

# Wales Council for Voluntary Action

Supporting charities, volunteers and communities

## 4. Volunteers

### 4.6.1 Equality and diversity monitoring for volunteers



#### **What does equality and diversity monitoring mean?**

Equality and diversity monitoring involves collecting sensitive data about volunteers' backgrounds. It must be recorded, stored, used and updated in accordance with requirements set out in the [Data Protection Act](#). Information may be collected, for example, about race, gender, religion, age, disability, sexuality or language.

#### **Why do I need to monitor equality and diversity data?**

Monitoring this data can help an organisation to identify whether the diversity of their volunteer population reflects the diversity of the community they work in.

It can help to show whether there are any under-represented groups in your volunteer population so you can focus recruitment in these areas or adapt existing volunteer roles to encourage different types of volunteer to join.

It can also be a requirement of some funding applications to report on your current equality and diversity data for volunteers.

There is no legal requirement to collect this information for volunteers, but it is considered best practice because it demonstrates a commitment to providing equal opportunities to all volunteers.

To get the fullest possible cooperation of volunteers in providing Equal Opportunities data, you need to make it very clear why you need this information, what you will be doing with it and how it will help your organisation.

#### **What should I be monitoring?**

This can vary depending on the size of the project, its aims and the reasons for your monitoring. There is no need to collect data on all '[protected characteristics](#)'; think about your needs and what you will do with the data. As a general guide, if you won't be using the data then don't collect it!

Further guidance on this can be found [here](#) .

## How do I collect and record information?

There are several different ways to do this. Some examples have been listed below, each with their limitations and advantages summarised. Some may suit your project or organisation better than others:

*Collect and record information anonymously at recruitment – no names or addresses linked to it*

<b>Advantages</b>	<b>Limitations</b>
Completely anonymous, protects volunteers' information	You can't track changes to the data as your volunteer population changes (i.e. when a volunteer leaves you can't identify their data to remove it)
Some volunteers more likely to give information if they can do so anonymously	As the project develops over time the data will be less accurate for your current volunteer population
You can easily report on all volunteer equality and diversity data ever collected,	Can't pull off a snapshot of equality and diversity data for your current volunteer population

*Collect information with volunteer details at recruitment, but store separately with anonymous identifier*

Store equality and diversity data on a spreadsheet or database with an anonymous identifier code, and store the code and volunteer details separately. When volunteers leave you can identify their code and remove their equality and diversity data from your data bank.

<b>Advantages</b>	<b>Limitations</b>
You can store information anonymously and safely	Complicated process – involving an intermediate administrative step of assigning codes and safely storing the list of codes assigned to names
You can remove information when a volunteer leaves to ensure your data is an accurate representation for your volunteer population	Relies on people remembering to remove data from 'old' volunteers using the code,
You can pull off a snapshot of equality and diversity data for your current volunteer population	

## *Annual collection of data in anonymous survey*

Collect equality and diversity data anonymously from volunteer with an annual volunteer survey

<b>Advantages</b>	<b>Limitations</b>
All data is anonymous and shows a snapshot of a volunteer sample at the time of the survey	Only shows data for a sample of your volunteer population (ie those who respond) not the entire population
Easy to collect and no concerns over storing information without using it	Can be difficult to encourage volunteers to complete the survey
Opportunity to record and report on other volunteer data to aid programme improvement eg 'customer satisfaction' information or other volunteer feedback	

## *Volunteer self-populated information*

Some online software allows you to give your volunteers secure online access to the database so that they can update the information themselves.

<b>Advantages</b>	<b>Limitations</b>
Anonymous, as volunteers enter the data themselves	May rely on volunteers being proactive in supplying information - unless registration on the database is required by volunteers for other purposes
Fields can be made mandatory to maximise responses (NB a 'prefer not to say' option should be included in each case)	Not always clear who is responsible for updating leavers on the system
Self-regulating, no need for staff to keep updating information	

## **Where do I record the information?**

There are a range of options available that may be suitable for this:

- Specific volunteer management database (e.g. V-Base)
- Bespoke Excel spreadsheet
- Specific fundraising database (E.g. The Raiser's Edge)
- Access database
- Online tools

The most important things to consider are how you will use that information once it is stored, what will work for your organisation, and what your organisational data protection policies require, in terms of data storage.

## **What are the data protection considerations?**

- Individual organisations will have their own data protection policy, and any equality and diversity data should be collected and stored in line with this.
- This is confidential information, and so should not be available or accessible by the general public. Ideally it should not be available to anyone who does not need it for their job.
- Best practice is to make it a requirement for staff and/or volunteers who will have access to this information to sign up to a confidentiality policy.
- There should be an opt out, or 'prefer not to say' option available on the form
- You must make it clear to volunteers why you are collecting this information
- It is unethical to collect data if you will not use it

## **What do I do with data collected?**

There are a number of uses for this data, including:

- Annual reports
- Highlighting under-represented groups so that future volunteer recruitment can be targeted (you could compare your data with the E&D data of the local, or relevant, population)
- Often it is a requirement for grant applications to collect and submit this data

## **Our organisation doesn't work with everyone, so do we need to monitor diversity?**

Even if you work with a limited section of the population, such as students, or people affected by a health condition, you may still want to aim for the broadest diversity of volunteers that is compatible with your mission. If so, you will need to monitor this.

