INTRODUCTION

Monitoring and consultation are both vital for understanding your lesbian, gay, bi and trans (LGBT) service users and their needs.

Monitoring gender identity and sexual orientation data will give you a broad overview of who’s accessing your service and how satisfied they are. Consultation should complement this, giving you a deeper understanding of any issues or areas of best practice that exist in your service.

MONITORING

WHY MONITOR SERVICE USER DATA?

Monitoring service user data is essential for improving your service for LGBT people. It allows you to:

- Understand who is and isn’t accessing your service
- Find out if LGBT people are satisfied with your service
- Compare engagement and satisfaction with different parts of your service
- Demonstrate that you’re considering LGBT service users’ needs

EQUALITY IMPACT ASSESSMENTS

Equality impact assessments help public authorities meet the Public Sector Equality Duty (as discussed in Step 1), including showing due regard for the need to eliminate discrimination from their services. They should be used to assess the impact of potential policy or funding changes on protected groups, including LGBT communities. The outcome of an equality impact assessment should directly inform the decision-making process.

The different methods of monitoring and consultation set out in this section can be used to ensure a thorough and meaningful equality impact assessment process.
COLLECTING MONITORING DATA

There are a number of different ways to collect data on service users’ gender identity and sexual orientation. Carefully consider what you want to learn from the data and which methods are most appropriate for your service.

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**HOW DO YOU COLLECT THE DATA?**

- **User records**: Ask service users about their gender identity and sexual orientation. Ideally, this should be done when a service user first signs up to the service, but it can also be a yearly exercise to ensure all current service users are included. Only a very limited number of staff should have access to this data, for the purpose of analysis. It should be clearly communicated to the service user how the data will be used. There should be a system in place for service users to update or remove the information if required.

- **Satisfaction surveys**: Ask monitoring questions on gender identity and sexual orientation at the end of satisfaction surveys or interviews. Satisfaction surveys should be anonymous, including monitoring data. This will result in more accurate data because service users are more likely to give their true opinion of the service.

- **Complaints and feedback**: Include monitoring questions on gender identity and sexual orientation in your service’s complaints and feedback process. LGBT service users may be hesitant to declare their gender identity and sexual orientation when submitting a complaint. For example, they may fear the complaint handler will be prejudiced against them. Service users should be assured that the complaint handler will not have access to the monitoring data and it should be analysed separately from the individual’s complaint.

**WHAT DOES THE DATA ENABLE YOU TO DO?**

- **User records**: It allows you to calculate how many LGBT service users access your service and tailor it accordingly. By linking data to service user records, you can analyse which parts of your service are most and least accessed by LGBT service users. You can also look at the frequency of their engagement with specific parts of the service.

- **Satisfaction surveys**: It allows you to measure how satisfied your LGBT service users are compared to other service users. You can also then identify particular areas of your service where LGBT service users are less or more satisfied.

- **Complaints and feedback**: It allows you to find out if LGBT people are making more complaints than other service users. You can also identify some of the specific problems LGBT people are facing. This data will only give a limited picture of LGBT experiences, so it should be used alongside other monitoring exercises.

**HOW DO YOU ANALYSE THE DATA?**

- **User records**: Investigate numbers of LGBT people accessing different parts of your services. You can also break down this data by region and area, looking at where LGBT people are accessing your services.

- **Satisfaction surveys**: Compare the responses of LGBT service users with the responses of other service users. Where possible, compare satisfaction with different areas and touch points of the service.

- **Complaints and feedback**: Identify the proportion of complaints being made by LGBT service users. Compare this with the proportion of your service users who are LGBT (if you collect this data). Look for any trends that suggest LGBT people are receiving a poorer service in a particular area or at a particular touch point.
ASKING THE QUESTIONS

The way service users are asked about their gender identity and sexual orientation is very important. Inappropriate language may deter people from answering the questions, lead people to answer inaccurately or cause offence. It’s important to make diversity questions optional, with a ‘prefer not to say’ option.

REMEMBER: gender identity and sexual orientation are different characteristics. You should always ask about them in separate questions.

Clearly explain why monitoring questions are being asked, how responses will be used, the confidentiality of responses and who will have access to them. If questions need to be asked over the phone or face-to-face, staff should receive training on how to ask sensitively and respond to common questions.

