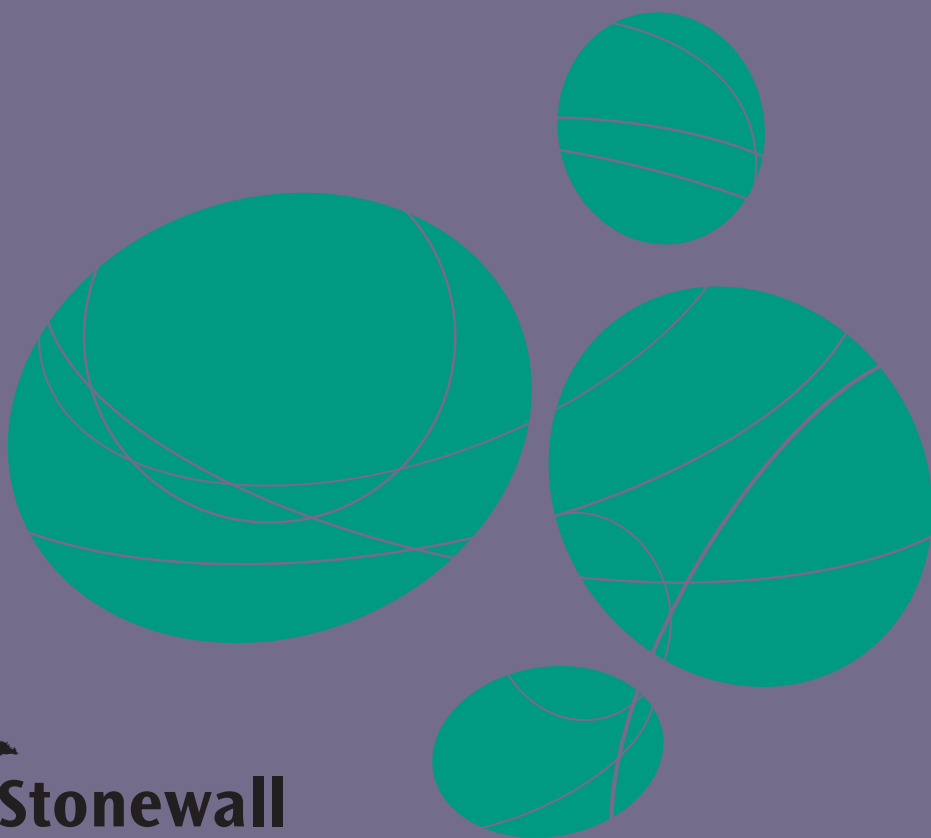


# USING MONITORING DATA

Making the most of sexual  
orientation data collection



**Stonewall**  
WORKPLACE GUIDES

# USING MONITORING DATA

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orientation data collection



**Stonewall**

WORKPLACE GUIDES

## **USING MONITORING DATA**

Making the most of sexual orientation data collection

### **Stonewall**

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# FOREWORD

Employers are finding ever more sophisticated ways of using data collection, including sexual orientation monitoring, to find out who their staff, customers and service users are.

Data relating to sexual orientation also provides a powerful tool to measure success in eradicating homophobia from

the workplace. Monitoring helps employers identify what works well and what doesn't in their organisation.

But while good practice has evolved, the basic rationale for monitoring hasn't changed: what you measure you can manage.

This guide showcases best practice from organisations using monitoring data effectively to identify and tackle instances of anti-gay discrimination and harassment, as well as to understand their staff, customers and service users better. In doing so, they are all creating better workplaces for Britain's 1.7 million lesbian, gay and bisexual employees.

**BEN SUMMERSKILL** Chief Executive, Stonewall

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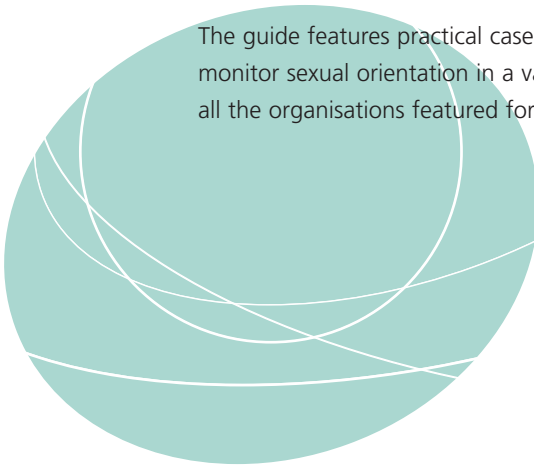
# INTRODUCTION

This good practice guide is the eleventh in a series of workplace guides from Stonewall, Britain's leading lesbian, gay and bisexual equality organisation. This is the second in the series focusing on sexual orientation monitoring and aims to address some of the more sophisticated challenges now facing employers in this area.

Many employers now recognise the importance to business objectives of addressing inequality in the workplace, and have been undertaking initiatives for some years to ensure lesbian, gay and bisexual employees are treated fairly and with respect. Monitoring sexual orientation is becoming increasingly common in both the public and private sectors, as more and more employers come to see monitoring as an important tool for measuring progress on making workplaces more gay-friendly.

This guide explores the benefits to employers of collecting data about the sexual orientation of employees, and how they can use that data to understand and improve the experiences of their workforce. It also demonstrates how some organisations have drawn on their experience in this area to monitor customers and service users too. This enables organisations to better understand who their customers are, and to ultimately provide better services to them.

The guide features practical case studies from organisations that monitor sexual orientation in a variety of ways. We are grateful to all the organisations featured for sharing their experiences with us.



# CHAPTER

# THE BUSINESS CASE

## What is monitoring?

Monitoring is the collection of data about the workforce or about customers and service users. It's a sophisticated way of better understanding who an organisation is, who its staff are and who buys its products or uses its services. This allows organisations to work intelligently to respond to the needs of their staff, customers and service users.

Quite simply, sexual orientation monitoring means asking employees, customers and service users the following question:

***What is your  
sexual  
orientation?***

- ☐ Bisexual
- ☐ Gay man
- ☐ Gay woman/lesbian
- ☐ Heterosexual/straight
- ☐ Other
- ☐ Prefer not to say

Many organisations have been collecting staff data relating to gender, ethnicity and disability for many years. In recent years the best organisations have come to recognise the value of collecting

data about the sexual orientation of their staff, customers and service users too. In some sectors regulators have begun to monitor sexual orientation across an entire sector, in order to get an even broader picture of diversity.

Asking employees, customers or service users to declare their sexual orientation in a monitoring exercise is not the same as encouraging lesbian, gay and bisexual people to be open about their sexual orientation with their colleagues or service providers. Monitoring is about collecting data, in some cases anonymously, in order to identify broad trends.

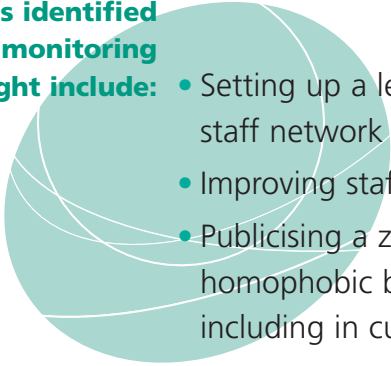
## Why monitor sexual orientation?

Monitoring sexual orientation enables employers to find out how many lesbian, gay and bisexual people work for them and how their experiences at work compare to those of their colleagues.

