

## Guidelines, Advice and Recommended Analysis

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## How to Use the Gender Equality & Diversity Self-Monitoring Grid

### Objective

To better understand issues related to diversity in theatres, and to be able to take appropriate action, we recommend that interested theatres set up routine monitoring of specific diversity indicators.

The aim of this document is to provide guidelines for such monitoring.

To be clear: Monitoring consists of collecting and recording information on a regular and stable basis to track changes over time and subsequently take informed decisions. The level of monitoring, and therefore the indicators monitored, depend on the information needed for action.

### Structure

This guideline document sets out two levels of indicators: a recommended level for annual monitoring, and the option for more deeper analysis, which could be conducted as part of larger research every 5 years.

The two separate codebooks below are provided as supplementary material to the study on Gender Equality & Diversity in European Theatres and have been prepared to show in a very precise and detailed way what must be asked or must be done during the data collection (both for monitoring and for research purposes)

### Recommended collection process

An effective monitoring process is standardized and regular. This means that the method and frequency of collection should be identical (or at least very comparable) from one collection period to another. The indicators used must therefore be well-defined beforehand. All persons involved in the data collection should have the same understanding of the indicators. For example, each year of data collection should always use the same logic to label a show as a "classic play" or as a "genre play".

To be regular and cost-effective, data should be collected directly by people who work in theatres and who are familiar with the theatre's programming. This will allow them to record data that may not always appear in the programmes. We recommend that the support is online monitoring, which is cost effective as it avoids secondary data entry work. It also allows you to have data in real time.

## Video Introductions to the Self-Monitoring Grid:

- General Advice on Using the Gender Equality & Diversity Self-Monitoring Grid, by Prof. Sarah Sepulchre, UCLouvain (Belgium): <https://vimeo.com/564106014>
- An Introduction to the Gender Equality & Diversity Self-Monitoring Grid, by Prof. Sarah Sepulchre, UCLouvain (Belgium): <https://vimeo.com/564106170>

## Gender Equality and Diversity in Theatres

### Recommended indicators

The monitoring is intended to identify relevant information regarding 1/ diversity issues (such as sociodemographic characteristics), 2/ the HR working situation; 3/ individual discrimination and negative work conditions that an individual may suffer from and 4/ the organisational culture in relation to the discrimination issues. In the 'research' section of the tables, several variables are proposed. These will make it possible to deepen the analyses and possibly study the processes underlying the dynamics related to diversity and discrimination.

The following variables can be tracked through a simple excel spreadsheet.

Questionnaire to be completed once a year by Theatres Directors or HR Managers

Variables (monitoring)
Theatre Name
Gender equality policy: existence
Gender equality policy: reason
Gender equality policy: monitoring
Action for gender equality and diversity management
Diversity equality policy: other contents

Questionnaire to be completed by the workers (any function)

Variable	Monitoring (every year)	Research (every 5 years)
Demographics	Age Disability Diploma Ethnic group Gender Identity Transgender status Sexual orientation	'Out' status regarding sexual orientation 'Out' status regarding trans* identity
Work issues	Current contract Position	Responsibility level

Discrimination / individual conditions	Perceived stress caused by work Wage quality Professional and artistic recognition Sexual harassment (gender harassment, unwanted attention, coercion)	Reprimands - gender Discrimination awareness - gender Reprimands - ethnicity Discrimination awareness - ethnicity Actor roles types - varied Actor roles types - gender-stereotyped Valence of reviews Subject of reviews Awards
Organisational culture	Institutional global discrimination	Institutional sexist discrimination Institutional ethnic discrimination
Stereotypes		Essentialisation

## Recommended analyses

In this section we present a (non-exhaustive) number of recommended analyses. These are organized as a function of the issue or question to investigate. Several types of analyses are suggested.

NB: We use here the term "Diversity sub-groups" to summarize the variables including disability, ethnic group, gender identity, trans\* status, and sexual orientation.

Issue/question	Variables	Analysis	Example of analysis
Monitoring general diversity	Demographics	Frequencies	Count Ethnic groups Count Gender Identity Count Trans* status Count Sexual orientation Count Disability
Actual individual inequalities	Demographics	Cross tabulations Chi <sup>2</sup> T-tests	- Positions, Contracts, Responsibility level by Diversity sub-groups
	Work issues	Analysis of variance (ANOVA)	- Perceived stress, wage quality and professional recognition by Diversity sub-groups
	Discrimination / individual conditions		- Reprimands, Discrimination awareness

			by Diversity sub-groups (controlled for 'out' status)  - Actor roles types by Diversity sub-groups  - Valence of reviews, subject of reviews, Awards received by Diversity sub-groups
Experienced sexism or ethnic discrimination	Demographics  Work issues  Institutional discrimination  Organisational culture	Cross tabulations Chi <sup>2</sup> T-tests Analysis of variance (ANOVA)	- Institutional global discrimination by Diversity sub-groups (controlled for Work issues)  - Sexual harassment (gender harassment, unwanted attention, coercion) by gender, sexual orientation and transgender status (controlled for 'out' status)  - Institutional sexist discrimination n gender, sexual orientation and transgender status (controlled for outness)  - Institutional ethnic discrimination by Ethnic group
Diversity culture	Organisational culture  Stereotypes	Distribution Means	Level of institutional global discrimination