EXPLAIN WHY YOU’RE ASKING

Service users can be hesitant when asked about their sexual orientation, gender identity and other characteristics. Sometimes they worry that their answers won’t be confidential and other times they simply don’t understand why they’re being asked. To encourage high declaration rates, you should proactively respond to these common worries.

One way to do this is by using this template text to create a leaflet. Modify it for your service and make it specific with your own examples. If you’re a Stonewall Diversity Champion, you can request the template from your account manager, or by contacting memberships@stonewall.org.uk.

WHY WE’RE ASKING

When you sign up to our services, or give us feedback, we might ask some extra questions about you. This includes a couple of questions about your sexual orientation and whether you identify as trans¹. Here’s why you should let us know:

WE WANT TO UNDERSTAND THE COMMUNITIES WE SERVE

We ask questions to collect overall statistical information – not to pinpoint individuals. It helps us understand who is and isn’t accessing our services, and how satisfied different groups of people are.

YOUR INFORMATION IS SAFE

There are strict laws to make sure your information is stored safely and responsibly. Your answers are confidential and we’ll always tell you how they’re going to be used before we ask.

HELP US IMPROVE OUR SERVICES

By learning more about the people we serve, we can tailor our services to meet your needs. In the past, we’ve used this information to [insert example from your service].

¹ Trans is an umbrella term to describe people whose gender is not the same as, or does not sit comfortably with, the sex they were assigned at birth.

If you’re not yet a Diversity Champion, discover more about the programme by visiting: www.stonewall.org.uk/dc
BEST PRACTICE MONITORING QUESTIONS

Use the following questions when asking service users about their gender identity and sexual orientation.

ASKING ABOUT GENDER IDENTITY:

WHAT BEST DESCRIBES YOUR GENDER?

- Female
- Male
- Prefer to self-describe: ____________________
- Prefer not to say

DO YOU IDENTIFY AS TRANS?

- Yes
- No
- Prefer not to say

Including a free-text space enables people who don’t identify as male or female to express their gender, for example people who are genderqueer or non-binary.

Here you should consider including a short definition of trans: “Trans is an umbrella term to describe people whose gender is not the same as, or does not sit comfortably with, the sex they were assigned at birth.”

ASKING ABOUT SEXUAL ORIENTATION:

WHAT IS YOUR SEXUAL ORIENTATION?

- Bi
- Gay/lesbian
- Heterosexual/straight
- Prefer to self-describe: ____________________
- Prefer not to say

Gay/lesbian should be included as a single option, rather than having separate options for gay man and gay woman/lesbian. This means that people of all gender identities can choose the option that best suits them.

You can cross-reference gender identity and sexual orientation data to break down responses from different groups e.g. responses from gay men and responses from gay women/lesbians.

TITLES AND GENDER OPTIONS

When signing up for services, service users are regularly asked for their title and gender. Often, the options given exclude non-binary identities. When designing forms, you should carefully consider whether you need this information. If you do, service users should always be given open text boxes to use their own terms.
KEY CONSIDERATIONS WHEN ANALYSING DATA:

RESPONSE RATES
A higher response rate will give a more representative picture of LGBT service user experiences. It should not be assumed that someone selecting ‘prefer not to say’ is LGBT. Low rates of disclosure may indicate that service users don’t understand why they are being asked, or don’t trust that their answers will be treated confidentially.

COMPARING EXPERIENCES WITHIN THE LGBT COMMUNITY
Experiences vary significantly within the LGBT community. Where numbers of respondents allow it, you should break down and compare the responses of different groups within the LGBT community. For example, compare the satisfaction of bi service users to gay service users.

MULTIPLE IDENTITIES
LGBT people, like everyone else, have many parts to their identity which uniquely affect their experiences. You should cross-reference data on gender identity and sexual orientation against each other and against other monitoring data. For example, how many bi men are accessing your services compared to bi women? Or how do satisfaction levels of black, Asian and minority ethnic (BAME) LGBT service users compare to white LGBT service users?

SMALL DATA SETS
When analysing and reporting on small sets of data – both internally and externally – it’s important to be cautious:

- You may risk outing individuals as LGBT or making them identifiable in reports
- You may not be able to reach statistically significant conclusions because of low respondent numbers

When data sets are too small, they should be omitted or aggregated with other data. For example, if your data set is too small to report on trans as a stand-alone group, you should analyse LGBT data as a whole. Or, if your data set is too small to report on LGBT data within a specific part of your service, you should analyse LGBT data across the service as a whole.