Monitoring data might for instance be used to identify levels of job satisfaction amongst lesbian, gay and bisexual staff, or whether there are barriers to lesbian, gay and bisexual people reaching the most senior positions in the organisation. It also helps organisations find out whether lesbian, gay and bisexual people are buying their products or accessing services and if so whether products and services are sufficiently meeting their needs.

Once an organisation knows these things, it can take action to identify any problems by targeting resources to particular problem areas. By continuing to monitor over time, employers can then find out whether these actions have had any measurable impact. This tells employers where further action may be needed, and also provides robust evidence when initiatives to eradicate homophobia from the workplace have been successful. This can be vital to getting senior management on board with promoting broader initiatives around lesbian, gay and bisexual equality.

**Initiatives to address  
problems identified  
by monitoring  
might include:**

- 
- Setting up a lesbian, gay and bisexual staff network
  - Improving staff training on sexual orientation
  - Publicising a zero tolerance approach to homophobic bullying and harassment – including in customer areas
  - Introducing a mentoring scheme for talented lesbian, gay and bisexual employees
  - Targeting job advertisements at potential lesbian, gay and bisexual recruits
  - Promoting the Stonewall Leadership Programme to lesbian, gay and bisexual staff

## The benefits

**UNDERSTAND STAFF BETTER** By identifying the proportion of lesbian, gay and bisexual people in the workforce and where they are represented throughout the organisation, employers are able to take targeted action to respond to their needs. Monitoring sexual orientation throughout the employment cycle enables organisations to maximise the potential of talented gay employees, by identifying and removing barriers that they may face in their career progression.

**UNDERSTAND CUSTOMERS AND SERVICE USERS BETTER**

Organisations that monitor customers and service users have a better understanding of who their customers are and are ultimately able to deliver better products and services. Finding out how many lesbian, gay and bisexual people are accessing services and what they think of them gives organisations a better understanding of where improvements may need to be made.



**IMPROVE EFFICIENCY** Using monitoring data means that any initiatives undertaken to create gay-friendly workplaces are based on evidence rather than on assumptions about what might be needed. This will increase their likelihood of success. In turn this helps lesbian, gay and bisexual employees perform better and supports them to deliver more cost-effective products and services.

**ENHANCE CREDIBILITY** By monitoring sexual orientation, organisations demonstrate that they recognise sexual orientation may have an impact on performance. Using monitoring data to demonstrate that initiatives have substantially improved the workplace or services for lesbian, gay and bisexual people improves an organisation's reputation amongst existing staff and talented gay recruits, as well as amongst clients and service users.

**SEND A SIGNAL TO LESBIAN, GAY AND BISEXUAL PEOPLE**

By including sexual orientation in monitoring exercises, organisations send a strong signal to lesbian, gay and bisexual people that their needs are being considered. Failing to include a question about sexual orientation – or giving people the option to declare they are married but not that they are in a civil partnership – can lead lesbian, gay and bisexual people to think that an organisation isn't a welcoming environment for gay staff or customers. This can have a damaging impact on staff motivation and customer loyalty.

**COMPLY WITH THE LAW** All employers are responsible under the Equality Act 2010 for protecting their employees from discrimination and harassment at work because of sexual orientation. Using monitoring data to identify and prevent harassment and discrimination helps employers to avoid the risk of costly employment tribunals. For public bodies and those delivering services on their behalf, monitoring data is a useful way of demonstrating compliance with the public sector Equality Duty.

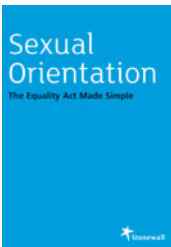
The public sector Equality Duty requires public bodies to proactively promote equality for lesbian, gay and bisexual people. It is implemented slightly differently in England, Scotland and Wales.

In **England** public bodies are required to annually publish information to demonstrate how they are complying with the duty. Monitoring is a good way of obtaining this evidence.

In **Scotland** public bodies are specifically required to annually gather data on the proportion, recruitment, development and retention of lesbian, gay and bisexual employees. This data must be published biannually, along with details of what progress has been made in gathering and using this information to better comply with the equality duty.

In **Wales** public bodies are specifically required to collect data about the proportion of lesbian, gay and bisexual people in the workforce. This includes those applying for jobs, taking up training opportunities and leaving the organisation, as well as those involved in grievance procedures or subject to disciplinary procedures. Public bodies are required to publish this data annually, providing it doesn't identify individuals.

For further information about how the duty applies in Scotland and Wales contact **Stonewall Scotland** on [info@stonewallscotland.org.uk](mailto:info@stonewallscotland.org.uk) or **Stonewall Cymru** on [cymru@stonewallcymru.org.uk](mailto:cymru@stonewallcymru.org.uk).



Stonewall has produced Plain English guidance for employers and service providers in England, telling them exactly what they need to know and do to ensure they are complying with the Equality Act in their workplaces and when providing services. The guide is free to download from the Stonewall website.



Stonewall Scotland has produced good practice guidance for public sector organisations on service user monitoring. The guide is free to download from the Stonewall Scotland website.

## 2 CHAPTER

Monitoring can be carried out in a number of different ways. Many employers introduce different forms of monitoring one at a time as the organisation becomes more familiar with the monitoring process. One form of monitoring is not a replacement for another – the following methods can all be used alongside each other to provide valuable data sets that can be used in different ways to find out different things:

- Snapshot monitoring of employees
- Staff satisfaction surveys
- Attaching data to confidential HR records
- Monitoring customers and service users

This chapter explains each of these forms of monitoring in detail.



# Snapshot monitoring of employees

## **WHAT IT IS:**

- A stand-alone monitoring section added to an existing form, used in recruitment exercises, exit questionnaires, grievance procedures or as an 'employee census'. Employees or job applicants fill it out and it includes a question about sexual orientation.

## **WHY MONITOR THIS WAY?**

- This only provides limited data about circumstances at a particular point in time but is a good way of introducing monitoring to the workplace and familiarising employees with monitoring questions.

## **THE DATA CAN TELL YOU WHETHER LESBIAN, GAY AND BISEXUAL PEOPLE:**

- want to work for the organisation
- are more likely to leave the organisation
- are more likely to be dismissed or made redundant
- are more likely to bring grievances
- are represented in senior levels of the organisation

## **KEY THINGS TO REMEMBER:**

- Permanently detach the monitoring form from any information that might identify individuals, and collate and analyse the data separately.
- Explain why you are collecting the data. This will encourage applicants and employees to fill in the form.
- Reassure employees that the data is being collected anonymously. Consider whether it's possible that individuals may be identified from the original forms, for instance because of their ethnicity or management grade. If so explain exactly how the data will be stored and who will have access to it.
- Assure job applicants that monitoring information will be detached from their application and will not be used to decide who to shortlist or appoint.

Monitoring at recruitment is a useful indicator of whether recruitment processes give lesbian, gay and bisexual applicants a fair chance, and whether employers are recruiting the best applicants from the widest possible talent pool. It also tells employers whether they are complying with their legal obligation not to discriminate against job applicants on the grounds of sexual orientation.

Employers should make strenuous efforts to make sure that sexual orientation monitoring data is not handled by shortlisting panels or used to decide who to shortlist or appoint. Applicants should always be assured that this is the case.

In very rare cases it may be appropriate to take the sexual orientation of candidates into account in the recruitment process. This is known as positive action and is permitted under the Equality Act, but only to address disadvantage or underrepresentation in the workforce. If faced with two or more candidates for a job or promotion who are equally qualified in every way, employers can lawfully appoint a candidate because of their sexual orientation. For most employers these circumstances are very unlikely to arise and monitoring data should never be routinely shared with interview panels.