	<p>Gender equality policy (existence, monitoring)</p> <p>Action for gender equality and diversity management</p> <p>Diversity equality policy: other contents</p>		<p>Level of sexual harassment (gender harassment, unwanted attention, coercion)</p> <p>Level of Essentialisation</p> <p>Level of 'out' status regarding trans-identity</p> <p>Level of 'out' status regarding sexual orientation</p>
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## Gender Equality and Diversity in Programmes

The monitoring is intended to identify relevant information regarding diversity issues. These issues can be the subject of the shows (themes), but also be reflected in the people who participate. The grid is therefore trifold. A first part includes metadata related to the theatre. A second part focuses on the shows: their type, genre, themes. A third part lists the people mentioned in the programme, i.e. the members of the production team (author, director, etc.), the characters who are highlighted, but also all backstage positions.

### Recommended indicators

NB: We use here the term "diversity" to summarize the variables of gender, origin, social class, age, sexual orientation, religion, health condition.

#### Part 1: Theatre-related metadata

Level	Monitoring indicators	Optional indicators
Location	Country	Gender equality index
	City type (capital, regional/provincial capital, secondary town)	Cultural offer (number of theatres in the city, etc.)
Theatre	Theatre	Volume of activities (number of shows per year) Opening date of the theatre
	Theater type (public, private, association...)	Volume of stable staff (% of staff with stable contracts) Diversity of stable staff
	Theater direction: diversity of directors and administrators	Type of staff contracts
	Diversity policy (yes/no)	Details of the diversity policy (date, type of policy...)

#### Part 2: show-related metadata

Level	Monitoring indicators	Optional indicators
Show	Code number (or title)	New work (this show is/ is not a new work)

	Type of show (play, opera, music, dance, humour, youth, performance, digital, other)	Date of creation (or categories: classical, modern classical (before 2000), contemporary (after 2000/))
Decision makers	Number and diversity of authors	Professional experience of decision makers
	Number and diversity of directors	Age of decision makers
Stories told	Themes (categories)	
	Diversity discussed (explicitly and directly – first theme, explicitly but secondary theme, implicitly, not discussed)	
	Type of diversity discussed (gender, origin, social class, age, sexual orientation, religion, health condition, other)	
	Type of topic enunciation (neutral, negative, positive)	

### Part 3: implicated persons

Level	Monitoring indicators	Optional indicators
Show	Code number	
Sociodemographic (diversity) data	Code number (or name?)	
	Gender (Man, woman, Non-binary or fluid, Trans*, unknown, Other)	
	Age (year of birth)	Professional experience
	Perception of origin (Perceived as white/Caucasian, Perceived as Black, Perceived as Arab, Perceived as Asian, Perceived as Latino-American, Perceived as Roma, Other, Unknown)	
	Sexual orientation (Heterosexual, Homosexual, Bisexual, Asexual, Pansexual, Other, Unknown)	

	Social stratus (Working class, Middle class, Upper middle class, Upper class, Other, Unknown)	
	health condition (Neutral, Mental disability, Physical disability, Disease, Disorder (dyslexia), other, Unknown)	
	Religion (Christianity, Islam, Judaism, Buddhism, Hinduism, Traditional religions, Other, Unknown)	
Function	<ul style="list-style-type: none"> <li>- Writing/ composition/ choreography</li> <li>- Stage direction/ scenography</li> <li>- Interpretation/ play/ dance/ music/ acrobatics</li> <li>- Production</li> <li>- Casting</li> <li>- Physical training/ physiotherapy</li> <li>- Coaching/ rehearsal/ preparation</li> <li>- Puppet construction/ equipment/ machine animation</li> <li>- Documentation/ research</li> <li>- Advice/ consultancy</li> <li>- Illustration/ video animation/ artistic collaboration</li> <li>- Translation/ sign language/ interpreter</li> <li>- Pedagogy</li> <li>- Set</li> <li>- Sound, image, light</li> <li>- Make-up/hairdressing</li> <li>- Prompter</li> <li>- Guide</li> <li>- Other</li> <li>- unknown</li> </ul>	<p>For performers:</p> <ul style="list-style-type: none"> <li>* character interpreted (first role, secondary role, figuration, other)</li> <li>* match between character/interpreter (Identical characteristics, At least one dissonant characteristic, Unknown)</li> </ul> <p>Dissonant characteristic(s): Gender, Origin, Social class, Age, Sexual orientation, Religion, Health condition...</p>



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