of writing. However, you may wish to alter and update these brackets depending on the emergence of new generational groups or based on the labour laws relevant to your organisation - for example if there is a lower or higher working age in your region compared to what is written here. Similarly you may wish to amend these age brackets so that they divide along the retirement age where you are. We have chosen to put the age question first because it is a question that people are likely to be familiar with and therefore might make for an easier starting point.

What is your age bracket?

Under 18
18- 25
26- 35
36- 45
46- 55
56- 64
65- 75
over 75

Section 3: Gender

“We are now going to ask about your gender identity. According to [Stonewall](#), a person’s gender identity is ‘a person’s innate sense of their own gender, whether male, female or something else, which may or may not correspond to the sex assigned at birth.’ We have drawn from Stonewall for the answer options to this question. How would you describe your gender?”

Woman/Female
Man/Male
Non binary / another gender
I self-describe my gender in another way [OPEN TEXT FIELD]
I do not wish to disclose my gender

Does your gender match the biological sex you were assigned at birth?

Yes
No
Sometimes
Prefer not to say

Do you identify as trans?

Yes
No
Sometimes
Prefer not to say

Notes about Gender:

We have used the wording “woman/female” and “man/male” as the answer options. D&I thinking in the UK uses the terms “woman” and “man” to refer to gender - whether a person identifies as a masculine person or a feminine person within society. Whereas, the terms “male” and “female” are used in the UK to indicate someone’s biological sex - the classification they were given on their birth certificate for example. However, the terms are often used interchangeably in common parlance and usage may vary between regions. Therefore we have included both in the answer options. Similarly, we have used the term “non binary” alongside “another gender”. “Non binary” refers to a person whose gender identity doesn’t categorise within the two options of woman/man. We have included “another gender” here as an alternative term to “non binary” to help make this option understandable to those who are not familiar with the term “non binary”.

Section 4: Orientation

‘Orientation’ is an umbrella term describing a person’s attraction to other people. These terms refer to a person’s sense of identity based on their attractions, or lack thereof. Orientations include, but are not limited to, lesbian, gay, bi, ace and straight. The options below have been drawn from the [Stonewall’s](#) glossary of terms. How would you describe your orientation?

Straight/Heterosexual
Gay/Lesbian
Bisexual
Ace
I prefer to self-describe my orientation in another way: [OPEN TEXT FIELD]
I do not wish to disclose my orientation

Notes about Orientation:

Please note that you should take care before using this section of the survey template. It is illegal to ask questions about someone’s orientation in certain countries.

We have used the single word “orientation” to refer to a person’s attraction to others. This is taken from Stonewall’s glossary of terms. Another common wording would be to use the term “sexual orientation”. However, orientation does not necessarily denote a sexual type of attraction so we have not included “sexual” in our wording.

Section 5: Ethnicity

We are now going to ask you about your ethnicity. According to [ONS guidance on ethnicity](#), there is no consensus on what constitutes an ethnic group, and membership is something that is self-defined and subjectively meaningful to the person concerned. What is your ethnicity?

The most appropriate answer options for this question will vary greatly from organisation to organisation. In order for the question to provide usable data, the level of detail in your categorizations should be proportionate to the expected numbers of respondents who will make use of each category. As above, categories should not undermine the anonymity of respondents. The options we list below are taken from the [UK government website](#). We have advised these categories because they will allow organisations in the UK to compare their UK ethnicity demographics to the averages for the

region, which will allow you to contextualise your findings. However, We have also included other categorisations in the appendix of this document if you wish to explore alternative categorizations.

Asian or Asian British
Black, African, Caribbean or Black British
Mixed or multiple ethnic groups
White
Any other ethnicity
I do not wish to disclose my ethnicity
I prefer to self-describe my ethnicity in another way: OPEN TEXT FIELD

Notes about Ethnicity

The ethnicity categories we have used are taken from the UK census and are therefore UK-centric categories. However, if you are using this survey in countries other than the UK, we advise you to use the ethnicity categories that make most sense to your region. We have added some additional example categories in our appendix which you may wish to explore and consider further dependent on your needs. This includes a more granular version of the categories used by the UK government.

Section 6: Disabilities, Health Conditions and Learning Differences

We are now going to ask you about any disability, including health or learning conditions you have. A person with a disability has a physical or mental impairment that has a substantial and long-term adverse effect on their ability to carry out normal day to day activities. A person with a learning difference, sometimes referred to as 'neurodivergence', learns and processes information differently to the majority of people. Health conditions refer to significant and long-lasting mental or physical illnesses that significantly affect someone's day to day life. Do you have a disability, health condition or learning difference?