Some organisations periodically distribute an anonymous 'employee census' form to all staff in order to establish the make-up of the workforce. The data is not linked to individuals and provides a simple snapshot of the representation of lesbian, gay and bisexual people in the organisation at the time of conducting the exercise.

Monitoring sexual orientation when employees leave the organisation can provide valuable information about whether there are factors driving lesbian, gay and bisexual staff out of the organisation, as well as whether dismissal procedures are fair.

# Staff satisfaction surveys

## WHAT IT IS:

- Adding monitoring questions to anonymous staff satisfaction surveys.

## WHY MONITOR THIS WAY?

- This is a good way of finding out about the experiences of staff who are not out in the workplace and who may not feel confident disclosing their sexual orientation in other monitoring exercises.

## THE DATA CAN TELL YOU WHETHER LESBIAN, GAY AND BISEXUAL PEOPLE:

- experience higher or lower levels of job satisfaction than their colleagues
- believe the organisation is committed to promoting equality in the workplace
- perceive that there are barriers to promotion
- think the recruitment process is fair

## KEY THINGS TO REMEMBER:

- Explain why you are collecting the data. This will encourage employees to answer the monitoring questions.
- Reassure employees that the data is being collected anonymously.
- Explain exactly how the data will be reported, emphasising that no data will be published that may out any individuals as gay.

Anonymous staff satisfaction surveys are a useful opportunity to ask questions relating to sexual orientation. Staff surveys are not a replacement for monitoring throughout the employment cycle, but rather provide employers with additional information about the experiences of lesbian, gay and bisexual staff in the workplace.

By including a basic monitoring question in staff satisfaction surveys, employers are able to cross-reference employees' sexual orientation with general questions about staff satisfaction. This can help employers identify whether lesbian, gay and bisexual employees experience higher or lower levels of morale than their colleagues.

By asking, for instance, whether staff enjoy going to work and cross-referencing the responses with people’s answers to the sexual orientation question, this might reveal whether lesbian, gay and bisexual staff enjoy their jobs more or less than their heterosexual colleagues.

Staff surveys can also be used to ask specific questions of those who have identified as lesbian, gay or bisexual. These might include:

***Are you open about your sexual orientation?***

	YES	PARTIALLY	NO
At home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
With colleagues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
With your manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
At work generally	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

***Have you experienced homophobic bullying or harassment in the workplace?***

☐ Yes, and I reported the incident

☐ Yes, and I did not report the incident

☐ No

**Ernst & Young** conducts a biannual Global People Survey asking 74 questions covering all aspects of engagement with the firm. This anonymous survey asks participants to disclose their sexual orientation (along with other equality questions), enabling the firm to analyse all questions by sexual orientation. The firm compares results with the previous year’s survey, in order to identify progress. In its most recent analysis, Ernst & Young found that the number of lesbian and gay employees saying they are proud to work for the firm had increased from 72% to 86%.

As well as conducting staff satisfaction surveys, some employers carry out equality and diversity surveys, or surveys specifically aimed at lesbian, gay and bisexual staff, to assess the effectiveness of initiatives to promote equality in the workplace.

**Clydesdale Bank** runs an anonymous staff diversity survey every two years. The survey includes a question about sexual orientation as well as a question on harassment, discrimination and exclusion. Staff reply confidentially and anonymously and this is made clear to all staff before carrying out the exercise. While the data is broken down by individual business units for analysis, the results on sexual orientation are only published at UK level to avoid identifying any individuals.

The **Civil Service Rainbow Alliance**, a volunteer-based network group that supports lesbian, gay, bisexual and transgender staff in the Civil Service, commissioned a research project on career development. Over 800 lesbian, gay, bisexual and transgender civil servants responded to an online survey and participated in focus groups, looking at the barriers and opportunities to support career progression.

The subsequent report highlighted particular areas of concern for lesbian, gay, bisexual and transgender employees, including barriers to progression, monitoring and training, and made recommendations for improving career development procedures across the Civil Service as a whole.

Stonewall asks all employers submitting to the Workplace Equality Index to invite their lesbian, gay and bisexual employees to participate in a survey about their experiences at work. **Southend-on-Sea Borough Council** heavily promotes the survey, including highlighting it in team briefs to all managers. The data is very valuable to the diversity team in identifying the number of lesbian, gay and bisexual staff in the organisation.



# Attaching data to confidential HR records

## WHAT IT IS:

- Attaching monitoring information to employees' confidential HR records.

## WHY MONITOR THIS WAY?

- This monitoring data can be cross-referenced with other data held by the organisation about employees such as salaries, periods of absence, performance management and instances of disciplinary action.

## THE DATA CAN TELL YOU WHETHER LESBIAN, GAY AND BISEXUAL PEOPLE:

- are being promoted within the organisation
- are represented at all levels of the organisation
- receive an equivalent rate of pay to other employees
- experience higher levels of absenteeism, stress or bullying and harassment than their colleagues
- take up training opportunities
- disproportionately face disciplinary action

## KEY THINGS TO REMEMBER:

- Explain why you are collecting the data and exactly what it will be used for.
- Reassure employees that their confidentiality will be respected. Explain exactly how the data will be stored and who will have access to it.
- Make it as easy as possible for employees to fill in and update their monitoring data themselves. This will improve the response rate.
- Update your IT system if possible but remember this can also be achieved using robust paper filing systems.

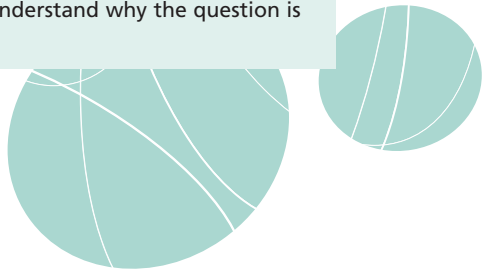
Some employers attach monitoring data to the HR files of employees, allowing patterns to be analysed, such as length of time in current grade, terms of employment, earnings and benefits. Some employers do this from application, allowing them to track


the sexual orientation of candidates at each stage of the recruitment process and, where successful, attaching the data to the new starter's confidential HR record. If this isn't possible, staff should be asked to provide monitoring information at induction and given regular opportunities to update or amend their monitoring information during their employment.

Increasingly, employers are allowing employees to update their monitoring information on their own HR record, as this can significantly increase the rate of disclosure. The best employers make sure all staff can update their record, including employees who wouldn't usually have access to a computer.

**Barclays** upgraded its recruitment and HR system in 2010 to record applicants' sexual orientation when they apply for roles at Barclays. The system enables Barclays to track applicants through each of the recruitment stages – application, shortlist and job offer. This monitoring information is retained in the HR system when an applicant is hired. Applicants have the option 'prefer not to say' but are strongly encouraged to declare.

**Baker & McKenzie** introduced a self-service HR system in 2009, so that all employees have control of their monitoring data and are able to update their own profile. The firm asks all staff to check and update their details on an annual basis. This allows anyone who has previously indicated that they prefer not to declare their sexual orientation the opportunity to update their details. Each year, the firm assures staff of data confidentiality and has used its quarterly newsletter to give greater visibility to lesbian, gay and bisexual equality issues. This helps employees understand why the question is being asked.