REMEMBER: monitoring is not a stand-alone activity. You should consult with your service users to gain qualitative feedback about your service, regardless of your final data set sizes.
Monitoring exercises should be carried out regularly to measure the progress of your work, not just as a one-off exercise. Results should inform ongoing consultations and organisational priorities. Any actions taken as a result of monitoring should be communicated to all service users. If service users see how the data is being used to improve services, they are more likely to disclose their gender identity and sexual orientation in the future.

THE MONITORING CYCLE

DATA COLLECTION
- Asking service users about their gender identity and sexual orientation

COMMUNICATION AND FEEDBACK
- Telling service users about the actions you’ve taken in response to monitoring trends

DATA ANALYSIS
- Identifying significant trends in the data and areas for improvement

PRIORITY AND ACTIONS
- Using trends to shape areas of priority and consultation topics
CONSULTATION

WHY CONSULT LGBT SERVICE USERS?

Consulting your LGBT service users will give you a deeper understanding of any barriers and issues in your service. It will help you to:

- Collect direct feedback about your service provision from LGBT people
- Identify explanations for trends in monitoring data
- Ensure there are no barriers preventing LGBT people from accessing your service
- Shape priorities for your organisation, including content for staff training

RUNNING A CONSULTATION

There are a number of different ways to consult your LGBT service users. These include:

Service user panels

Regular meetings with a fixed group of service users who are consulted on policies and practices. These meetings are also an opportunity for group members to raise ongoing concerns about service provision.

Open public forums

An opportunity for any service user or member of the public to raise concerns about the service. With no fixed agenda, these can allow you to hear about problems you may not have already identified.

Focus groups

Meetings for discussion of a particular policy or issue. They can be used for in-depth discussion on priority areas for your organisation or sector. Topics for discussion should be informed by the results of monitoring exercises.

Open-question surveys

Used to collect more detailed feedback about accessing your service as an LGBT person. Anonymity will encourage responses from people less comfortable attending a face-to-face consultation. Surveys should be sent to all service users to ensure you reach everyone who identifies as LGBT. It’s important that surveys are available in hard copy for service users without computers. If you intend to use any comments for internal or external communications, this should be made clear to all participants.

AD-HOC FEEDBACK

There should be easy opportunities for service users to leave ad-hoc feedback about the service they’ve accessed. For example, some services have comment boxes in their receptions. While these are important and should be checked for LGBT-specific comments, they’re not a substitute for thorough and proactive consultation.
GETTING PEOPLE INVOLVED

PROMOTE THE OPPORTUNITY WIDELY

Use a variety of communication channels to reach all service users – both online and offline. This will ensure you reach those who haven’t previously disclosed that they’re LGBT. This is also valuable for communicating your commitment to LGBT inclusion to all service users, regardless of gender identity and sexual orientation.

ENCOURAGE A DIVERSITY OF VOICES

It’s important to make sure you’re hearing from people with different identities within the LGBT community. You should explicitly promote the opportunity to underrepresented groups.

PARTNER WITH LOCAL LGBT ORGANISATIONS

They will be working with LGBT people in your community, including people who don’t already access your service. Use Stonewall’s ‘What’s in my area?’ directory to help find local organisations.

WORK WITH EXISTING LGBT SERVICE USER GROUPS

For example, some organisations have LGBT patient groups, resident groups or student societies. Where possible, you should work closely with these internal groups when running your consultations.

HOLD TRANS-SPECIFIC CONSULTATIONS

Trans service users are likely to have different experiences and face different barriers to lesbian, gay and bi service users. Separate consultations may not be possible if you only have a small number of service users, in which case you should ensure trans representation in your LGBT consultation. Consider barriers that might prevent trans people from accessing your consultation, for example a lack of inclusive facilities at the venue.

USING THE FEEDBACK

Feedback from consultations should be used to create a clear action plan for your organisation. The outcomes should be shared with relevant teams and used to shape frontline staff training. It’s important that progress is reported back to consultative groups, and to service users more widely. This will ensure future engagement and demonstrate the value of their participation.
Sussex Police recognise that to provide a fully inclusive public service, they need to engage directly with people from the communities they serve. Their LGBT External Reference Group comprises individuals from across Sussex, meeting three times a year. They act as critical friends to test, challenge and inform policing on a wide range of policies and practices.