Yes, I have an impairment (e.g. blind, deaf, learning disability, wheelchair user etc)
Yes, I have a learning difference (e.g. ADHD, autism, dyslexia, dyspraxia etc)
Yes, I have a long-lasting illness or health condition (e.g. cancer, HIV, diabetes, epilepsy, endometriosis etc)
Yes, I have a mental health condition (e.g. depression, an anxiety disorder, PTSD, schizophrenia etc)
No, I have no known impairments, learning differences, mental or physical health conditions or long-standing illnesses.
I prefer not to say

If you answered "yes" above, please describe the nature of your learning difference, health conditions, or impairment(s):
OPEN TEXT FIELD

Notes on disability, health conditions and learning differences:

We have opted for this wording for the following reasons: “Disability” is a globally recognised term and is used by the WHO. We have opted to use “disability” instead of alternatives such as “impairment” because there is a line of thought that avoiding the word “disability” can feed shame around being disabled.

In the UK, a long-term health condition falls under the category for legal protection as a disability if it has lasted more than 12 months so you may wish to define this specifically if it's relevant for your region. Similarly you may wish to add a more specific definition of disability that reflects the legal framework for your region as appropriate. Neurodivergent conditions, which include things such as ADHD or autism, are also covered by the term “disability” in UK law. We have mentioned them all specifically to prompt the respondent to mention such conditions, even if they do not identify with the term “disabled”.

If you are doing this survey amongst younger people, particularly children or those in education, you may also wish to add a question asking whether a person is currently in the process of having a disability assessment as this can sometimes be a lengthy process and people with disabilities which have not yet been formally assessed may be numerous in younger age groups.

As with all sections, consider regional norms before you determine the wording of your question. Whilst “disability” is a well-recognised global term, you may find neurodivergence and long term health conditions are defined differently and fall under different legal and social categorizations in other regions.

Section 7: Deeply-held religious or philosophical beliefs

We are now going to ask you about your beliefs. Would you describe yourself as having a deeply-held belief such as a religious belief or philosophical belief? Please select from the following options:

Atheism
Agnosticism
Buddhism
Christianity
Hinduism
Islam
Judaism
Sikhism
Another religious belief - please describe
Another non-religious belief - please describe
I do not have a deeply-held belief/belief system
I prefer not to disclose my beliefs

Notes on Religion/Deeply Held Belief

We have worded this section as “religion or deeply held belief” because beliefs beyond those of a religious nature are protected by the UK Equalities Act, such as ethical veganism and atheism. We have chosen to specify “deeply-held belief” because this may prompt the respondent to consider their religiosity i.e. their levels of adherence to their beliefs. This may elicit a different response to asking the respondent if they belong to a religion. The latter is more likely to see respondents reporting alignment to a religious group from either a passive or personal identity perspective, whereas the former is more likely to elicit responses from those who are engaged in the practices of their belief system. You should choose the question wording that best suits the type of information you are seeking. For more information you may wish to read this academic paper: [Measuring Religiosity in Surveys](#).

Please note that you should check the local legislation and guidance in your country before using this section of the survey. The categorisations here reflect common UK options but you may wish to consider other categories depending on your location. For example, Chinese traditional belief systems or African traditional religions may be appropriate to consider in their respective regions. You may also wish to segment into more distinct religious denominations within a broader religious group.

Section 8: Socio-Economic Background

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

Modern professional & traditional professional occupations such as, but not limited to: teacher, nurse, physiotherapist, social worker, musician, police officer (sergeant or above), software designer, accountant, solicitor, medical practitioner, scientist, civil / mechanical engineer.
Senior, middle or junior managers or administrators such as, but not limited to: finance manager, chief executive, office manager, retail manager, bank manager, warehouse manager, large business owner.
Clerical and intermediate occupations such as but not limited to: 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 but not limited to: postal worker, machine operative, security guard, caretaker, farm worker, catering assistant, sales assistant, HGV driver, cleaner, porter, packer, labourer, waiter/waitress, bar staff.
Small business owners such as but not limited to. employed less than 25 people; corner shop owners, small plumbing companies, shop owner, single restaurant or cafe owner, taxi owner, garage owner.
Long-term unemployed (claimed Jobseeker's Allowance or earlier unemployment benefit for more than a year).
Other such as but not limited to: retired, this question does not apply to me, I don't know.
I prefer not to say.

What type of school did you mainly attend between the ages of 11 and 16?

State-run or state-funded school - selective on academic, faith or other grounds
State-run or state-funded school - non-selective
Independent or fee-paying school, where I received a bursary covering 90% or more of my tuition
Independent or fee-paying school - no bursary
Attended school outside the UK
Don't know
Prefer not to say
Other:

If you finished school after 1980, were you eligible for Free School Meals at any point during your school years? FreeSchool Meals are a statutory benefit available to school-aged children from families who receive other qualifying benefits and who have been through the relevant registration process. It does not include those who receive meals at school through other means (e.g. boarding school).