For employers that operate globally, there may be challenges to collecting sexual orientation monitoring data in some of the regions in which they are based. In some countries it may be inappropriate or unsafe for individuals to disclose their sexual orientation in monitoring exercises. In other countries, such as France, there are legal restrictions on collecting information relating to sexual orientation. The best global employers incorporate flexibility into monitoring systems, to allow a sexual orientation question to be asked in those regions where it is appropriate and safe to do so.

**Barclays** undertakes an annual worldwide Employee Opinion Survey, and has included a monitoring question on sexual orientation in the UK since 2006. Following the success of gathering the data in the UK, the bank introduced a programme to roll out full diversity monitoring to its other territories worldwide. Its UK-based diversity leads consulted with colleagues around the world, starting from the premise that a question on sexual orientation would be included unless there was a valid legal or cultural objection.

Working with both local HR contacts and members of its global network for lesbian, gay, bisexual and transgender employees, Spectrum, Barclays was successful in introducing the question in over half of the territories in which the bank operates. This has allowed the bank to gain valuable insight into the experiences of its lesbian, gay and bisexual employees worldwide.

**Ernst & Young** recently upgraded its HR system in the UK to adopt a global system used by the firm worldwide. Since the firm had been collecting monitoring data in the UK for some time, including in relation to sexual orientation, UK staff pushed for the global system to be adapted to capture this information. Flexibility was built into the system so that a question about sexual orientation, along with other monitoring questions, can be activated in those countries that wish to ask them. The UK Diversity and Inclusiveness team has begun to encourage colleagues in other countries to make use of the monitoring questions where appropriate. This has been a useful opportunity to share good practice with colleagues in other parts of the world. Those countries where it would be unsafe or inappropriate to ask about sexual orientation are unaffected by the change.

# Monitoring customers and service users

## WHAT IT IS:

- Asking customers and service users monitoring questions when they have bought a product or used a service, for instance in anonymous complaint forms or customer satisfaction surveys.
- Alternatively, this can involve collecting and retaining monitoring information about regular service users or customers, where appropriate.

## WHY MONITOR THIS WAY?

- Anonymous monitoring data can be cross-referenced with customers' responses about whether they are satisfied with the product or service they've received.
- Monitoring regular customers and service users enables organisations to target services to customers, where appropriate, on the basis of their sexual orientation.

## THE DATA CAN TELL YOU WHETHER LESBIAN, GAY AND BISEXUAL PEOPLE:

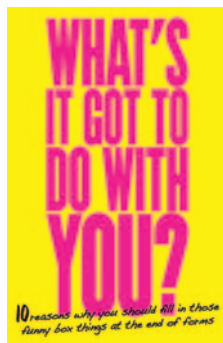
- are accessing services
- make more complaints than other customers and service users
- are satisfied with the level of service they receive
- buy particular products more or less than heterosexual people

## KEY THINGS TO REMEMBER:

- Explain why you are collecting the data. Services users and customers can be sceptical about monitoring so it's vital they understand why they are being asked the question.
- Separate anonymous monitoring data from any information that identifies individuals, and collate and analyse it separately.
- If asking monitoring questions of regular service users and customers with the intention of keeping the data on file, be very clear about how the data will be stored and who will have access to it.
- Provide training to staff who have to ask the question face-to-face. Staff should be able to answer difficult questions about why they are asking for the information.
- Be very clear that providing the information is voluntary. Always give customers and service users the option 'Prefer not to say'.

Finding out how many lesbian, gay and bisexual people are using services, how they use them, and what they think of them enables organisations to identify and address areas for improvement.

It's important that organisations clearly communicate the reasons for monitoring to customers and service users and emphasise that the data will be held confidentially. Members of the public may feel uncomfortable disclosing their sexual orientation in a monitoring form if it's not made clear why the question is being asked or they're not confident their privacy will be protected. Organisations should emphasise that the data will be used to improve services. Any past improvements made as a result of monitoring should be publicised to encourage future disclosure.



Stonewall's Plain English guide *What's it got to do with you?* explains to customers and service users why organisations collect monitoring data and why it's important to provide the information. The guide is free to download from the Stonewall website.

In some cases staff may be required to ask service users monitoring questions face-to-face. Some employees may initially feel uncomfortable asking a question about sexual orientation. Staff should receive training on how to ask the question sensitively, and should be able to answer difficult questions about why the organisation is asking for the information.

**Southend-on-Sea Borough Council** monitors sexual orientation across many of its services as part of its work around measuring customer satisfaction. Service users have the opportunity to provide feedback at terminal points in customer areas after they've received a service, and can also register their experiences online. The data is entirely anonymous, since service users are not asked to provide any personal details. This enables the council to capture lesbian, gay and bisexual service users' experience and to improve and target services as a result.

In some cases it can be useful to collect and hold monitoring data about regular customers or service users. This enables organisations to target services at lesbian, gay and bisexual people, for example by inviting them to join a lesbian, gay and bisexual user group. Holding data in this way is different to asking service users to disclose their sexual orientation in anonymous surveys. Organisations should be explicit with service users about how the data will be stored and who will have access to the information.

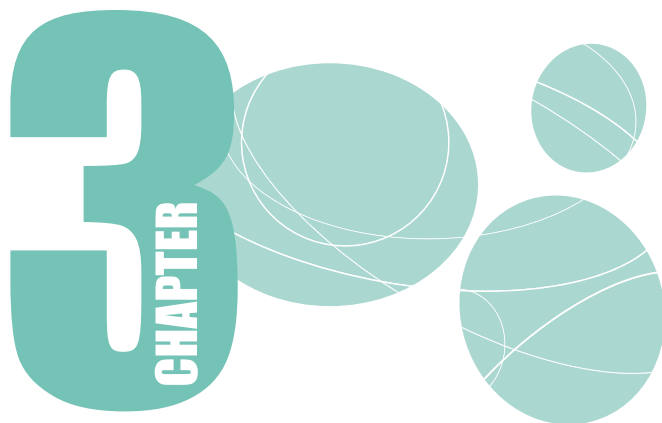
**Nottinghamshire Healthcare NHS Trust** introduced monitoring of patients’ sexual orientation in 2009 after identifying lesbian, gay and bisexual issues as a gap in the national data set. Monitoring was introduced for new and existing patients as a paper form administered by front-line staff, when appropriate. This data is then linked confidentially to the patient’s electronic care record and used to support patients’ needs and identify any gaps in service delivery.

Where customers or service users are asked a separate monitoring question about marital status, it’s important that individuals have the option of declaring they are in a civil partnership. Failing to do so can be seen by lesbian, gay and bisexual customers as an indication that an organisation doesn’t recognise it has gay customers, and has caused some organisations to receive negative publicity. Including civil partnership in questions about marital status sends a strong signal to all customers that an organisation values the lesbian, gay and bisexual people who buy its products or use its services.

It’s important that individuals have the option of simply declaring that they are ‘Married/in a civil partnership’. This allows individuals to answer the question without disclosing their sexual orientation and encourages a higher response rate.

In its mortgage application forms, **Clydesdale Bank** asks customers to declare their marital/civil partnership status by providing one box for ‘married/civil partnership’.