One of the challenges set by the group was to extend the provision of LGBT Liaison Officers beyond the city of Brighton and Hove. This has ensured the accessibility of support and local contact across the entire county. Another challenge involved discussions around under-reporting of hate crime in licensed venues. The group advised Sussex Police to contact venue managers encouraging them to report hate incidents. This was done with the assurance that increased reports would not reflect negatively on future license hearings.

Sussex Police regularly engage with the LGBT community, to promote themselves as an accessible public service provider, and to keep people safe. They host a public engagement stall each year at Brighton Pride and Trans Pride, as well as attending community events throughout the year such as Transgender Day of Remembrance.

Having a visible presence at these community events has been important in demonstrating their commitment to trans equality. To develop further insight, Sussex Police recently established a trans-specific External Reference Group. They used social media and local press to promote the initiative. They also engaged with local support networks, communities and partners to invite participation. Keen to create a comfortable and open environment, the group began with an informal session at a non-police venue where the processes were shaped in partnership with attendees. Following this, the group has met to develop an approach to exploring issues and promoting good relations between police and the trans community.

Sussex Police commission user satisfaction surveys with a random sample of crime victims. These provide an opportunity for individuals to rate different areas of their experience, as well as give detailed feedback. Group members wanted assurance that LGBT people were receiving an equitable service, so for the first time sexual orientation and gender identity monitoring questions were included as part of these surveys. So far, results indicate that LGBT people have similar levels of satisfaction with their experience compared to the general population.
Tower Hamlets Homes launched their consultation work after identifying that LGBT residents had below average levels of satisfaction and engagement with their services. They began with three focus groups, each involving up to 10 LGBT residents. The focus groups helped develop a clear action plan which was used to improve services.

New customer service training was introduced for all staff, including specific training on hate crime for caretakers. After a suggestion from one LGBT resident, a mystery shopping exercise on hate crime reporting was carried out. This allowed Tower Hamlets Homes to test their standards against five other housing organisations.

Another outcome was a series of ‘LGBT Tea’ surgeries. These were drop-in sessions aimed at engaging LGBT residents in an informal way. Residents could privately raise concerns regarding Tower Hamlets Homes or receive advice on more general housing issues. By working in partnership with a local LGBT organisation, Rainbow Hamlets, and using a space away from their head office, they were able to engage with LGBT service users who wouldn’t have otherwise been in contact.

The focus groups also fed into Tower Hamlets Homes’ broader equalities communications strategy. The aim was to make residents more comfortable reporting LGBT-specific housing issues and more confident approaching staff about general housing problems. Central to this was a poster campaign with the message ‘Everyone is welcome in our neighbourhood’. This was displayed in the six main languages of the borough with the aim of tackling hate crime within all community groups. This message is now used in a number of alternative ways. The statement is displayed on staff ID card lanyards, as well as caretaking and repair staff’s flasks.

Since starting this work, Tower Hamlets Homes has seen a leap in the satisfaction levels of LGBT residents, something they have continued to monitor throughout.
MORE FROM STONEWALL

This is the second step in the Service Delivery Toolkit. For the other steps in this series, visit: www.stonewall.org.uk/servicedelivery

DIVERSITY CHAMPIONS PROGRAMME

Diversity Champions is Britain’s leading programme for ensuring all LGBT people are accepted without exception in the workplace. Join today and receive expert guidance on how to create an equal environment for LGBT staff and service users. We’ll review your policies, give you access to networking with over 700 organisations, and support you every step of the way.

For more information, visit: www.stonewall.org.uk/dc

STONEWALL WORKPLACE CONFERENCES

Held annually in Cardiff, Edinburgh, Manchester and London, Stonewall workplace conferences are Britain’s leading events on LGBT workplace inclusion. Experts bring our guides to life and help you adapt them for your organisation. Sessions cover a range of topics including service delivery, working with limited resources and supporting trans staff and service users.

For more information, visit: www.stonewall.org.uk/workplace-conferences

FURTHER RESOURCES

Stonewall produces a range of best-practice guides and research to help you create inclusive and accepting environments for your staff and service users.

For the full range of resources, visit: www.stonewall.org.uk/workplace-resources

Trans workplace series: Getting it right with your trans service users and customers - DOWNLOAD

Stonewall Scotland: A guide for public authorities on meeting the Public Sector Equality Duty - DOWNLOAD