Yes
No
Not applicable (finished school before 1980 or went to school overseas)
Don't know
Prefer not to say
Other:

Did either of your parents attend and complete a university degree by the time you were 14?

No, neither of my parents attended university
Yes, one or both of my parents attended university
Don't know
Prefer not to say

Notes on Socio-Economic Background

The UK's Social Mobility Commission recommends a set of four questions for use in determining the socio economic background of an individual in the UK. They recommend that if you can only ask a limited number of questions on this topic, it should be the first one listed above. They have an excellent toolkit available for free and it explains how to analyse the results of each of the four questions listed: <https://socialmobilityworks.org/toolkit/measurement/>

As socio-economic backgrounds vary significantly across borders, we recommend you use a different set of questions tailored to the region of your survey respondents. The questions above are tailored to the UK. However, you may find certain questions or elements of the questions translate well into other regions.

Making your survey as accessible as possible

To make your survey as accessible as possible, please provide other formats such as large print. Always use sans serif font and black text on a white background. Survey Monkey and SurveyGizmo are two that are accessible. These survey platforms offer an accessibility rating. Accessibility ratings are also available in Word or Excel too. See siteadvicefaq.org.uk for advice on this.

Making your survey short vs collecting enough information

Surveys need to balance between being short enough that respondents are willing to complete the survey and collecting enough information to provide valuable insight. If you feel you need to make your survey shorter, there are certain questions that you may be able to consider cutting out. For example, the Social Mobility Commission has recommended that if you can only ask one question to understand Socio-Economic background, the first one listed is the key one.

If you want deeper insight into any of the categories, but do not want to add additional length to your main survey, an alternative approach would be to have a question asking if the respondent would be willing to answer a subsequent survey in future on a specific topic, for example their ethnicity. This way individuals can opt in to providing further information. The upside to this will be that you can obtain further insights from a willing group of respondents. However, you should factor in that certain groups are more likely to feel willing to participate in research and therefore your subsequent sample might skew towards certain types of individuals or attitudes.

Appendix

Using a survey to understand the need for adjustments and accommodations around disability

The accepted language for changes that may need to be made to enable a person with a disability to work is "adjustments and accommodations". If you are going to have a survey to understand needs, you can ask this question, however, if you are just using this survey to collect a data snapshot of diversity in your organisation, then there is no need to have this question. However, if this survey is part of a new employee onboarding process for example, you may wish to ask for this information following the disability section of the survey. The question we have suggested for this is:

If you answered "yes" above, does your disability, health condition or learning difference affect your day-to-day experience at work?

Yes
No
I don't know
I prefer not to say

If you answered "yes" to the above, are there any adjustments and accommodations that could be made to better support you at work? [OPEN TEXT FIELD]

Ethnicity categorisations

Depending on your location, alternative ethnicity categories may be appropriate. Below are some common categories to consider. Please note this list is not exhaustive and we have not included it in the main document as it requires further research, but are sharing it in the appendix as food for thought.

Before defining ethnicity categories in your survey, please consider how effective they will be when you come to analyse your results. Categories must balance between not being too broad such that they disguise nuances between distinct ethnic groups and being broad enough to allow anonymous analysis and helpful categorization.

Some categories that you might wish to consider include, but are not limited to:

- Middle Eastern (including Arab nations, Central Asia and Southern Caucasus)
- Asian - South Asian (including but not limited to India, Bangladesh, Nepal, Bhutan, Sri Lanka, Maldives)
- Asian - East Asian (including China, Japan, Mongolia, Taiwan, North Korea, South Korea)

More granular version of the UK-based ethnicity categories:

White: English, Welsh, Scottish, Northern Irish or British, Irish, Gypsy or Irish Traveller, Any other White background.

Mixed or Multiple ethnic groups: White and Black Caribbean, White and Black African, White and Asian, Any other Mixed or Multiple ethnic background

Asian or Asian British: Indian, Pakistani, Bangladeshi, Chinese, Any other Asian background

Black African, Caribbean or Black British: African, Caribbean, Any other Black, African or Caribbean background

Other ethnic group: Arab, Any other ethnic group

Ethnicity categories which may be relevant to the Americas:

Latinx, Native Americans/American Indians, AAPI (Asian American and Pacific Islander).

Please consult local legislation and practice in your region to enable you to determine the most appropriate categorisations to use.

Questions? Get in touch at [Hello@techtalentcharter.co.uk](mailto>Hello@techtalentcharter.co.uk)