

# Stonewall Workplace Equality Index 2021

**THIS DOCUMENT IS FOR REFERENCE PURPOSES ONLY.**

Minor edits were made to this document on 27/08/20 to clarify questions and guidance.

Please note: due to ongoing challenges faced by employers in responding to COVID-19, Stonewall is not opening the Workplace Equality Index for submissions in 2020.

This document shows you all the questions we will ask and answers/evidence that we will require for the Workplace Equality Index 2022.

In place of employers' submissions, we are providing a comprehensive series of support throughout the year. The [Workplace Equality Index support series](#) will use these questions as a framework to support employers to continue their LGBT inclusion progress and get them ready for the 2022 Index.

For any queries about the Workplace Equality Index, contact [memberships@stonewall.org.uk](mailto:memberships@stonewall.org.uk).

If you're unsure of any terms within this document, you may want to refer to Stonewall's [glossary of terms](#).

## Section 1: Policies and Benefits

This section examines the policies and benefits the organisation has in place to support LGBT staff. The questions scrutinise the policy feedback process, policy content and provision of specific support.

### 1.1 Does the organisation have a process to ensure all employees can feedback on the inclusiveness of relevant policies (for example, HR policies)?

*Guidance:*

- *This should be open to all employees and across all relevant policies.*
- *Relevant policies include HR policies, for example leave policies.*
- *If feedback does not trigger immediate reviews, there must be regular, periodic policy reviews that consider the feedback.*

Yes  
No

Describe the process, how it is communicated, and what action the feedback triggers (max. 500 words).

Describe any previous outcomes of the process (max. 500 words).

### 1.2 Does the organisation have a policy (or policies) that includes the following? Tick all that apply.

*Guidance:*

- *The policy (or policies) should clearly state that the organisation will not tolerate discrimination, bullying or harassment against employees on the grounds of sexual orientation or gender identity and/or trans identity.*
  - *These may be listed along with other protected characteristics.*
- Explicit ban on discrimination, bullying and harassment based on sexual orientation (bronze award requirement)
  - Explicit ban on discrimination, bullying and harassment based on gender identity and gender expression (bronze award requirement)
  - An example of biphobic bullying or harassment
  - An example of homophobic bullying or harassment
  - An example of transphobic bullying or harassment
  - Clear information about how to report an incident and how complaints are handled
  - None of the above

Upload the selected policies with the relevant sections highlighted.

Provide a brief description of the policy/policies you have uploaded (max. 200 words).

**1.3 Where the organisation has the following family and leave policies, do they use gender-neutral language and explicitly state that they are applicable regardless of gender? Tick all that apply.**

*Guidance:*

- *The policies should explicitly state that they apply regardless of the employee or the employee's partner's gender.*
  - *The policies should avoid gendered language and pronouns, for example, by using the term 'partner' instead of 'husband' or 'wife'.*
- Adoption Policy
  - Special or Compassionate Leave Policy
  - Maternity Policy
  - Paternity Policy
  - Shared Parental Leave Policy
  - None of the above

Upload the selected policies.

Provide a brief description of the policy/policies you have uploaded (max. 200 words).

**1.4 Does the organisation have a trans inclusion policy that covers the following? Tick all that apply.**

*Guidance:*

- *This policy should contain information about the inclusion of all trans employees, regardless of whether they are currently transitioning.*
- *C – guidance must make clear that all trans employees can use the facilities (e.g. toilets, changing rooms) they feel most comfortable using and should explain your commitment to introducing gender-neutral facilities, if not already widely available.*

- *D – guidance on dress code should be offered regardless of whether you have a uniform or dress code policy. This should make clear that all employees, including trans and non-binary employees, are encouraged to wear the uniform or dress that they feel most comfortable in. If you provide a uniform, this should include provision for gender fluid employees to have multiple uniforms.*
- A. A clear commitment to supporting all trans people, including those with non-binary identities
- B. Information on language, terminology and trans identities, including non-binary identities
- C. Guidance on facilities for trans employees, including non-binary employees
- D. Guidance on dress code for trans employees, including non-binary employees
- E. A clear commitment to confidentiality and data protection for trans staff
- F. None of the above

Upload the selected policies.

Provide a brief description of the policy/policies you have uploaded (max. 150 words).

