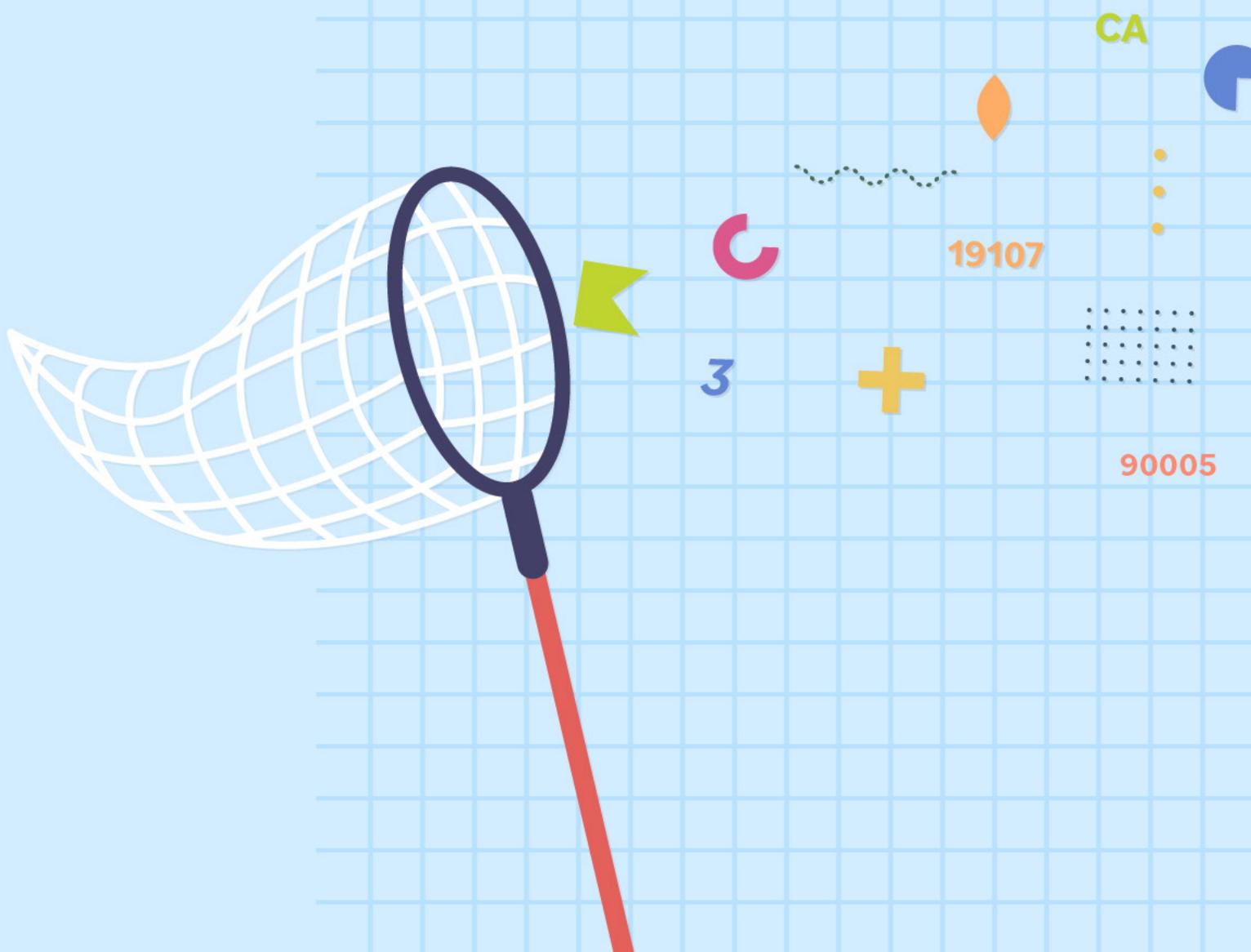# TRACKING DIVERSITY

The **Green2.0** Guide to Best Practices in Demographic Data Collection

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INTRODUCTION

> " Demographic data collection is another way in which we reflect and honor the true diversity of our communities, including those that have been historically excluded. " [1]

ABOUT GREEN 2.0

Since launching in 2014, Green 2.0 has worked to increase racial and ethnic diversity in the environmental movement. While people of color are disproportionately impacted by environmental problems, they are underrepresented in positions of power. Therefore, we track and report upon the demographics, retention rates, and inclusion practices of environmental nonprofit organizations and collect grant making information on environmental foundations to highlight diversity trends. By promoting transparency and accountability in the sector, we work to create a path forward for the sector to become more just, inclusive, and culturally relevant.