Are you	single	<input type="checkbox"/>	married/civil partnership	<input type="checkbox"/>	separated	<input type="checkbox"/>
	widowed	<input type="checkbox"/>	divorced/dissolved	<input type="checkbox"/>	with partner	<input type="checkbox"/>
Number of dependants		<input type="text"/>				
Gender of applicant			Male	<input type="checkbox"/>	Female	<input type="checkbox"/>



There are lots of things organisations can do to make sure they take full advantage of monitoring exercises. By taking steps to create supportive workplaces for lesbian gay and bisexual staff, employers can significantly increase the rate of disclosure. This is vital, since monitoring data is only truly useful once employees are willing to respond to monitoring questions in sufficient numbers. This chapter includes lots of practical tips and best practice examples of how to encourage lesbian, gay, bisexual and heterosexual employees to respond truthfully to monitoring exercises.

The smaller the number of employees that work for an organisation, however, the greater the risk that individuals may be identified by monitoring data. For very small organisations, monitoring sexual orientation may not be appropriate, since the risk of being outed may put lesbian, gay and bisexual employees off answering the question.

## Setting clear aims

Monitoring for its own sake is generally unsuccessful. Before conducting any monitoring exercise, it's important that employers identify why they want to ask about sexual orientation, what they want to find out and what they will do with the information. Setting clear aims and objectives encourages buy-in from senior

management, which is vital for monitoring to be effective. Being clear about why the organisation is asking the question also helps staff answer queries from colleagues, customers and service users about monitoring.

The Three Year Strategic Plan of **North Wales Police** sets out the force's objectives to:

- *Ensure that people have trust and confidence in North Wales Police*
- *Deliver a quality service that meets the needs of our communities*
- *Provide a well led, organised and skilled workforce*

The force has developed a comprehensive action plan outlining how data collection helps meet these strategic objectives. This includes an action to enable staff to update their sexual orientation data themselves in order to increase trust and confidence.

## Communicating why you're monitoring

Once an organisation has established why it wants to collect workforce data on sexual orientation, it's vital that the reasons for monitoring are explained clearly to all staff. Employers should emphasise that sexual orientation monitoring is an important means of improving the workplace for lesbian, gay and bisexual staff. This helps staff understand why the organisation is asking the question and encourages employees to take part. The best employers give concrete examples of how previous monitoring exercises have brought about positive change in the workplace.

Senior management play an important role in emphasising the importance of monitoring and encouraging staff to complete monitoring exercises. The best employers encourage staff at the very top to promote monitoring exercises throughout the organisation. This lends credibility to monitoring and emphasises how it contributes to achieving business objectives.

Before launching its biannual staff survey, **Clydesdale Bank** makes sure that all staff understand why monitoring questions are included. Through conference calls and weekly briefing sessions, the bank outlines the actions and outputs from the previous survey. The briefing session for the most recent survey highlighted that a staff network had been established for lesbian, gay, bisexual and transgender employees, in response to findings from the previous survey that the bank needed to do more to support these employees.



# I would describe my sexual orientation as:



We'd like to know if we're as open a business as we think we are

If we can see the bigger picture of everyone who works here, the more we know where to focus our efforts and support to ensure this is a great place to work. From understanding how open we are as a business to finding out how we can be more family friendly, there is so much we could offer in the future. Be counted - be part of ITV.

Return your form by 19 August 2011

**one** insight  
**itv**

ITV initiated a full census audit of all employees to capture their full monitoring data, driven as a 'must return' campaign – contacting individuals directly if forms were not returned. During the census period, ITV ran an organisation-wide poster campaign to drive participation and encourage better awareness of the purpose of monitoring.

Communicating the reasons for monitoring is equally important when asking customers and service users to provide monitoring information. Many people can be sceptical about providing this information if it's not clearly explained what the organisation is planning to do with the data. Organisations should make it very clear that the data will be used to improve services.

Stonewall has produced Plain English guidance explaining the rationale for monitoring in a clear and straightforward way. *What's it got to do with you?* helps people understand why they might be asked to complete monitoring forms and why it's important to fill them in.

**Metropolitan** commissioned Stonewall to print over 15,000 copies of its *What's it got to do with you?* booklet, badged with the company's logo. These were initially circulated to staff directly involved in the collection of customer monitoring data, and then distributed more widely to all offices. The booklet was also circulated electronically in order to reach more remote offices. The booklet was made available to customers in reception areas and at the point of tenancy sign-up, along with Metropolitan's monitoring questionnaire. This was to ensure that customers understood at the earliest opportunity why the monitoring questions were being asked, in order to get the highest possible return.

## Consulting with staff

It's important to reassure lesbian, gay and bisexual staff prior to monitoring that the exercise will be valuable and confidential. Lesbian, gay and bisexual staff may have particular concerns about privacy, particularly if they are not out to their manager or colleagues. It should be emphasised that monitoring is not about asking them to be out in the workplace but about collecting statistical data that will be used to make general improvements.

Consulting with a lesbian, gay and bisexual staff network is a good way of seeking advice on how and what to monitor. Network members will have a unique insight into workplace culture and will be well placed to offer advice on the most appropriate questions to ask, as well as to highlight concerns and challenges the organisation may not have thought of. They can also play a vital role in promoting monitoring exercises amongst staff.

Other staff networks, such as those for black and minority ethnic employees or employees with disabilities, can also play a role in sharing their experiences of equality monitoring. They are likely to have dealt with similar challenges to those relating to sexual orientation monitoring.

## Asking the question appropriately

The way in which the question is asked is extremely important. Inappropriate language can deter people from answering the question. Terminology to describe sexual orientation can vary and it's important to recognise that not everyone within the lesbian, gay and bisexual community identifies in the same way. A suggested way of phrasing the question, based on Stonewall's work with over 600 employers, can be found on the opposite page.

Monitoring questions about gender identity and sexual orientation should be kept separate. Trans people, like the rest of the population, may be attracted to people of the same or opposite gender, to both or even to nobody. For further information on monitoring gender identity, contact the Gender Identity Research and Education Society – [www.gires.org.uk](http://www.gires.org.uk); [info@gires.org.uk](mailto:info@gires.org.uk).

Some organisations ask a monitoring question about civil partnership/marital status. It's important that civil partnership is always included and that the available categories don't make a distinction between being married or being in a civil partnership – individuals should have the option of simply declaring that they are 'Married/in a civil partnership'. This allows individuals to answer the question without disclosing their sexual orientation and will encourage a higher response rate.

Some women refer to themselves as gay women so it's important to allow them to do so. Some organisations provide just one option for Lesbian/ Gay and cross-reference the results with their data on gender in order to examine differences in experiences between gay men and gay women.

Organisations should cross-reference this with the data on gender to examine differences between bisexual men and bisexual women.

**What is your sexual orientation?**

- ☐ Bisexual
- ☐ Gay man
- ☐ Gay woman/lesbian
- ☐ Heterosexual/straight
- ☐ Other
- ☐ Prefer not to say

Some people identify their sexual orientation in a different way so it's important to include 'Other'. Some organisations also include a free-text space for staff to indicate how they identify.

It's perfectly acceptable to say heterosexual/straight, since many people are unfamiliar with one or other of these terms.

People should be given the option not to identify their sexual orientation. It's especially important when IT systems require individuals to provide an answer to the question before moving onto the next. This category should be used consistently across all diversity questions, not just sexual orientation. Over time, as staff confidence in monitoring grows and disclosure rates increase, some organisations have found that the 'Prefer not to say' option can be removed.

## Maintaining confidentiality

Even when monitoring exercises are anonymous, confidentiality can be a concern for many lesbian, gay and bisexual people. If people fear that disclosing their sexual orientation for monitoring will out them or expose them to gossip or harassment, they will not do so.

