



Foundation

Sample Diversity, Equity and Inclusion (DEI) monitoring form

Please note this document is a sample only, to be used to know what to expect from our online DEI monitoring form.

The online DEI monitoring form is split into five sections:

- Page 1: Guidance for completing the form
- Page 2: About the mission of your organisation
- Page 3: The people/communities who will benefit from the project you are seeking funding for
- Page 4: Leadership of your organisation
- Page 5: Diversity Questions

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Page 1: Guidance for completing the DEI form

We are asking the organisations who apply for our funding some questions about their mission, leadership, and the communities that will benefit from the funding they are applying for.

Why we are asking for this data

At Co-op Foundation, with our strategy '[Building Communities of the future together](#)' we are committed to creating diverse, equitable and inclusive communities. As part of fulfilling our strategic priorities we are gathering data about organisations who apply for our funding. This will help us identify and address structural inequity and ensure that the reach of our funding and our funding practices are fair and just.

Our approach to collecting DEI data is aligned with the [DEI Data Standard](#), and the [Racial Justice Audit Tool](#), shared frameworks between funders in the UK, designed to systematically gather information in a respectful and comprehensive manner.

How we will use and share 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, enable us to identify any imbalances in our funding and how we can improve our practice to ensure our resources are directed toward communities facing systemic challenges.

If you are successful in your application, the responses you provide in this section may be included in data published about our grants on websites such as [360Giving's GrantNav](#) and [Funders for Race Equality Alliance](#) to support our transparency and accountability. The data may be linked to your organisation's name and will be publicly available. We respect the sensitivity of DEI issues, and you have the option to opt out of the publication of your leadership DEI data if you wish. This can be found at the end of the form. If you are a small organisation with a small number of Trustees and Senior Staff, we suggest you opt out of sharing this data publicly, unless all Trustees and Senior Staff have given their consent. Please read our full [Privacy Notice](#).

If your application is unsuccessful, any shared or published information will be aggregated and anonymised, protecting the confidentiality of your organisation

Completing this form

We are using the [DEI Data Standard](#) framework which includes a categorisation of organisations either led by or targeting and supporting groups experiencing structural inequity.

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 or your mission 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.

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 about 15 mins to complete. Thank you in advance for completing it.

Page 2: About the mission of your organisation

We'd like to understand more about the mission of your organisation and who it is set up to support. By this, we mean any specific groups or communities that your organisation is dedicated to serving. This might be reflected in your governing document, strategy or any materials you publish about your organisation.

The categories in this section focus on groups who may be living in a particular location or groups who are more likely to experience inequality in society. If your mission is aimed at supporting a group that isn't listed below, you can tell us in the question about any other lived experiences at the end of this page.

Question	Answer
Choose the option that best describes your organisation's mission.	<ul style="list-style-type: none">• Our mission is general (not aimed at supporting specific groups of people)• Our mission focuses on supporting certain groups in a particular location or who are more likely to experience inequality in society <p>If choosing the first option, after clicking 'Next Page', you'll be taken to Page 3. Choosing the second option, will enable you to view further options on the same page.</p>

Expanded section of page 2: What specific groups your mission is supporting.

[Please see full list in the Categories and sub-categories.](#)

Page 3: The people/communities who will benefit from the project you are seeking funding for

Note: If you are applying for unrestricted funding this page will be excluded from the form.

We want to know if the people your project is supporting or targeting are in a particular location or 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. If fewer than 75% of the people you target belong to the group please indicate as 'No'.

We understand that individuals may belong to multiple groups or communities so you can choose several, but 75% or more individuals you support should share the characteristics of all groups you select.

Example

If the people you're supporting are 80% Asian Female Refugees, you would do the following:

Answer Yes to Communities experiencing racial inequity and select 'Asian'

Answer Yes to Migrants and select 'Refugees'

Answer Yes to Women and Girls and select 'Women'

Leave all other drop-down menus as 'No'

Please select any category that you anticipate that 75% or more of people benefiting from your proposed work will identify with.

