

## Guidance notes for organisations



We have produced this form with guidance notes to help you understand **why** we are recommending the use of certain questions and categories for equality monitoring forms. **This form and guidance has been updated in line with Census 2021 – which made changes to certain equality categories and how they are monitored.** Guidance notes also contain links to national and local data against which you can compare your data (e.g. Census 2021). Although we are using the 'Service Users' form as an example below, the guidance is relevant to all recipients (e.g. employees)

You can use this form to gather and analyse information about groups protected by the Equality Act 2010 in relation to:

- ✓ Their access to services: to check who is using your services and to explore if certain groups are under or overrepresented. For example: your money advice service is mostly used by young people although you have a large group of older tenants in poverty.
- ✓ Their outcomes: to check satisfaction rates for different groups or whether some groups are more likely to get a better service. For example: Lesbian, Gay and Bisexual tenants are less satisfied with customer service OR disabled tenants on average wait 5 times longer for a repair than non-disabled tenants.

You should not use this form to:

- ✗ Tailor services for an individual: for example, to ascertain their accessible communication needs, their need for home and office visits, their support or religious needs etc. This form does not ask these types of questions and should be used for statistical purposes only.
- ✓ However, you can add a section with the aim to tailor services if you explicitly state how such a section will be used and that it will be tied to the individual's name (in accordance with GDPR rules).

We have used current best practice and research from ONS and the Welsh Government to make sure you can compare your equality monitoring data with external sources (like Census).

We also welcome any feedback on the form in relation to how it could be improved or if you have faced any particular challenges or have good practice examples relating to the equality monitoring process in terms of form development, collection, recording and analysis.

Recommended categories are likely to change over time in line with best practice and we will update this document accordingly. To check you have the most recent versions, go to the members area of our website [www.taipawb.org](http://www.taipawb.org), phone 02920537630 or email [info@taipawb.org](mailto:info@taipawb.org). Copy of Census 2021 Questionnaire for Wales can be found [here](#)



It is important to include a section at the beginning of the form setting out why you are asking for equality monitoring information, what the information collected will be used for and to address any data protection considerations. Below you will find an example paragraph addressing these considerations. The paragraph only contains suggested wording and we would recommend drawing up a paragraph and testing it with your tenants/service users or a tenant reader panel if you have one. Stonewall Cymru produced a [useful leaflet](#) explaining why equality monitoring is important.

### Why we are asking you for this information (service users).

**[Name of your organisation]** wants to eliminate discrimination and promote equal opportunities. Collecting the following information can help us achieve this. We monitor and analyse diversity information to make sure that our processes are fair, transparent and promote equality of opportunity for all service users, tenants, and applicants. We want to know if everyone can access our services equally. Your cooperation enables us to plan and deliver services more effectively to individual tenants and service users. Any information on this form will be treated confidentially, in accordance with the General Data Protection Regulations and will be used for statistical purposes only. Our privacy notice will tell you more about how and why we use this information.

### Why we are asking you for this information (employees/applicants)

**[Name of your organisation]** is committed to recruiting and retaining a workforce that reflects our diverse communities. It is vital that we monitor and analyse diversity information so that we can ensure that we treat all staff and applicants fairly. Your cooperation enables us to make sure that we attract and retain a diverse and effective workforce. Any information on this form will be treated confidentially, in accordance with the General Data Protection Regulations and will be used for statistical purposes only (unless stated otherwise in the application form). Our privacy notice will tell you more about how and why we use this information.