**1.5 Does the organisation have a policy (or policies) to support employees who are transitioning that covers the following? Tick all that apply.**

*Guidance:*

- *This could be contained within a trans inclusion policy, could be supportive guidance to a trans inclusion policy, or could be in a stand-alone transitioning at work policy.*
- *This should be explicitly non-binary inclusive.*
- *A and C – these should include a commitment that the employee will be allowed the time off that they need for transition-related treatments or appointments and that any leave will be recorded separately to sick leave.*
- A. Work related guidance for an employee who is transitioning (bronze award requirement)
- B. Work related guidance on the process for an employee to change their name and gender marker on workplace systems
- C. Work related guidance around data protection and confidentiality
- D. Work related guidance for managers on how to support an employee who is transitioning (bronze award requirement)
- E. Work-related guidance for employees on how to support a colleague who is transitioning
- F. None of the above

Upload the selected policies.

Provide a brief description of the policy/policies you have uploaded (max. 200 words).

**1.6 Does the organisation have a formal commitment to introduce gender-neutral facilities in all its buildings?**

*Guidance:*

- *If gender-neutral facilities are not already available in all buildings, this should be a formal commitment to introduce gender-neutral facilities in any new builds or to gender-neutral facilities being a requirement of any new leases.*
- *Provision of gender-neutral facilities should be in addition to accessible facilities.*

Yes  
No

Provide a brief description of the organisation's current provision, its commitment to introducing gender-neutral facilities and how this has been formalised (max. 500 words).

### **1.7 Does the organisation provide its employees with private healthcare insurance?**

Yes  
No

If 'Yes': **Does the organisation's private healthcare insurance include the following? Tick all that apply.**

Guidance

- *C – this should include how you scrutinised mental health provision for LGBT inclusivity, for example by asking about LGBT-specific training for frontline practitioners.*
- *D – the policy must explicitly state that this provision applies regardless of gender.*

- A. Transition-related treatments
- B. LGBT-inclusive mental health treatments
- C. Coverage for spouse/partner and children, regardless of gender
- D. None of the above

Provide a description of the provision.

Copy and paste the relevant sections of your insurance policy.

If 'No': **In the last three years, has the organisation scrutinised its mental health support provision for LGBT inclusivity?**

Guidance:

- *Provision could include your employee assistance programme, affiliated counselling services or internal mental health first aiders.*
- *Scrutiny should include specific actions, such as asking about a provider's LGBT-specific training for frontline employees.*

Yes  
No

Describe how you scrutinised the provision and what the outcomes were. Please provide specific dates or time periods within the last three years.

**The following question is for information gathering purposes only and is not scored.**

### **1.8 Has the organisation reviewed other policies to ensure they are LGBT inclusive?**

Guidance:

- *This might include menopause or andropause policies.*

- *This might also include domestic abuse policies.*

Yes

No

Upload the selected policies.

Provide a brief description of the policy/policies you have uploaded (max. 150 words).

**The following question is for information gathering purposes only and is not scored.**

**1.9 Are the organisation's compassionate and/or special leave policies inclusive of loved ones/chosen families/close support networks and supporting someone through transition?**

*Guidance:*

- *Chosen families are people who an employee considers to be family, but who have no legal or biological connection to them.*
- *Chosen families, loved ones and close support networks can be particularly significant to those who are estranged from their families, an issue that disproportionately affects LGBT people.*
- *Policies should be clear that employees are entitled to the same leave when it relates to their loved ones/chosen family/close support networks as when it relates to their biological or legal family members.*
- *Special leave policies should explicitly include provision to support someone through transition, for example accompanying them to medical appointments.*

Yes

No

Copy and paste the relevant sections of your policies.

## **Section 2: The Employee Lifecycle**

This section examines the employee lifecycle within the organisation, starting with recruitment practices and finishing with exit processes. The questions scrutinise how the organisation engages and supports employees throughout their journey in the workplace.