INTRODUCTION

This guide is designed to support the demographic data collection efforts of foundations and nonprofit organizations and fill the gap in the field of demographic data collection in the environmental sector. It provides insights into the importance of demographic data collection, whether for staff, board members, or grantees. It also offers support for developing and implementing a demographic data survey. We will cover the different types of variables to collect, note the importance of each, offer some questions for consideration when deciding which to include, and review the typical way of collecting each variable while suggesting improvements based on current research. We will then share some implementation best practices, discuss various ways to use your data once they have been collected, provide sample survey questions, and include additional resources for your consideration.

We hope that this guide will provide clarity and support for your demographic data collection needs, while also inspiring you to push your efforts further.

DATA COLLECTION: THE WHY, THE WHEN, AND THE HOW

WHY COLLECT

When considering whether to collect demographic data, and whom to collect these data from, we should first understand the *why*. First, collecting and utilizing demographic information can set your organization apart by affirming your commitment to equity and inclusion through your understanding of trends in your demographics. Second, identifying information provides an organization with the opportunity to know who is on their team, so the organization can function with more awareness of the group's identities related to gender, race, ethnicity, age, location, and other important characteristics highlighted below.

Thirdly, demographic data may assist in an organization's strategic planning by providing insight into what supports and systems are needed, such as affinity or employee resource groups, diversity, equity, and inclusion (DEI) committees, and other relevant resources to bolster their team's overall success. By understanding who you are working with and employing, you can assess the alignment of your organization with the communities you seek to serve. An organization

DATA COLLECTION: THE WHY, THE WHEN, AND THE HOW

may find that collecting data from staff, board members, and/or grantees may serve various organizational outcomes and should be assessed according to utility and need. For example, your organization may aim to represent the diversity within a served community through the demographics of your board membership.

Whether internally or regarding external programs and projects, demographics offer a critical metric for organizations seeking to improve their strategies, approaches, and culture.

WHEN TO COLLECT

In considering when to collect, your organization should look for opportunities built into your current practices; data can be gathered on a timeline that makes sense for your organization, the programs you run, and the grants you apply for or make. For example, when your organization brings on a new employee, it might make sense to assemble demographic data at onboarding since you are already collecting information from the new hire. Other options include instituting an annual or semiannual collection of information for employees, board members, and/or communities served. Lastly, you might need to collect demographic data for a grant application or survey from another organization, so your collection practices might best align with the timing of these events.

DATA COLLECTION: THE WHY, THE WHEN, AND THE HOW

HOW TO COLLECT

Demographic data can be collected in a variety of ways, most commonly through onboarding paperwork for staff and leadership or through an online platform for grantees, board members, community members, or any other groups your organization is interested in surveying. When selecting a method, it is important to consider both your organization's capacity to collect, store, and utilize data and the method's likely impact on future workload. For example, collecting demographic data through an online platform can make future analysis and reporting less strenuous and records more manageable.

Furthermore, when thinking through the process of demographic data collection, it is most appropriate to ask respondents to self report their data, which provides the most accurate account of their identity. The specific mechanics of data collection, which will be informed by the purpose and timing, will be considered in more detail later.

RESOURCE GUIDE SURVEY FINDINGS

If an organization is to improve its demographic data collection processes, an understanding of current best practices is essential. Therefore, Green 2.0 surveyed a sample of 21 environmental non governmental organizations (NGOs) and foundations in May and June of 2021 to get a snapshot of current practices in the field regarding the purpose, timing, and mechanics of demographic data collection. Appendix A contains the resource guide survey tool used to assess the field.

The variables most often included in demographic data collection were race, ethnicity, and gender. Reasons mentioned for collection of these variables included commitment to diversity, equity, and inclusion (DEI) work, accountability, and representation of the regions and populations served. Meanwhile, while challenges for collecting these data included not wanting to burden people and needing support to collect data.

Other variable options included disability/ability status, LGBTQ+ identity, geographic location, socioeconomic status, and primary language, in addition to age and veteran status.

RESOURCE GUIDE SURVEY FINDINGS

Most survey respondents indicated that they use a digital platform such as SurveyMonkey™ to collect their demographic data, while others use paper-and-pencil collection or an onboarding system. Additionally, most respondents use a secure drive or third party to store the data they collect.

Survey data analysis practices were also discussed in the survey. Most respondents indicated that their HR department or representative analyzes the data they collect. While some respondents did not examine patterns and trends closely, a clear majority did so through their HR departments, an external consultant, or a statistician on staff.