You can also choose 'Prefer not to say'

Question	Answer
Are the people your project aims to support the same as the people/communities that your organisation is dedicated to serving	<ul style="list-style-type: none">• Yes• No

in your mission (based on your answers in Page 2)?	If your response is 'Yes' after clicking 'Next Page', you'll be taken to Page 4. If your response is 'No', the page will be expanded to enable you to provide further information on the people your project aims to support.
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Question	Answer
Choose the option that best describes your project	<ul style="list-style-type: none"> • Our project is general (not aimed at supporting specific groups of people) • Our project focuses on supporting certain groups in a particular location OR who are more likely to experience inequality in society <p>If your response is "Our project is general" after clicking you 'll be taken to Page 4. If your response is "Our project focuses on supporting certain groups" the page will be expanded to enable you to provide further information on the people, your project aims to support.</p>

Expanded section of page 3: What specific groups your project is supporting.

[Please see full list in the Categories and sub-categories.](#)

Page 4: Leadership of your organisation

We'd like to understand more about the leadership of your organisation and how it relates to your mission and the people your organisation supports. We understand that there are also other ways to involve the people you support and we may ask about this separately in our application materials if it is relevant to our funding. We are interested in whether most of the people who lead or make key decisions in your organisation share a particular identity or experience(s).

By this we mean: 75% or more of your Board of Trustees/Management Committee AND 50% or more of senior staff self-identify as being from the same specific community and/or sharing the same identity(ies) and/or experience(s).

Example

For example, if your leadership consists of more than 75% young people (typically young people aged 8 - 25) with care experience, they would fall under two categories:

'Young people' and 'Lived experience' and then specify 'care experience' in the free text box at the end of this page.

You can also choose 'We don't collect this data/I don't know' or 'Prefer not to say'.

Please answer the following questions to the best of your knowledge.

If 75% percent or more of your leadership share identities/experiences, select the relevant categories below or use the 'Lived experience' text box if there isn't a relevant category in the list.

[Please see full list in the Categories and sub-categories.](#)

Opt Out

If you would like to opt out of the publication of your leadership DEI data, please tick here:

Opt out of publication

Page 5: Diversity questions

These questions aim to learn more about your organisation's approach to diversity. They are not considered part of the assessment process for your application and will not be shared externally. These questions were developed with reference to the [DEI Data Standard](#), [Funder's for Racial Equity Audit](#), and [Foundation Practice Rating](#) but are separate from them.

These questions are to find out more about the diversity of your leadership team. By leadership, we mean your board of trustees (or your Management Committee) as well as your senior management team.

Representation from communities served

Question	Answer
Does the identity profile of your leadership team have representation from the communities that you serve?	Choose one from the following: <ul style="list-style-type: none">• Yes• No• We don't collect this data / I don't know• Prefer not to say

Racial or ethnic diversity

Question	Answer
Does your leadership team include people from different racial or ethnic communities?	Choose one from the following: <ul style="list-style-type: none">• Yes• No

	<ul style="list-style-type: none"> • We don't collect this data / I don't know • Prefer not to say
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Gender

Question	Answer
Does your leadership team include people of different genders?	Choose one from the following: <ul style="list-style-type: none"> • Yes • No • We don't collect this data / I don't know • Prefer not to say

Disability representation

Question	Answer
Does your leadership team include people with disabilities?	Choose one from the following: <ul style="list-style-type: none"> • Yes • No • We don't collect this data / I don't know • Prefer not to say

Additional information

Question	Answer
Please let us know if there is anything you wish to share about the diversity of your leadership team.	Text box

Organisational Approach to Diversity and Inclusion

These questions aim to understand your organisation's broader approach to diversity and inclusion, including policies, practices, and public commitments.

Publishing diversity breakdown

Question	Answer
Does your organisation publish a breakdown of the diversity of its staff?	Choose one from the following: <ul style="list-style-type: none"> • Yes • No • We don't collect this data/I don't know • Prefer not to say

Diversity improvement plan

Question	Answer
Does your organisation have a plan to improve the diversity of its staff in the next year?	Choose one from the following: <ul style="list-style-type: none">• Yes• No• I don't know• Prefer not to say

DEI policy publication

Question	Answer
Does your organisation publish externally a DEI policy?	Choose one from the following: <ul style="list-style-type: none">• Yes• No• I don't know• Prefer not to say