It may be more appropriate to compare your volunteer diversity with that for a relevant target population (such as the student population, or the population of those affected by a named health condition), rather than data for the local community as a whole.

## **We only have a small number of volunteers, how can we collect it anonymously?**

Handling Equal Opportunities data in the case of small numbers of volunteers can be a challenge because of the risk of individuals being recognisable in any report or analysis of the data

There are three possible suggestions for overcoming this:

- Accumulate data over several years to increase total numbers. It can then be analysed for volunteers over say, a 5 year or 10 year period, on a rolling basis
- Pool volunteer data with staff data to increase total numbers and report on a combined basis

- Carry out simple analysis only, by observing, describing and identifying where under representation exists. It may be, for example that you can identify under-representation in terms of language, geographical area, age or gender when your volunteer team is compared with the clients that you seek to 'match' them with or to reflect.

Appendix - Sample Equal Opportunities Monitoring Form, used by Barnardo's Cymru



**EQUAL OPPORTUNITIES MONITORING FORM – CONFIDENTIAL**

Barnardo's is committed to achieving equality of opportunity and continually monitors the effectiveness of its policy. We would like you to complete this form in order to help us understand who we are reaching. The information will be used to provide us with an overall profile analysis of our volunteering base and help us to make sure that Barnardo's welcomes volunteers from all areas of society, making us better able to help some of the most vulnerable children and young people in the UK.

Please complete each section by ticking the relevant boxes below.

**Name:** \_\_\_\_\_ **Name of Project/Dept/Shop:** \_\_\_\_\_

**Role Applied For:** \_\_\_\_\_ **Date of Birth:** \_\_\_\_\_

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**How would you describe your ethnic origin?** (as defined in 2011 census)

If **Asian** please select from below:

- |                                      |   |                                    |
|--------------------------------------|---|------------------------------------|
| <input type="checkbox"/> Bangladeshi | <input type="checkbox"/> Indian                     | <input type="checkbox"/> Pakistani |
| <input type="checkbox"/> Chinese     | <input type="checkbox"/> Any other Asian background |                                    |

If **Black** please select from below:

- |                                  |                                    |   |
|----------------------------------|------------------------------------|---|
| <input type="checkbox"/> African | <input type="checkbox"/> Caribbean | <input type="checkbox"/> Any other Black background |
|----------------------------------|------------------------------------|---|

If **Mixed/Multiple ethnic group** please select from below:

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> White & Asian                       | <input type="checkbox"/> White & Black African | <input type="checkbox"/> White & Black Caribbean |
| <input type="checkbox"/> Any other mixed/multiple background |  |  |

If **White**

- |   |   |                                   |
|---|---|-----------------------------------|
| <input type="checkbox"/> British            | <input type="checkbox"/> English                    | <input type="checkbox"/> Scottish |
| <input type="checkbox"/> Welsh              | <input type="checkbox"/> Northern Irish             | <input type="checkbox"/> Irish    |
| <input type="checkbox"/> Gypsy or Traveller | <input type="checkbox"/> Any other white background |                                   |

If **other ethnic group** please select from below:

- |  |  |
|--|--|
| <input type="checkbox"/> Arab              | <input type="checkbox"/> Any other Ethnic background |
| <input type="checkbox"/> Prefer not to say |  |

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**Gender**     Female                       Male                       Prefer not to say

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**Marital Status**     Divorced                       In a Civil Partnership                       Married

- Separated                       Single                       Widowed  
 Other                       Prefer not to say
- 

- Religion or belief**
- Buddhist                       Christian  
 Hindu                       Jewish  
 Muslim                       Sikh  
 Any other religion/belief                       None                       Prefer not to say
- 

- Sexual Orientation**
- Bisexual                       Gay man                       Gay woman/lesbian  
 Heterosexual/Straight                       Other                       Prefer not to say
- 

**Disability, impairment, mental or physical health condition**

Do you consider yourself to have a disability, impairment, mental or physical health condition that affects your daily work and life?

- Yes                       No                       Prefer not to say
- 

**For roles based in Wales only**

Are you a Welsh speaker?

- Yes                       No                       Prefer not to say
- 

**For roles based in Northern Ireland only**

Please indicate to which community you belong by ticking the appropriate box below.

- Member of the Protestant community                       Member of the Roman Catholic community  
 Member of neither the Protestant nor Roman Catholic Community                       Prefer not to say

**Thank you for providing this information**

## Further Information

[Information sheet 4.6 Equality and Diversity in Volunteering](#)

[Best practice guidance on monitoring equality and diversity in employment](#)

Produced by the Civil Service in 2012, this guide, although written with employees not volunteers in mind, includes useful details of questions and categories that could be used

[Monitoring Diversity and Equality of Opportunity in Volunteering](#)

Produced by Volunteer Now (N Ireland) in 2010

### Disclaimer

The information provided in this sheet is intended for guidance only. It is not a substitute for professional advice and we cannot accept any responsibility for loss occasioned as a result of any person acting or refraining from acting upon it.

### For further information contact

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