Lastly, data use and frequency of collection were discussed. Most respondents indicated that data were used to inform alignment of DEI goals and to assess representation within the organization, on the board, and among grantees and communities served. Data are most frequently collected annually or during onboarding of new employees.

WHAT TO COLLECT: VARIABLES

Determining which demographic variables are important to your organization can be challenging, especially if your organization is collecting demographic data for the first time. Therefore, the first step in the process of collecting demographic data is considering the type of information that should be assembled to best suit your organization's unique needs and desired outcomes. The following sections will outline the various demographic data variables that an organization could collect as well as the value of collecting each. While this list is not exhaustive, it provides a valuable starting point for considering your priorities and needs.

Here are some questions to consider when choosing which demographic variables to include in your data collection: [2]

- Does the program/strategy/funding aim to reach a specific population? Why?
- Is this information "good to know" or a "must know"?
- Can the data be used to inform strategic planning and goal mapping?
- What decisions will the data help inform?
- In what other ways will the data be used?
- Can the data be used to assess the organization's track record on outcomes?

GENDER IDENTITY

THE IMPORTANCE AND IMPLICATIONS OF COLLECTING GENDER IDENTITY

Collecting data on gender identity is important in identifying and addressing gender-related disparities and can also be used to monitor and measure diversity and inclusion in an organization or program. Gender identity (e.g., male, female, nonconforming, or nonbinary) is considered a separate category than sexual orientation (e.g., emotional or sexual feelings); **it is therefore recommended that gender identity and sexual orientation *not* be combined.** [3]

GENDER IDENTITY

TYPICAL VERSUS IMPROVED

Gender identity, which was formerly surveyed as "sex," has since evolved to include multiple gender identities in recognition that the old terminology erases the identity of those outside the binary and makes answering the question challenging or impossible. Below are examples of the old or "typical" way of asking and improved, more inclusive ways of asking about gender identity.

TYPICAL

What is your sex? [4]

◯ Male

◯ Female

IMPROVED

Which of the following best describes you? (Select one answer.) [5]

◯ Woman (could include cisgender women, transgender women, and female-identified individuals)

◯ Man (could include cisgender men, transgender men, and male-identified individuals)

◯ Nonbinary

◯ Agender

◯ Gender-fluid

◯ Gender-queer

◯ Prefer not to answer

◯ Prefer to self-describe: _____

RACE AND ETHNICITY

THE IMPORTANCE AND IMPLICATIONS OF COLLECTING RACE AND ETHNICITY

Communities of color disproportionately experience disparities in health, education, employment, and often face discrimination at work. Collecting data on race and ethnicity is important to ensure that organization procedures, policies, and programs are equitable across all racial and ethnic groups. Monitoring these data will assist in identifying and understanding the correlates of racial and ethnic disparities and tracking progress in reducing them. **For greater flexibility and data quality, the U.S. Office of Management and Budget (OMB) recommends that race and ethnicity be separated, with questions about ethnicity asked first.**

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RACE AND ETHNICITY

TYPICAL VERSUS IMPROVED

Historically, race and ethnicity have been asked as separate questions, with the range of possible responses being extremely and unnecessarily limited. Below are examples of the old or "typical" way of asking and an improved and more inclusive way of asking about race and ethnicity. Our improved categories offer a more accurate reflection of lived identities and internal demographics.

TYPICAL [6]

What is your race?

☐ American Indian or Alaska Native

☐ Asian

☐ Black or African American

☐ Native Hawaiian or Other Pacific Islander

☐ White

What is your ethnicity?

○ Hispanic

○ Non-Hispanic

RACE AND ETHNICITY

IMPROVED [7]

What is your race? (Select all that apply.)

☐ American Indian or
Alaska Native

☐ Asian Indian

☐ Black or African
American

☐ Chinese

☐ Filipino

☐ Japanese

☐ Korean

☐ Vietnamese

☐ Other Asian

☐ Native Hawaiian

☐ Guamanian or Chamorro

☐ Samoan

☐ Other Pacific Islander

☐ White

☐ Prefer not to answer

☐ Prefer to self-describe: _____

RACE AND ETHNICITY

IMPROVED [7]

Are you Hispanic or Latino/a/e/x?