The best organisations state unequivocally that monitoring data will be totally secure, outlining how they will handle the data and making clear exactly who will have access to it. If the data is going to be published, employers must take steps to ensure that this doesn't identify any individual and this should be clearly explained to staff.

The Data Protection Act requires organisations to handle individuals' personal data appropriately, and defines sexual orientation as 'sensitive personal data'. This means it needs to be treated with greater care than other personal data. Disclosing someone's sexual orientation to others without their consent could also constitute harassment.

Most employers have secure systems for storing confidential information that can be adapted to store sexual orientation data. Outdated IT systems should not delay sexual orientation monitoring; secure paper systems can be used until IT systems can be upgraded.

Staff monitoring data about sexual orientation is captured on the **Home Office's** HR system. The information is heavily restricted and only available to a handful of HR personnel who are responsible for producing statistical reports. Access to the data requires personal approval from the head of the diversity team, and it is a sackable offence to disclose information of this kind. When the system was first introduced the Home Office made a concerted effort to communicate this to all staff, emphasising that the data is held securely and only used for statistical analysis.

During the last push to update employee monitoring data at **Metropolitan**, the Chief Executive sent an email to all staff making clear that only authorised staff in HR have access to personal information and that managers only have access to contact information. The chair of the lesbian, gay and bisexual staff network posted a message on the staff intranet, explaining the benefits to employees of updating their data and emphasising that the data is held confidentially. The housing provider also includes a data protection statement in its monitoring questionnaire for service users. This makes clear that monitoring data, including in relation to sexual orientation, will be stored securely and in accordance with the requirements of the Data Protection Act.

## Training staff

All staff involved in conducting sexual orientation monitoring exercises should receive training on why the data is being collected and how to handle the data, including how to answer difficult questions from colleagues. Staff handling monitoring data should receive training on confidentiality and data protection, to ensure that employees' privacy is fully protected.

Staff who have to ask monitoring questions of customers or service users face-to-face should be trained how to ask the question sensitively. All staff should be able to answer difficult questions from the public about why the organisation wants the information.

**Nottinghamshire Healthcare NHS Trust** led seminars for employees on the importance of collecting data and the particular sensitivity of asking about sexual orientation. To improve employees' confidence in collecting data, they are provided with guidance on three ways of asking the question – either as a formal monitoring question, as a more conversational question or in easy read format. The Trust also ensures that all staff have copies of *What's it got to do with you?*, to help answer patients' questions about the reasons for monitoring.

Line managers play an important role in implementing workforce monitoring exercises and communicating the results. Managers should receive training so that they can cascade information about monitoring exercises and answer difficult questions from team members. Some organisations include information about sexual orientation monitoring in equality and diversity training and staff inductions. This is a useful opportunity to show all staff a sample monitoring form, and to explain to them the reasons for monitoring.

Prior to implementing a demographic census of staff, **ITV** undertook briefings with line managers to highlight the impact of the Equality Act 2010. Current monitoring data was shared with participants and the issues that arose, to help managers communicate accurately with their teams about the census. Stonewall's *What's it got to do with you?* booklet was used to assist with this message. To support managers following the briefing, ITV provided a Q&A that they could share with their team members.

## 4 CHAPTER

Once an organisation has collected monitoring data, it's vital that the data is analysed to identify both problem areas and successes in order for the exercise to be meaningful. Monitoring is not a stand-alone exercise in and of itself, but a useful indicator of where to focus further work on lesbian, gay and bisexual equality. Organisations should refer back to their initial aims and objectives for collecting the data.

Lesbian, gay and bisexual people, as well as heterosexual people, may be initially cautious about disclosure. This is particularly the case if the organisation is not seen as gay-friendly. Some organisations may receive a low response rate to the sexual orientation question when it is first introduced; many find it takes up to five years to get meaningful data from monitoring exercises. For this reason it's important to treat initial data with caution and not jump to any conclusions. If necessary organisations should undertake work to improve the response rate before making long term decisions.

The response rate and the reliability of the data should improve as trust in the organisation's commitment to tackling discrimination increases. Increases in disclosure rates can signify that staff, customers and service users believe in the organisation's commitment to lesbian, gay and bisexual equality and trust that the data will be used meaningfully. It must never be assumed that a person is gay because they have selected 'Prefer not to say'; heterosexual people may not feel comfortable disclosing their sexual orientation either.

A low response rate can however be indicative. It may indicate that certain groups of people aren't comfortable sharing the information with their employer or service provider. Further work may be needed to convince people that the organisation is committed to lesbian, gay and bisexual equality. A low response rate amongst a particular department or division may even suggest that there is a problem in a particular area of the business.

**Nottinghamshire Healthcare NHS Trust** undertakes an annual data validation exercise of its employee monitoring data. Every member of staff is posted a confidential form containing their recorded demographic details, including their sexual orientation. They are asked to confirm the details, or update where necessary. This process ensures that data is accurate and up-to-date, as well as giving staff who may not previously have had the confidence to declare their sexual orientation an opportunity to update their details. If any section is left blank, the form is returned until they have completed the demographic section, even if it is to state that they prefer not to say. This process, undertaken over three years, improved the Trust's declaration rate for sexual orientation from less than 5% to 75%.

The **Home Office** requires all employees to enter their monitoring data – including in relation to sexual orientation – on the HR system, with the option of declaring 'prefer not to say'. The diversity team found that the proportion of staff choosing 'prefer not to say' was notably higher in some regions of the country than in others. Identifying this as a measure of lack of confidence, they responded by targeting communications about lesbian, gay and bisexual equality in these regions, for instance by carrying out bullying and harassment workshops and running a poster campaign about lesbians in the workplace. The proportion of 'prefer not to say' responses has begun to decline in those regions, resulting in better workforce data about lesbians in particular.

If organisations continue to get a low response rate over time, monitoring data can be supplemented by consulting further with staff, customers or service users. Monitoring, although helpful, is not the only way of identifying problems in the workplace. Employers might consider consulting with a lesbian, gay and bisexual staff network or undertaking qualitative research into the experiences of lesbian, gay and bisexual staff.

Even once organisations have achieved a high response rate, they should still be cautious when handling small data sets. This might be the case, for instance, if there are very few staff members from a particular ethnic background. It's important not to draw broad

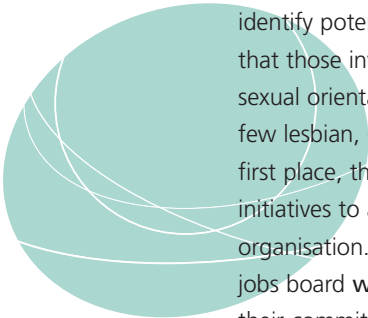


conclusions based on the experiences of only a handful of people who identify in a particular way. Organisations should concentrate on findings that clearly show significant disparities between different groups. The underlying principle of analysing monitoring data is to identify broad trends, particularly where this identifies a disproportionate impact on a particular group of people within the workforce.

## Analysing the data and taking action

Once sexual orientation monitoring is well established it can be used as an important benchmark to reveal the proportion of lesbian, gay and bisexual staff in an organisation. If the percentage of staff identifying as lesbian, gay and bisexual is much lower than the Government's estimate of six per cent, this might indicate that more work needs to be done to ensure adequate representation within the organisation. Before introducing targets like this, many organisations focus on evidence of staff satisfaction and workforce distribution.