**2.1 When advertising for external appointments, how does the organisation attract LGBT talent? Tick all that apply.**

*Guidance:*

- *A – this can include taking recruitment materials to Pride events and should have taken place in the last year.*
- *B – evidence should include screenshots of a job pack from the last year.*
- *C – this can be a link to a webpage.*

A. Advertising on or recruiting from LGBT or diversity websites, fairs and events

B. Include a statement around valuing diversity, explicitly inclusive of LGBT people, in all job packs and pages (bronze award requirement)

- C. Include information about your LGBT employee network group or LGBT inclusion activities in all job packs and pages
- D. None of the above

Upload evidence for the selected options.

Describe the evidence uploaded (max. 200 words).

## **2.2 Does the organisation provide guidance or training for all employees with recruitment responsibilities on how to carry out inclusive recruitment?**

*Guidance:*

- *This should be specific to recruitment and include LGBT content.*
- *This should be provided to all employees involved in recruitment, not just HR teams.*
- *Best practice would be a checklist of inclusive practices that recruiters complete when they carry out a recruitment round. This might include, for example, sharing their pronouns at the start of an interview, if they feel comfortable doing so.*

Yes

No

Upload evidence of guidance or training.

Describe the format of the guidance or training and the content you have uploaded (max. 500 words).

## **2.3 What information does the organisation supply to all new employees (external appointments) when being inducted into the organisation? Tick all that apply.**

*Guidance:*

- *Content for all options can be supplied in person, online (through a video or post), or on paper.*
- *A – the message should explicitly refer to LGBT inclusion, including bi, non-binary and trans inclusion.*
- *C – relevant policies are those covered in Section 1.*

A. Explicit message on the organisation's commitment to LGBT inclusion (bronze award requirement)

B. Information on the LGBT employee network or allies programme/initiative

C. Information on relevant policies and the organisation's commitment to ensuring they are LGBT inclusive

D. None of the above

Briefly describe the induction process and at what point the new starter receives the above information (max. 500 words).

Upload evidence for the selected options.

## **2.4 Does the organisation enable non-binary employees to have their identities recognised on all employee-facing workplace systems?**

*Guidance:*

- Examples include the option to choose a gender marker other than male or female and being able to use gender-neutral titles, such as Mx.
- Alternatively, you could consider removing gender markers and titles from your systems altogether.
- You should include at least one example specific to gender fluid people, for example the ability to have multiple passcards with different forms of gender expression.

Yes

No

Describe how non-binary identities are recognised on workplace systems, including at least two examples (max. 500 words).

## 2.5 Does the organisation provide all-employee training on compliance with its discrimination, bullying and harassment policies, including the following:

Guidance:

- The training should reach as many employees as possible across your organisation.
- Training content should explicitly mention LGBT people and cover lesbian, gay, bi and trans in the context of each option selected.
- Examples of content you could upload are case studies, e-learning screenshots or PowerPoint presentations.

Employee completion rate

	76– 100%	51– 75%	26– 50%	1– 25%	None
A. Organisational policy and legislation (bronze award requirement)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Examples of biphobic, homophobic and transphobic discrimination, bullying and harassment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Examples of discrimination, bullying and harassment on the basis of multiple identities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. How to challenge biphobic, homophobic and transphobic discrimination, bullying and harassment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. How to report biphobic, homophobic and transphobic discrimination, bullying and harassment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
F. A clear route for feeding back on the inclusion or representation of employees' identities in the training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Describe how you estimate completion rates (max. 500 words).

Describe the format of the training and the content you have uploaded (max. 500 words).

Upload evidence for selected options.

**2.6 In the past year, which of the following messages have appeared in internal communications to all employees? Tick all that apply.**

**Guidance:**

- *Communications uploaded should have been sent or made available to all employees (or as many as geographically possible through the specific communication method). In your uploaded evidence, make clear who/how many employees the communication reached.*
- *Evidence could include emails and screenshots of intranet posts.*
- *A – communications can focus on specific awareness days/events, such as LGBT History Month, Pride and/or IDAHOBIT (International Day Against Homophobia, Biphobia and Transphobia).*
- *B – communications can focus on specific awareness days/events, such as Bi Visibility Day and/or Pan Visibility Day.*
- *C – communications can focus on specific awareness days/events, such as Trans Day of Visibility, Trans Day of Remembrance and/or Trans Pride.*
- *D – communications can focus on specific awareness days/events, such as Non-Binary People's Day.*
- *A, B, C and D – you are required to meet at least one of these criteria to receive a bronze award.*

- A. Information about LGBT identities and experiences (bronze award requirement)
- B. Information about bi identities and experiences (bronze award requirement)
- C. Information about trans identities and experiences (bronze award requirement)
- D. Information about non-binary identities and experiences (bronze award requirement)
- E. Information about the LGBT Employee Network Group and/or allies activity
- F. Information about LGBT-inclusive policies
- G. Information about the importance of pronouns and pronoun introductions
- H. None of the above

Upload evidence for selected options.