○ No, not of Hispanic or Latino/a/e/x Origin

○ Yes, Mexican, Mexican American, Chicano/a

○ Yes, Puerto Rican

○ Yes, Cuban

○ Yes, Central American

○ Yes, South American

○ Yes, Another Hispanic or Latino/a/e/x

○ Prefer not to answer

○ Prefer to self-describe: _____

GEOGRAPHIC LOCATION

THE IMPORTANCE AND IMPLICATIONS OF COLLECTING GEOGRAPHIC LOCATION

Collecting data on geographic location is useful for tracking and identifying historically marginalized communities and determining areas of potential additional support. Programs and services are often more effective when located in the targeted community and when staff's race and ethnicity reflect that community. This has additional implications for hiring decisions, such as the possibility of prioritizing new hires from different parts of a city or state. There are several interrelated approaches to studying geography (i.e., systematically, regionally, descriptively, and analytically), while varying data collection methods can include direct observation, mapping, interviews, statistics, and technology.

GEOGRAPHIC LOCATION

TYPICAL VERSUS IMPROVED

Geographic location can be asked in a variety of ways depending on the needs of the program, organization, or strategy. Although this variable has remained relatively constant, below are examples of the old or "typical" way of asking and an improved and more inclusive way of asking about geographic location.

TYPICAL

Would you describe your neighborhood as:

- ○ Urban
- ○ Rural
- ○ Suburban

IMPROVED

Which region/state/county/neighborhood/zip code do you live in?*

_____

This question should be adjusted to include one location descriptor based on your organization's needs. Ex: "Which state do you live in?"

SOCIOECONOMIC STATUS (SES)

THE IMPORTANCE AND IMPLICATIONS OF COLLECTING SES

Collecting data on SES both before and after program/policy implementation is an important way to assess the impact of implementation on an individual, organizational/staff, societal, community, or neighborhood level. SES comprises education (e.g., highest year completed), income (e.g., family income, federal poverty thresholds, supplemental poverty measures, and school and neighborhood level), employment (e.g., occupation or job title), and family size/relationships. Recommendations for measurements can be obtained from The National Committee on Vital and Health Statistics. [8]

SOCIOECONOMIC STATUS (SES)

TYPICAL VERSUS IMPROVED

Historically, SES was asked based on self-identified social class. Since new research suggests multiple variables for understanding SES, this category is broken down into multiple questions. Below are examples of the old or "typical" way of asking and an improved and more inclusive way of asking about socioeconomic status.

TYPICAL [9]

Which social class group do you identify with?

○ Poor

○ Working class

○ Middle class

○ Affluent

SOCIOECONOMIC STATUS (SES)

IMPROVED [10]

Educational Attainment: [11]

Which categories describe you? (Select all that apply to you.)

- ❏ Some high school
- ❏ High school diploma or equivalent
- ❏ Vocational training
- ❏ Some college
- ❏ Associate's degree (e.g., AA, AE, AFA, AS, ASN)
- ❏ Bachelor's degree (e.g., BA, BBA, BFA, BS)
- ❏ Some post-undergraduate work
- ❏ Master's degree (e.g., MA, MBA, MFA, MS, MSW)
- ❏ Specialist degree (e.g., EdS)
- ❏ Applied or professional doctorate degree (e.g., MD, DDC, DDS, JD, PharmD)
- ❏ Doctorate degree (e.g., EdD, PhD)
- ❏ Other: please specify: _____

SOCIOECONOMIC STATUS (SES)

IMPROVED

Household Income:

What is your total household income?

○ Less than $20,000

○ $20,000 to $34,999

○ $35,000 to $49,999

○ $50,000 to $74,999

○ $75,000 to $99,999

○ Over $100,000

○ Prefer not to answer

SOCIOECONOMIC STATUS (SES)

IMPROVED

Employment: [12]

What is your current employment status?

- ⭘ Employed full time (40 or more hours per week)
- ⭘ Employed part time (up to 39 hours per week)
- ⭘ Unemployed and currently looking for work
- ⭘ Unemployed and not currently looking for work
- ⭘ Student
- ⭘ Retired
- ⭘ Homemaker
- ⭘ Self-employed
- ⭘ Unable to work

IMPROVED

Family size:

How many people (including yourself) live in your household?

_____

PRIMARY LANGUAGE

THE IMPORTANCE AND IMPLICATIONS OF COLLECTING PRIMARY LANGUAGE

It is important to understand what experiences and skills an employee of your organization has, as these skill sets have implications for inclusive practices and may be leveraged to further your organization's reach through equitable and effective communication. Collecting data on primary language is important in assessing the fluency and proficiency of employees in a preferred language. In addition, collecting information on bilingualism or multilingualism could also indicate an ability to reach a greater portion of the served population.

PRIMARY LANGUAGE

TYPICAL VERSUS IMPROVED

The primary language category has typically focused on an individual's ability to speak English, with a separate assessment of facility in other language. Newer practices center diversity and inclusion by assessing linguistic skills and background without using English as an assumed default. Below are examples of the old or "typical" way of asking and an improved and more inclusive way of asking about primary language.