### **RECRUITMENT MONITORING:**



Monitoring data collected during recruitment should be analysed to identify potential barriers in the recruitment process. This can signal that those involved in the selection process need further training on sexual orientation issues. If recruitment monitoring reveals that very few lesbian, gay and bisexual candidates are applying for jobs in the first place, the best employers respond by undertaking targeted initiatives to attract lesbian, gay and bisexual people to the organisation. This might include advertising on Stonewall's online jobs board [www.proudemployers.org.uk](http://www.proudemployers.org.uk) or publically championing their commitment to lesbian, gay and bisexual equality.

### **CONFIDENTIAL HR RECORDS:**

The best organisations break down workforce monitoring data by sexual orientation and seniority and cross-reference it with other data sets such as those relating to appraisals, staff turnover and pay audits. If analysis of the data identifies any barriers to career development for lesbian, gay and bisexual staff, this may signal to an employer that they need to introduce targeted development

programmes, such as Stonewall's Leadership Programme.

Employers should also cross-reference monitoring data with other records, such as those relating to absenteeism or bullying and harassment. This might establish, for example, that a higher rate of lesbian, gay and bisexual people experience bullying in the workplace. In response an organisation may want to ensure staff have access to counsellors trained in lesbian, gay and bisexual issues and promote the organisation's zero tolerance policy on anti-gay bullying and harassment more widely. Employers should complement this by asking monitoring questions whenever incidents of bullying and harassment are formally reported.

**Baker & McKenzie** undertakes an annual review of appraisal grades by diversity strand to identify any patterns or concerns for minority groups. A report is produced to show how those within each diversity strand, including lesbian gay and bisexual employees, perform against the average appraisal grade.

**Nottinghamshire Healthcare NHS Trust** uses its employee monitoring data to analyse any patterns in the sexual orientation of staff involved in employee relations cases, such as formal grievances, disciplinary action and harassment claims. Anonymised data is scrutinised by the Equality and Diversity Sub Committee of the Trust Board every six months in order to identify where appropriate interventions or further analysis may be required. This data is supplemented by information from the Trust's confidential Anti-Bullying, Harassment and Discrimination support line.

**St Mungo's** analyses its staff monitoring data annually to determine the distribution of lesbian, gay and bisexual staff by grade and by pay. In response to findings that the Senior Management Team was not representative of the organisation as a whole, the charity introduced a mentoring programme to increase the diversity of senior management. The programme works with staff from minority groups, including lesbian, gay and bisexual staff, supporting them to develop the skills and confidence they need to move into senior management positions. Mentees are given the opportunity to stipulate whether they would prefer a lesbian, gay or bisexual mentor.

## STAFF SATISFACTION SURVEYS:

Anonymous staff surveys should be analysed to evaluate levels of job satisfaction amongst lesbian, gay and bisexual staff. If significantly more employees identify as lesbian, gay and bisexual in an anonymous staff survey than are identified by HR records, more work may need to be done to make lesbian, gay and bisexual staff feel it's safe to be out in the workplace. Likewise, if more instances of anti-gay bullying are identified in a staff survey than have been formally reported, work may be needed to improve reporting mechanisms and encourage reporting.

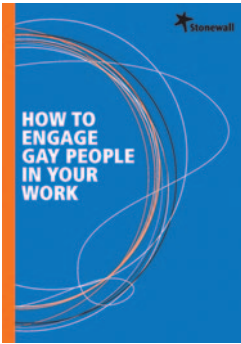
**North Wales Police** conducts an annual Cultural Survey which asks about equality of opportunity in career progression and includes monitoring questions. The force compared the results of its most recent Cultural Survey with the findings of Stonewall's Workplace Equality Index staff survey and its Employment Monitoring Report, populated from HR records. This identified a low disclosure rate among lesbian, gay and bisexual staff. The force agreed a number of actions, including introducing self-completion monitoring and better explaining why the force collects personal data. This included using the Stonewall guide *'What's it got to do with you?'*.

**Metropolitan's** analysis of its most recent Employee Engagement Survey found staff satisfaction levels for lesbian, gay and bisexual staff were generally lower than for heterosexual staff. The most significant concerns were around bullying and harassment. In response the Chief Executive, together with senior staff and the chair of the lesbian, gay and bisexual staff network, reviewed the organisation's bullying and harassment policy. The policy was amended to place greater emphasis on 'zero tolerance' and to improve support for staff.

## CUSTOMER AND SERVICE USER MONITORING:

As with staff monitoring, it's vital that monitoring data collected about customers or service users is used meaningfully. Organisations should analyse the data to find out whether lesbian, gay and bisexual people are accessing services, and take action to address any disparities in customer satisfaction rates.

The data can also be used to target services at lesbian, gay and bisexual people, where appropriate. This enables organisations to improve services and increases confidence and loyalty amongst lesbian, gay and bisexual customers and service users.



Stonewall's guide *How to engage gay people in your work* includes lots of practical recommendations and case studies about working with lesbian, gay and bisexual people in local communities. The guide is free to download from the Stonewall website.

**Metropolitan** collects customer monitoring data, including about sexual orientation, of all its residents and service users, as well as those making enquiries about services. The Home Ownership team recognised that a significant proportion of people making enquiries about their services were lesbian, gay or bisexual. In response, the housing provider included images of same-sex couples in its advertising in order to attract even more interest from this client group. This resulted in an increased number of enquiries from potential lesbian, gay and bisexual customers, who were then invited to attend a focus group. The findings from this initial focus group informed the housing provider's marketing strategy and Service Improvement Plans.

**Southend-on-Sea Borough Council** has used its service user monitoring data as an evidence base to demonstrate a sizeable lesbian, gay and bisexual population in Southend, and to demonstrate the demand for putting on buses for the local community to Essex Pride in Chelmsford. Analysis of the data also demonstrated to the council's transport team that lesbian, gay and bisexual people were cycling more than other groups. The council responded to these findings by promoting community cycling events in gay venues in Southend, in order to make those events more representative of the local community and to signal to lesbian, gay and bisexual people that they would be welcome.

## Analysing differences between lesbian, gay and bisexual people

When analysing monitoring data, it's important to compare the results between lesbian, gay and bisexual people, rather than treating them as one homogenous group. Where data sets are large enough, it can also be useful to look for any significant differences between lesbian, gay and bisexual people who share other characteristics such as ethnicity, religion or belief or disability.

**Baker & McKenzie** found from its employee monitoring data that no lesbians or bisexual women were willing to declare their sexual orientation in monitoring exercises. In response the firm invited gay and bisexual women to give confidential feedback on the support Baker & McKenzie was providing. They found that lesbians and bisexual women were more likely to be involved in BakerWomen, Baker & McKenzie's women's network, and had specific concerns about being outed if they joined the lesbian, gay, bisexual and transgender network, BakerLGBT. The firm devised an 'ally' programme so that women could join BakerLGBT without outing themselves as lesbian or bisexual. BakerLGBT also engaged more closely with BakerWomen and BakerBalance, a network focusing on work/life balance, to discuss cross-cutting issues. As a result the network gained female members and recruited a bisexual woman to lead a BakerLGBT work group.

## Reporting findings

It's important to report internally on workforce monitoring. Detailed reports should be submitted to senior management so that they can endorse any actions required in response to the findings. Internal benchmarks should be set on how to improve performance on lesbian, gay and bisexual equality. Reports should be submitted – and monitoring exercises conducted – at regular intervals in order to track progress against those benchmarks over time.