## 1. How would you describe your ethnic group? (Please tick)

### White:

- ☐ Welsh, English, Scottish, Northern Irish or British
- ☐ Irish

- ☐ Gypsy or Irish Traveller
- ☐ Roma
- ☐ Any other white background, please write in: \_\_\_\_\_

**Mixed or multiple ethnic groups:**

- ☐ White and Black Caribbean
- ☐ White and Black African
- ☐ White and Asian
- ☐ Any other mixed or multiple background, please write in: \_\_\_\_\_

**Asian, Asian Welsh or Asian British:**

- ☐ Indian
- ☐ Pakistani
- ☐ Bangladeshi
- ☐ Chinese
- ☐ Any other Asian background, please write in: \_\_\_\_\_

**Black, Black Welsh, Black British, Caribbean or African**

- ☐ Caribbean
- ☐ African background, write in below
- ☐ Any other Black, Black British, or Caribbean background, please write in: \_\_\_\_\_

**Other ethnic group:**

- ☐ Arab
- ☐ Any other ethnic group, write in: \_\_\_\_\_
- ☐ Prefer not to say

**2. How would you describe your national identity? (Please tick)**

- ☐ British
- ☐ Welsh
- ☐ English
- ☐ Scottish
- ☐ Northern Irish
- ☐ Other, please write in: \_\_\_\_\_
- ☐ Prefer not to say



With every question, it is important to include an option that enables people to opt out from answering the question. It is important when recording the information that it is recorded as 'prefer not to say' and not as a 'no response' or blank answer – as the

service user/ tenant has responded but does not want to provide this information.

### 3. What is your sex?

- ☐ Female
- ☐ Male
- ☐ Other, please write in: \_\_\_\_\_
- ☐ Prefer not to say



Categories follow those set out in the Census 2021, with additional categories of Other, please write in and Prefer not to say). Please note: 'Transgender' should not be used as a category here. Gender identity information should be captured in a separate question as advised by good practice.

Using these categories will assist you in comparing against Census data and other data sources

Some equality organisations such as The Equality Challenge unit recommend the inclusion of an additional category of 'other' as it is deemed appropriate for people who associate with the terms/labels intersex, androgyne, intergender, ambigender, gender fluid, polygender, gender queer and others.

Please note [Census 2021 guidance](#) for the question on sex.

### 4. Is your gender you identify with the same as your sex registered at birth?

- ☐ Yes
- ☐ No, please write in gender identity \_\_\_\_\_
- ☐ Prefer not to say



Categories follow those set out in the Census 2021, this is a new addition and not previously asked. There is a risk that some people won't understand the question so it is important that staff are given sufficient training to enable them to explain the question in an appropriate manner.

Stonewall [produced a report](#) which contains other information and suggestions for monitoring gender identity. If you are collecting information on Gender Identity it is important to be mindful of your obligations under the Gender Recognition Act 2004 around confidentiality.

## 5. Which of the following best describes your sexual orientation?

- ☐ Straight / Heterosexual
- ☐ Gay or Lesbian
- ☐ Bisexual
- ☐ Other sexual orientation, please write in: \_\_\_\_\_
- ☐ Prefer not to say



Provide one option (Lesbian/Gay), rather than two, and then cross-reference the results with their data on gender in order to examine differences in experiences between gay men and gay women.'

Welsh Government guidance recommends that this question is only asked of those people aged 16 and over

## 6. What is your age group?

- |                                      |                                  |                                    |  |                                  |
|--------------------------------------|----------------------------------|------------------------------------|--|----------------------------------|
| <input type="checkbox"/> 15 or under | <input type="checkbox"/> 16 – 24 | <input type="checkbox"/> 25 - 34   | <input type="checkbox"/> 35 - 44           | <input type="checkbox"/> 45 - 54 |
| <input type="checkbox"/> 55 - 64     | <input type="checkbox"/> 65-74   | <input type="checkbox"/> 75+ years | <input type="checkbox"/> Prefer not to say |                                  |



These are only suggested age bandings based on Welsh Government standards. You may want to amend them so that they reflect the age profile of the services you provide e.g. if you provide older persons accommodation you may want to include for example the following categories 75-84, and 85+. This is because Census 2021 only asks about date of birth and age is calculated automatically. If your systems allow for this, you may want to ask about data of birth, however, please note that you need appropriate GDPR protections in place to retain anonymity for respondents.