TYPICAL [13]

How well do you speak English? (5 years old or older.)

- ○ Very well
- ○ Well
- ○ Not well
- ○ Not at all

Or

Do you speak a language other than English at home? (5 years old or older.)

- ○ Yes
- ○ No

IMPROVED

Which languages do you speak?

_____

_____

ABILITY AND DISABILITY STATUS

THE IMPORTANCE AND IMPLICATIONS OF COLLECTING ABILITY AND DISABILITY STATUS

A plethora of disparities exist between those who are nondisabled and disabled. By collecting this information, organizations can be more responsive to employee needs and federal and state discrimination laws, such as the Americans with Disabilties Act (ADA). It is important to understand that disabilities may be related to physical, behavioral, sensory-related, emotional, and/or developmental structure and/or function. Vitally, disabilities are not all visible; therefore, by asking employees to self-report, an organization may become more attuned to ways that it can become more inclusive and equitable in its policies, practices, and infrastructure. [14]

ABILITY AND DISABILITY STATUS

TYPICAL VERSUS IMPROVED

Below are examples of the old or "typical" way of asking and an improved and more inclusive way of asking about ability and disability status.

TYPICAL

Do you have a disability?

- ○ Yes
- ○ No

IMPROVED

Do you have a long-lasting or chronic condition (such as a physical, visual, auditory, cognitive, emotional, or other condition) that requires ongoing accommodations for you to conduct daily life activities (such as your ability to see, hear, or speak or to learn, remember, or concentrate)?

- ○ Yes
- ○ No
- ○ Prefer not to answer

LGBTQ+ IDENTITY

THE IMPORTANCE AND IMPLICATIONS OF COLLECTING LGBTQ+ IDENTITY

It is important to ask about a person's sexual orientation and identity to ensure that an organization is responsive to their identity and lived experience. Additionally, assessing the diversity of an organization can assist in determining the representation of those within the communities served and may be used for more thoughtful, equitable, and intentional internal and external practice. Sexual orientation and identity may also be correlated with other variables such as geographic location. [15]

LGBTQ+ IDENTITY

TYPICAL VERSUS IMPROVED

Historically, LGBTQ+ identity was asked on the binary of "yes" or "no" while sometimes including a third option of "prefer not to answer" and was included only for the LGBT community. New practices are more inclusive and allow for survey respondents to self-identify across a broader range of categories. Below are examples of the old or "typical" way of asking and an improved and more inclusive way of asking about LGBTQ+ identity.

TYPICAL

Do you identify as LGBT?

○ Yes

○ No

○ Prefer not to answer

LGBTQ+ IDENTITY

IMPROVED: A OR B

A

How would you describe your sexual identity?
(Select all that apply.)

- ☐ Asexual
- ☐ Bisexual
- ☐ Heterosexual/ straight
- ☐ Homosexual/gay/ lesbian
- ☐ Pansexual
- ☐ Queer
- ☐ Questioning
- ☐ Prefer not to answer
- ☐ Prefer to self-describe: _____ _____ _____

B

Are you: (Select all that apply.)

- ☐ Gay
- ☐ Lesbian
- ☐ Bisexual
- ☐ Fluid
- ☐ Pansexual
- ☐ Queer
- ☐ Demisexual
- ☐ Questioning
- ☐ Asexual
- ☐ Heterosexual or straight
- ☐ Prefer not to answer
- ☐ Prefer to self-describe: _____ _____ _____

WHAT TO COLLECT: VARIABLES

ADDITIONAL DEMOGRAPHIC DATA

Depending on your organization, it may be helpful to collect other demographic data such as pronouns, veteran status, marital status, number of dependents, age, and/or other factors related to a person's lived experience and identity. [16] Collecting this information is important in understanding how to correctly address and support colleagues, to recognize similarities, differences, and varying skill sets, and to assess organizational alignment, amplify your mission, and gauge your impact in the field.

QUESTIONS FOR CONSIDERATION

In addition to the questions provided at the beginning of this section, there are supplementary questions to consider when thinking about additional variables. Below are a few to get you started, but we encourage you to think about other impacts data collection will have on your organization, programs, and the communities your organization serves.

- Are there program-specific demographic variables your organization should be collecting?
- Where is your organization headed on its DEI goals and journey?
- Is your organization representative of the community you serve on specific variables?
- Will these data be helpful for or contribute knowledge to the broader field?
- Does data collection help with your pay scale and wage assessments?