**Ernst & Young** presents detailed reports of its biannual staff survey analysis to the Diversity and Inclusiveness Leaders' Forum, a group comprised of representatives from each of the firm's service lines and a Board member. This includes summary reports for each service line and an in-depth report on the specific findings in relation to sexual orientation. The relevant leader for each service line is held accountable for addressing any disparities in the data.

Individuals should not be identifiable from reports and only limited personnel should have access to the raw data. Findings from small data sets should be omitted from reports, or aggregated with other data to protect confidentiality. This helps maintain staff confidence in monitoring and ensures compliance with the Data Protection Act.

The main findings, including actions taken, should be made available to all staff, for example through the intranet or newsletters. Being able to demonstrate positive changes as a result of sexual orientation monitoring encourages increased response rates in future exercises. It's key to report back to network groups too, since they can help organisations interpret the data.

The **Home Office** publishes a monthly bulletin on the staff intranet, which includes information about the representation of lesbian, gay and bisexual staff at different grades within the organisation. This is presented alongside targets for lesbian, gay and bisexual representation in senior levels of the organisation, which are agreed together with the Home Office's diversity strategy board and the lesbian, gay and bisexual staff network, Spectrum. The target for 2013 was achieved a year ahead of schedule.

**North Wales Police** compiles an annual Employee Monitoring Report which is published in both English and Welsh on the force intranet. An Employee Monitoring Group is responsible for collating the data, publishing the report and consulting with staff on findings. Before the report is circulated more widely, it is shared with the Gay Police Association for comments and feedback. All comments are then drawn together in an action plan.

The best employers compile monitoring reports with divisional or regional breakdowns, and disseminate the information to teams through local managers. If the analysis finds barriers for lesbian, gay and bisexual employees in a particular area of the business, the relevant manager should be accountable for making improvements.

Following its annual Employee Opinion Survey, each business area of **Barclays** is provided with an analysis of lesbian, gay and bisexual responses compared to heterosexual responses to help identify gaps and areas of concern. Each area of the business creates plans to improve engagement levels for staff, including in relation to diversity. One activity resulting from regional monitoring was Barclaycard holding regional focus groups with lesbian, gay and bisexual staff to understand what was influencing their lower level of engagement.

The best organisations publish sexual orientation monitoring data externally. This signals that an employer takes its equality commitments seriously, particularly when this shows improvements over time. Individuals must never be identifiable in public reports.

The **Home Office** publishes a comprehensive annual Employment Monitoring Report on its website. The report includes information about the overall representation of lesbian, gay and bisexual people working for the Home Office and their representation in senior positions. The report provides further statistical information about lesbian, gay and bisexual employees, including in relation to promotions, bonuses, take-up of training opportunities, sick absence, career breaks, disciplinary action, bullying and harassment and those leaving the organisation.

# TOP TEN TIPS

- 1 ESTABLISH YOUR AIMS AND OBJECTIVES** before monitoring sexual orientation. Know why you are monitoring and what you want to find out.
- 2 COMMUNICATE THE PURPOSE OF SEXUAL ORIENTATION MONITORING** to the wider workforce and the local community, especially to lesbian, gay and bisexual staff, customers and service users. Provide in-depth training to staff responsible for collecting the data.
- 3 MAINTAIN CONFIDENTIALITY** by putting systems in place to store the data securely. Be clear with staff, customers and service users about how privacy will be protected and how findings will be reported back.
- 4 GAIN THE SUPPORT OF SENIOR MANAGEMENT** to demonstrate to the wider workforce and the local community that sexual orientation monitoring is an essential component of promoting lesbian, gay and bisexual equality.
- 5 CONSULT WITH LESBIAN, GAY AND BISEXUAL STAFF** to establish the best way to introduce sexual orientation to your existing monitoring procedures.

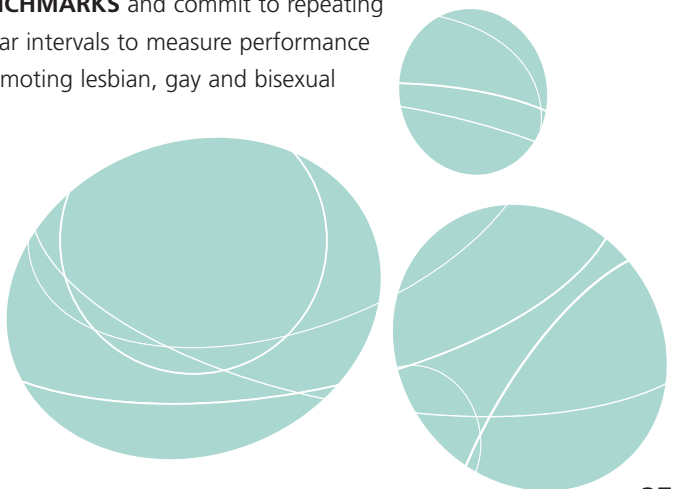
**6 IMPROVE DATA COLLECTION** by making it as easy as possible for people to provide their monitoring information. Develop IT systems for gathering sexual orientation monitoring data and implement self-completion mechanisms to encourage disclosure.

**7 ANALYSE THE DATA** to identify problem areas and successes. Cross-reference sexual orientation monitoring data with existing data sets to take full advantage of all the data available to you.

**8 TAKE ACTION** to address any issues revealed by monitoring. Communicate positive changes made as a result of sexual orientation monitoring to staff, customers and service users to encourage participation in future monitoring exercises.

**9 REPORT FINDINGS** to senior management, as well as to all staff and to those outside your organisation. Ensure individuals cannot be identified from any published findings.

**10 SET INTERNAL BENCHMARKS** and commit to repeating the exercise at regular intervals to measure performance and progress on promoting lesbian, gay and bisexual equality over time.





**Stonewall Diversity Champions programme**

Stonewall’s Diversity Champions programme is Britain’s good practice forum through which major employers work with Stonewall and each other on sexual orientation issues to promote diversity in the workplace. [www.stonewall.org.uk/dcs](http://www.stonewall.org.uk/dcs)

**Workplace Equality Index**

The Workplace Equality Index is Stonewall’s comprehensive annual benchmarking exercise that showcases Britain’s top employers for lesbian, gay and bisexual staff.  
[www.stonewall.org.uk/wei](http://www.stonewall.org.uk/wei)

**The Stonewall Leadership Programme**

The Stonewall Leadership Programme provides a unique space to look at questions around sexual orientation and authenticity and how these can be used to develop an individual’s leadership abilities. [www.stonewall.org.uk/leadership](http://www.stonewall.org.uk/leadership)

**What’s it got to do with you?**

Stonewall has produced guidance for customers and service users explaining why organisations collect monitoring data and why it’s important to provide the information.  
[www.stonewall.org.uk/wigtdwy?](http://www.stonewall.org.uk/wigtdwy?)

**Making the most of monitoring**

Stonewall Scotland has produced good practice guidance for public sector organisations on service user monitoring. [www.stonewallscotland.org.uk/monitoring](http://www.stonewallscotland.org.uk/monitoring)

**Stonewall Workplace Guides are free to download from**  
[www.stonewall.org.uk/workplace](http://www.stonewall.org.uk/workplace)

**Also in this series of Workplace Guides:**

- |                                 |                                  |
|---------------------------------|----------------------------------|
| Network Groups                  | Bisexual people in the workplace |
| Monitoring (2006)               | Marketing                        |
| Bullying                        | Straight Allies                  |
| Career Development              | Procurement                      |
| Religion and Sexual Orientation | Global Working                   |

**Thank you to all those who participated in this guide**

# **USING MONITORING DATA**