Working with individuals with lived experience

Question	Answer
Does your organisation work directly with individuals with lived experience of the issues your work focuses on to inform decisions?	Choose one from the following: <ul style="list-style-type: none">• Yes• No• We don't collect this data / I don't know• Prefer not to say

Open recruitment policy

Question	Answer
Does your organisation have an open recruitment policy for trustees and staff?	Choose one from the following: <ul style="list-style-type: none">• Yes• No• I don't know• Prefer not to say

Additional information

Question	Answer
Please let us know if there is anything you wish to share about your approach to diversity and inclusion.	Text box

Categories and sub-categories

Category: Geographical location

Description	Sub-categories
Geographical - nations in the UK and regions in England.	There will be a list to identify a key UK Nation or Region in England. You will be able to specify further detail in a Free Text box if you work across more than one nation and more than one key region.

Category: Communities experiencing racial inequity

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.	<p>Choose one from the following (additional sub-categories are optional - you can only choose one option from these):</p> <ul style="list-style-type: none">• All communities experiencing racial inequity• Black/African/Caribbean/Black British<ul style="list-style-type: none">○ African○ Caribbean○ Any other Black/African/Caribbean background• Mixed<ul style="list-style-type: none">○ White and Black○ White and Asian○ Any other Mixed / Multiple ethnic background• Asian/Asian British<ul style="list-style-type: none">○ Indian○ Pakistani○ Bangladeshi○ Chinese○ Any other Asian background

	<ul style="list-style-type: none"> • Other Group experiencing ethnic or racial inequity <ul style="list-style-type: none"> ○ Arab ○ Jewish ○ Gypsy, Roma and Traveller Communities ○ Any other Ethnic group (please specify if you have selected any other ethnic group- open text box)
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Category: Disabled people

Description	Sub-categories
<p>People who self-identify as disabled, with particular impairments, which have a long-term impact on quality of life.</p>	<p>Choose one from the following (additional sub-categories are optional - again, you can only choose one option from these):</p> <ul style="list-style-type: none"> • All Disabled people • Physical Impairment <ul style="list-style-type: none"> ○ Mobility ○ Visual impairment / partial sight / sight loss ○ Hard of hearing / deaf / hearing loss ○ Speech impairment • People experiencing mental ill-health • Cognitive differences <ul style="list-style-type: none"> ○ Learning disability ○ Learning difficulty ○ Neurodivergent

Category: Faith communities

Description	Sub-categories
	<p>Choose one from the following:</p> <ul style="list-style-type: none"> • All Faith Communities • Agnostic • Atheist • Buddhist

Description	Sub-categories
	<ul style="list-style-type: none"> • Catholic • Hindu • Jewish • Muslim • Other Christian denominations • Protestant • Sikh • Other

Category: LGBTQI+ people

Description	Sub-categories
<p>Lesbian, gay, bisexual, transgender, queer or questioning, intersex, asexual and more</p>	<p>Choose one from the following (additional sub-categories are optional - again, you can only choose one option from these):</p> <ul style="list-style-type: none"> • All LGBTQI+ People • Bisexual people <ul style="list-style-type: none"> ○ Bisexual men ○ Bisexual women • Gay men • Lesbian / Gay women • Transgender people <ul style="list-style-type: none"> ○ Trans men ○ Trans women • Non-binary people • Other

Category: Migrants

Description	Sub-categories
<p>Groups who are first generation and/or recent migrants to the UK</p>	<p>Choose one from the following:</p> <ul style="list-style-type: none"> • All migrant groups • Asylum seekers • Refugees • Undocumented People

	<ul style="list-style-type: none"> • Other Migrants
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Category: People within a specific age group

Description	Sub-categories
A specific age group	Choose one from the following: <ul style="list-style-type: none"> • 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 and/or economically disadvantaged

Description	Sub-categories
People who 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

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

Category: Welsh language speaking

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

Category: Community background

Description	Sub-categories
For organisations and projects based in Northern Ireland: community background could be Protestant, Catholic or both.	Choose one from the following: <ul style="list-style-type: none">• The Protestant community• The Catholic community• Both

Category: Lived experience

Description	Sub-categories
Lived experience that may not already be reflected in other categories and sub-categories in this form (for example: people recovering from alcohol addiction, people with experience of the criminal justice system, people with care experience, people experiencing domestic violence).	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.