ADDITIONAL DEMOGRAPHIC DATA

SAMPLE QUESTION

Pronouns: [17]
What are your pronouns?

○ She/Her

○ He/Him

○ They/Them

○ Ze/Zir

○ Ze/Hir

○ Prefer not to answer

○ Prefer to self-describe: _____

SAMPLE QUESTION

Veteran Status:
Are you a veteran of the U.S. Department of Defense?

○ Yes

○ No

○ Prefer not to answer

ADDITIONAL DEMOGRAPHIC DATA

SAMPLE QUESTION

Marital Status: [18]

What is your marital status?

- ○ Married or in a domestic partnership
- ○ Widowed
- ○ Divorced
- ○ Separated
- ○ Never married
- ○ Prefer not to answer

SAMPLE QUESTION

Number of Dependents:

How many dependents do you have? _____

SAMPLE QUESTION

Age:

What is your age? _____

BEST PRACTICES FOR EQUITABLE AND INCLUSIVE DEMOGRAPHIC DATA COLLECTION

IMPLEMENTATION

CONSENT AND CONFIDENTIALITY

When collecting demographic data, consider how data will be used. If data are to be used for internal purposes, such as to inform a program, **asking participants for consent is critical before capturing participant information.** When putting together a consent statement or question, your organization should also consider including information about confidentiality and data use so that participants know where (if anywhere) their data are going, how it will be used by the organization, and why collecting the data is important.

IMPLEMENTATION

SAMPLE CONSENT AND CONFIDENTIALITY QUESTIONS/STATEMENTS [19] : A OR B

A

By completing this survey, you agree that you have read and understood the purpose of the survey and voluntarily agree to participate.

B

Selecting "Agree" below indicates that you have read the information above and voluntarily agree to participate in this survey. If you do not wish to participate in this survey, please decline participation by selecting "Disagree."

○ Agree

○ Disagree

BEST PRACTICES FOR EQUITABLE AND INCLUSIVE DEMOGRAPHIC DATA COLLECTION

CONSENT AND CONFIDENTIALITY

In addition to offering the option to decline participation via the consent process, you might allow participants to opt out of individual survey questions. Whether done by stating clearly that it is acceptable to leave questions blank or by offering a "prefer not to answer" option, this allows people to choose to share specific aspects of their identities; particular survey questions can, after all, be sensitive.

MULTI-SELECT AND OPEN-ENDED QUESTIONS

Multi-select: Including multi-select options for response to demographic questions allows participants to capture their whole identity without making them feel like you are "putting them in a box" with only a single answer. This is especially important for people who have intersecting identities. Adding "select all that apply" to a question's instructions can be a quick step to capture the respondent's identity in a more inclusive way while providing quantitative data.

Open-ended questions: Including open-ended questions in your survey is the most effective way to clearly capture the nuances of a person's identity and can even be helpful in capturing detailed information your organization may not have thought about when creating the survey. Open-ended responses are simply text boxes where respondents can answer demographic questions (or other types of questions) the way they want to answer them

BEST PRACTICES FOR EQUITABLE AND INCLUSIVE DEMOGRAPHIC DATA COLLECTION

without being forced into a predetermined response category. This approach will allow for the most detailed qualitative dataset you can ask for. The downside to open-ended questions is the possibility of increased analysis time needed after the survey closes.

RESPONSE CATEGORIES: ORDER AND OTHER [20]

Order: Believe it or not, the order of the response categories can make a difference in how and if respondents interact with a question. Often you might see response categories listed in such a way that reinforces implicit bias. For example, "United States" might be listed first in a country of origin question in an effort to make a survey experience more efficient when surveying people living in the United States. This can be problematic because the response categories are making assumptions, potentially pushing individuals towards a specific response. When possible, response categories should be presented alphabetically, randomized, or in such a way to make for an inclusive experience.

Other: Including an option outside of predetermined response categories allows participants to self-identify but can often alienate respondents. An alternative is to offer a "Prefer to self-describe" option in lieu of the classic "other." This small language shift can have a big impact on respondents, especially those who do not fit into the predetermined categories.

BEST PRACTICES FOR EQUITABLE AND INCLUSIVE DEMOGRAPHIC DATA COLLECTION

AVOIDING PARTICIPANT FATIGUE

Another factor in considering the order and content of questions is participant fatigue, which occurs when questions are challenging to answer or there are too many questions in a survey. It is important to think about the questions your organization is most interested in and to list those first in the demographic section of the survey. For example, if your organization is mostly interested in someone's gender, place this question higher up in your demographic section. If your survey is gathering information outside of demographic questions, include demographic questions last, for the same reasons listed above.

