How to collect and share DEI data

Candid and CHANGE Philanthropy invite you to share your organization's demographics and equity practices through your GuideStar profile. Doing so shows your organization's commitment to equity, can help your organization find funders, and strengthens the sector with insights based on data.

To help you get started, we created this guide, including:

- A sample survey—taking the guesswork out of how to ask these questions

- Best practices and definitions

- The Equity Strategies Checklist to improve your processes and to share with colleagues

Sample demographic survey

Sample introduction

This survey is developed by Candid and CHANGE Philanthropy to help understand who leads and supports our organization, as we build an inclusive culture that respects diverse perspectives in all our work.

We will reflect who we are by sharing this information externally on our GuideStar profile and with funders and donors who request it. Our leader will be identified as an individual. Board and staff information will be aggregated and shared for the group.

The survey takes less than 5 minutes to complete. It is voluntary and you can select "Decline to state" on any question. Thank you for participating.

Sample questions

Race & ethnicity

1) How do you publicly self-identify?
   a. Asian American/Pacific Islander/Asian
   b. Black/African American/African
   c. Hispanic/Latino/Latina/Latinx
   d. Native American/American Indian/Indigenous
   e. White/Caucasian/European
   f. Multi-racial/Multi-ethnic (two or more races or ethnicities)
   g. Different identity (please specify)
   h. Decline to state

DEI survey best practices

- Don't guess, always ask

- Make all parts of the survey voluntary

- Include a "Decline to state" option for each question

- Treat with sensitivity and confidentiality

- Collect and share on the profile annually

Gender identity 1 *

2) How do you publicly self-identify?
    a. Female
    b. Male
    c. Gender nonbinary/Genderqueer/Gender non-conforming
    d. Decline to state

Gender identity 2 *

3) How do you publicly self-identify?
    a. Transgender
    b. Not transgender (cisgender)
    c. Decline to state

Sexual orientation

4) How do you publicly self-identify?
    a. Heterosexual or straight
    b. Gay, lesbian, bisexual (or other sexual orientations within the LGBTQIA+ community)
    c. Different identity (please specify)
    d. Decline to state

Disability

5) How do you publicly self-identify?
    a. I identify as a person with a disability
    b. I do not identify as a person with a disability
    c. Decline to state

Definitions

Publicly self-identify: The information you are providing is how you would identify in each category to the public.

Transgender: An umbrella term people may use to describe their gender identity and/or gender expression as different from the sex they were assigned at birth. People who identify as transgender might describe themselves using one or more of a wide variety of terms including genderqueer, non-binary, and transgender. Transgender people may claim/affirm their gender identity through hormones and/or surgery. Transgender identity is not dependent on surgery. Transgender identity is not a sexual orientation.[1]

Cisgender: A term used to describe a person whose gender identity is the same as the sex assigned to them at birth.[1]

Nonbinary (also non-binary): Preferred umbrella term for all genders other than female/male or woman/man, used as an adjective (e.g., Jesse is a nonbinary person). Not all nonbinary people identify as trans and not all trans people identify as nonbinary.[2]

Disability: A disability can be physical, learning, cognitive, sensory, mental or chronic health or other disability that is a barrier to everyday living.[3]

Sources: 1. UT Austin Gender & Sexuality Center 2. Trans Student Educational Resources 3. RespectAbility

Equity strategies checklist

In this section, you'll share the policies and practices your organization uses to build a culture of equity and inclusion. These strategies are developed by Equity in the Center.

Learn more through Equity in the Center or its publication Awake to Woke to Work: Building a Race Equity Culture, which provides insights, tactics, and practices to measurably shift culture such that one's race identity has no influence on how they fare within the organization.

Share your currently practices on your profile to better promote transparency on equity practices. We recommend that you also share this checklist with HR and other internal departments as a best practices guide.

Check any or all that apply (these will be displayed on your profile):

Data

☐ We review compensation data across the organization (and by staff levels) to identify disparities by race.

☐ We ask team members to identify racial disparities in their programs and/or portfolios.

☐ We analyze disaggregated data and root causes of race disparities that impact the organization's programs, portfolios, and the populations served.

☐ We disaggregate data to adjust programming goals to keep pace with changing needs of the communities we support.

☐ We employ non-traditional ways of gathering feedback on programs and trainings, which may include interviews, roundtables, and external reviews with/by community stakeholders.

☐ We disaggregate data by demographics, including race, in every policy and program measured

☐ We have long-term strategic plans and measurable goals for creating a culture such that one's race identity has no influence on how they fare within the organization.

Policies and processes

☐ We use a vetting process to identify vendors and partners that share our commitment to race equity.

☐ We have a promotion process that anticipates and mitigates implicit and explicit biases about people of color serving in leadership positions.

☐ We seek individuals from various race backgrounds for board and executive director/CEO positions within our organization.

☐ We have community representation at the board level, either on the board itself or through a community advisory board.

☐ We help senior leadership understand how to be inclusive leaders with learning approaches that emphasize reflection, iteration, and adaptability.

☐ We measure and then disaggregate job satisfaction and retention data by race, function, level, and/or team.

☐ We engage everyone, from the board to staff levels of the organization, in race equity work and ensure that individuals understand their roles in creating culture such that one's race identity has no influence on how they fare within the organization.