**7. What is your legal marital or registered civil partnership status?**

- ☐ Never married and never registered a civil partnership
- ☐ Married
- ☐ In a registered civil partnership
- ☐ Separated, but still legally married
- ☐ Separated, but still legally in a registered civil partnership
- ☐ Divorced
- ☐ Formally in a civil partnership which is now legally dissolved
- ☐ Widowed
- ☐ Surviving partner from a registered civil partnership
- ☐ Prefer not to say

**8. How is your health in general?**

- ☐ Very good
- ☐ Good
- ☐ Fair
- ☐ Bad
- ☐ Very bad
- ☐ Prefer not to say

**9. Do you have any physical or mental health conditions, illnesses or impairments lasting or expected to last 12 months or more?**

- ☐ Yes
- ☐ No
- ☐ Prefer not to say

**10. Do any of your conditions, illnesses or impairments reduce your ability to carry out day to day activities?**

- ☐ Yes, a lot
- ☐ Yes, a little
- ☐ Not at all
- ☐ Prefer not to say



The above question follows the format of the question found in the Census 2021, however we have added the word impairment to tie it more closely with the social model of disability. (e.g. a disabled person may not necessarily see their impairment as a condition or illness). See Guidance here [Social Model - Disability Wales](#)

**11. It helps us to know whether we are reaching all disabled people. If you ticked 'Yes' above please can you tick the relevant box(es) below. You are welcome to tick more than one box if appropriate.**

- ☐ Deafness or hearing impairment
- ☐ Blindness or vision impairment
- ☐ Physical disability/ impairment or mobility issues
- ☐ Learning disability
- ☐ Learning difficulty, such as dyslexia
- ☐ Mental health condition, such as depression or schizophrenia
- ☐ Social/ communication impairment such as Asperger's syndrome/other autistic spectrum disorder
- ☐ Long term health condition, such as cancer, HIV, diabetes, chronic heart disease or epilepsy
- ☐ A disability, impairment or medical condition that is not listed above, please write in \_\_\_\_\_
- ☐ Prefer not to say



Because disabled people will face different barriers to accessing services depending on the nature of their impairment, you may choose to include this additional question. This is so you can see whether people with particular impairments are accessing your service or not. For example, your tenancy support service may be widely accessed by

- people with mental health conditions but not so much by people with visual impairments (also remember that people may have multiple disabilities.)

**12. Do you look after, or give any help or support to anyone because they have long term physical or mental health conditions, illnesses, impairments or problems related to old age?**

- ☐ No
- ☐ Yes, 9 hours a week or less
- ☐ Yes, 10-19 hours a week
- ☐ Yes, 20-34 hours a week
- ☐ Yes, 35-49 hours a week
- ☐ Yes, 50 or more hours a week
- ☐ Prefer not to say



Carers are protected under the Equality Act 2010 through discrimination by association provisions. The question and categories used follow those used in the Census 2021.

### 13. What is your religion?

- ☐ No religion
- ☐ Christian (all denominations)
- ☐ Buddhist
- ☐ Hindu
- ☐ Jewish
- ☐ Muslim
- ☐ Sikh
- ☐ Any other religion please write in \_\_\_\_\_
- ☐ Prefer not to say



Using these categories will assist you with comparing against Census data for religion

### 14. Can you understand, speak, read or write Welsh? (tick all that apply)

- ☐ Understand spoken welsh
- ☐ Speak welsh
- ☐ Read welsh
- ☐ Write welsh
- ☐ Or None of the above
- ☐ Prefer not to say



This question will govern how you implement and embed the Welsh Language Policy.

**15. What is your main language?**

- ☐ English
- ☐ Welsh
- ☐ Other, write in (including British Sign Language) \_\_\_\_\_
- ☐ Prefer not to say

**16. How well can you speak English?**

- ☐ Very well
- ☐ Well
- ☐ Not Well
- ☐ Not at all
- ☐ Prefer not to say



Collecting data on customers main language will help shape service and improve customer engagement and experience.

**17. I do not wish to provide any of the information requested on this form ☐**



You should always provide a question that gives people the option not to complete.

**Thank you for completing the form**

If you require this form in another language or format or need assistance completing the form please contact [Insert relevant contact details]