USE OF DATA

DATA STORAGE

One of the most important aspects of collecting demographic data, after the deployment of the survey itself, is what you do with the data after you receive it. How you store your data is as important as the data itself. Most of the time, storing data on a secure drive such as DropboxTM, Google Drive, OneDrive, or an internal server is sufficient, but your organization should evaluate the best place for them. Having a plan to keep data secure will not only help to protect personal identifying information, but may increase the comfort level of potential participants with the survey process. [21]

BEST PRACTICES FOR EQUITABLE AND INCLUSIVE DEMOGRAPHIC DATA COLLECTION

DATA SHARING

In the context of this guide, data sharing includes the individuals or groups who will see and use the survey data once the survey closes and data are stored. When thinking about who should have access to the data collected, you should consider the purpose of sharing the data and how the data will be used. Are data being used to inform a program or strategy? Are they being used to understand the communities served? These and other questions specific to your organization's needs will help shed light on who should have access to the data and in what capacity. In general, data–especially raw data–should be kept secure and only shared with those deemed clearly necessary.

SAMPLE SURVEY QUESTIONS

Below is a sample survey for your organization to use as a springboard for demographic data collection. We have taken the best practices described in this guide as well as the improved questions and created a short, 10-question survey that covers the most frequently asked demographic questions. These questions can be sent as a stand-alone survey or added to an existing survey your organization is already using.

1. Which of the following best describes you? (Select one answer.) [22]

   ○ Woman (could include cisgender women, transgender women, and female-identified individuals)

   ○ Man (could include cisgender men, transgender men, and male-identified individuals)

   ○ Nonbinary

   ○ Agender

   ○ Gender-fluid

   ○ Gender-queer

   ○ Prefer not to answer

   ○ Prefer to self-describe: _____

SAMPLE SURVEY QUESTIONS

2. Are you Hispanic or Latino/a/e/x?

   ○ No, not of Hispanic or Latino/a/e/x Origin

   ○ Yes, Mexican, Mexican American, Chicano/a

   ○ Yes, Puerto Rican

   ○ Yes, Cuban

   ○ Yes, Central American

   ○ Yes, South American

   ○ Yes, Another Hispanic or Latino/a/e/x

   ○ Prefer not to answer

   ○ Prefer to self-describe:

   _____

   _____

3. What is your race? (Select all that apply.)

   ❑ American Indian or Alaska Native

   ❑ Asian Indian

   ❑ Black or African American

   ❑ Chinese

   ❑ Filipino

   ❑ Japanese

   ❑ Korean

   ❑ Vietnamese

   ❑ Other Asian

   ❑ Native Hawaiian

   ❑ Guamanian or Chamorro

   ❑ Samoan

   ❑ Other Pacific Islander

   ❑ White

   ❑ Prefer not to answer

   ❑ Prefer to self-describe:

   _____

   _____

SAMPLE SURVEY QUESTIONS

4. Which region/state/county/neighborhood/zip code do you live in?*

_____

* This question should be adjusted to include one location descriptor based on your organization's needs. Ex: "Which state do you live in?"

5. Which categories describe you? (Select all that apply to you.)

☐ Some high school

☐ High school diploma or equivalent

☐ Vocational training

☐ Some college

☐ Associate's degree (e.g., AA, AE, AFA, AS, ASN)

☐ Bachelor's degree (e.g., BA, BBA, BFA, BS)

☐ Some post-undergraduate work

☐ Master's degree (e.g., MA, MBA, MFA, MS, MSW)

☐ Specialist degree (e.g., EdS)

☐ Applied or professional doctorate degree (e.g., MD, DDC, DDS, JD, PharmD)

☐ Doctorate degree (e.g., EdD, PhD)

☐ Other: please specify: _____

SAMPLE SURVEY QUESTIONS

6. What is your total household income?

   ○ Less than $20,000

   ○ $20,000 to $34,999

   ○ $35,000 to $49,999

   ○ $50,000 to $74,999

   ○ $75,000 to $99,999

   ○ Over $100,000

   ○ Prefer not to answer

7. What is your current employment status?

   ○ Employed full time (40 or more hours per week)

   ○ Employed part time (up to 39 hours per week)

   ○ Unemployed and currently looking for work

   ○ Unemployed and not currently looking for work

   ○ Student

   ○ Retired

   ○ Homemaker

   ○ Self-employed

   ○ Unable to work

SAMPLE SURVEY QUESTIONS

8. Which languages do you speak?

   _____

   _____

9. Do you have a long-lasting or chronic condition (such as a physical, visual, auditory, cognitive, emotional, or other condition) that requires ongoing accommodations for you to conduct daily life activities (such as your ability to see, hear, or speak or to learn, remember, or concentrate)?

   ○ Yes

   ○ No

   ○ Prefer not to answer

SAMPLE SURVEY QUESTIONS

10. How would you describe your sexual identity?
    (Select all that apply.)

    ☐ Asexual

    ☐ Bisexual

    ☐ Heterosexual/straight

    ☐ Homosexual/gay/lesbian

    ☐ Pansexual

    ☐ Queer

    ☐ Questioning

    ☐ Prefer not to answer

    ☐ Prefer to self-describe: _____

    _____

TRACKING DIVERSITY GUIDE SURVEY

PURPOSE

To support the field's efforts to collect demographic data by creating a resource guide, which will standardize and share best practices with respect to data collection and analysis of diversity, equity, and inclusion (DEI) practices.

INTRODUCTION

Tracking and reporting demographic data on the staff and leadership of foundations and nonprofit organizations is important in promoting transparency and accountability in diversity in the sector. To support foundations and nonprofit organizations in collecting demographic data, Green 2.0 has contracted with Keecha Harris and Associates, Inc. (KHA), to conduct an analysis of best practices in data collection by funders and nonprofit organizations in order to create a resource guide. You can participate in and contribute to the resource guide by completing a survey on your current collection practices and use of demographic data, specifically among employees, board members, and communities served. This confidential survey of funders and nonprofit organizations will launch on Monday, May 17. The survey will close at 5:00 p.m. EST on Friday, June 11. Data will be collected anonymously and will be reported in the aggregate. If you have any questions please reach out to Leslie Reynolds at Keecha Harris and Associates, Inc.

APPENDIX A

DEMOGRAPHIC COLLECTION PRACTICES

Do you collect demographic data from your employees in the following categories? Please select all that apply.

☐ Race　　　　　　　　　　☐ Geographic Location

☐ Ethnicity　　　　　　　　☐ Socioeconomic Status

☐ Gender Identity　　　　　☐ Primary Language

☐ Disability　　　　　　　　☐ Other: _____

☐ LGBTQ+ Identity

Why do you collect data in these categories? Please discuss any rationale for collecting.

_____

_____

Why do you not collect data in these categories? Please discuss any barriers, challenges, or reticence with collecting.

_____

_____

Do you collect demographic data from your board members in the following categories? Please select all that apply.

☐ Race　　　　　　　　　　☐ Geographic Location

☐ Ethnicity　　　　　　　　☐ Socioeconomic Status

☐ Gender Identity　　　　　☐ Primary Language

☐ Disability　　　　　　　　☐ Other: _____

☐ LGBTQ+ Identity

Why do you collect data in these categories? Please discuss any rationale for collecting.

_____

_____

Why do you not collect data in these categories? Please discuss any barriers, challenges, or reticence with collecting.

_____

_____

Do you collect demographic data from your community served in the following categories? Please select all that apply.

❏ Race

❏ Ethnicity

❏ Gender Identity

❏ Disability

❏ LGBTQ+ Identity

❏ Geographic Location

❏ Socioeconomic Status

❏ Primary Language

❏ Other: _____

Why do you collect data in these categories? Please discuss any rationale for collecting.

_____

_____

Why do you not collect data in these categories? Please discuss any barriers, challenges, or reticence with collecting.

_____

_____

APPENDIX A

QUESTIONS

Are there additional demographic questions your organization asks of employees?

_____

_____

Are there additional demographic questions your organization asks of board members?

_____

_____

Are there additional demographic questions your organization asks of the community served?

_____

_____

STORAGE

How are data collected? Please select all that apply.

❑ Paper survey

❑ Online survey (e.g., SurveyMonkey®, Qualtrics)

❑ In-person survey or interview

❑ Other: _____

How are data stored once they are collected? Please select all that apply.

❑ Locked cabinet

❑ Secure digital storage (e.g., Dropbox, company drive or server)

❑ Other: _____

APPENDIX A

ANALYSIS

How are data analyzed once they are received?

_____

_____

DATA USAGE

How are employee demographic data used?

_____

_____

How are board demographic data used?

_____

_____

How are community served data used?

_____

_____

REPORTING PRACTICES

How frequently are employee demographic data collected and reported?

_____

_____

How frequently are board demographic data collected and reported?

_____

_____

How frequently are community served demographic data collected and reported?

_____

_____

APPENDIX B

ADDITIONAL RESOURCES

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