Provide date for option A:

Provide date for option B:

Provide date for option C:

Provide date for option D:

Provide date for option E:

Provide date for option F:

Provide date for option G:

**2.7 Does the organisation proactively recognise contributions to LGBT inclusion activity during employee performance appraisals?**

**Guidance:**

- *The onus should be on the employer/manager to make clear that contributions to LGBT inclusion (such as network group activity) align with organisational values and count towards diversity and inclusion objectives.*



- *This should be systematic and applied to all performance appraisals, not just those of the network leads.*
- *Recognition doesn't have to be financial.*

Yes

No

Describe how contributions are recognised (max. 300 words).

## **2.8 Does the organisation identify and act on any LGBT inclusion issues raised at exit interviews or on exit surveys?**

*Guidance:*

- *This can be part of a wider question about diversity and inclusion at the organisation.*
- *Answers should detail how all employees are given opportunities to raise any issues relating to discrimination (homophobia, biphobia and/or transphobia) they may have experienced or become aware of in the organisation.*
- *There should be a clear process by which issues are referred and acted on by the organisation.*

Yes

No

Describe the exit interview/survey process and how LGBT issues would be identified or raised (max. 200 words).

Describe how any issues raised would be acted upon by the organisation (max. 200 words).

**The following question is for information gathering purposes only and is not scored.**

## **Does the organisation have a mental health or wellbeing strategy that explicitly addresses the needs of LGBT people?**

*Guidance:*

- *This should address the specific needs of lesbian, gay, bi and trans people.*

Yes

No

Upload your mental health or wellbeing strategy.

Describe how this was developed and any actions that have come from it (max. 500 words).

**The following question is for information gathering purposes only and is not scored. It will only be asked if your organisation provides apprenticeships.**

## **When advertising for its apprenticeships, does the organisation run initiatives to specifically attract LGBT job seekers?**

*Guidance:*

- *This might include LGBT-specific content in recruitment materials or advertising at LGBT-specific events.*

Yes

No

Describe the initiatives (max. 500 words)

### Section 3: LGBT Employee Network Group

This section examines the work of your LGBT employee network group. The questions scrutinise the support the group is given by the organisation, its commitment to inclusivity, and the activities it carries out.

**3.1 Does the organisation have an LGBT employee network group for LGBT employees? Select one option.**

*Guidance:*

- *A – this option scores maximum marks for this question.*
- *B and C – these options score lower marks for this question.*
- *A, B and C – you are required to meet one of these criteria to receive a bronze award.*

- A. Yes, with a defined role and terms of reference (bronze award requirement)
- B. No, but we have a Diversity & Inclusion group with formal LGBT representation (bronze award requirement)
- C. No, but we have a formal agreement with an external network in our sector/region (bronze award requirement)
- D. None of the above

Option A and B: Upload the group's terms of reference.

Option C: Describe the formal agreement and your organisation's role in the network (max. 500 words).

**3.2 In the past year, has the organisation supported the work of the LGBT employee network group in the following ways? Tick all that apply.**

*Guidance:*

- *C – time should be formally agreed.*
  - *D – this should develop practical skills relevant to the role of the network group, for example peer support, mentoring or conflict resolution.*
  - *E – these can be general or LGBT-specific programmes and should be communicated to members through the employee network group.*
- A. Provided a network group budget
  - B. Provided a formal senior champion
  - C. Allowed time for committee members to carry out network group activity
  - D. Facilitated network members' participation in skills training

- E. Facilitated network members' participation in leadership or professional development programmes
- F. Facilitated network members' participation in LGBT-specific seminars and conferences
- G. None of the above

Describe the support provided and how it is communicated to the network (max. 200 words per option).

**3.3 In the past year, which of the following activities has the LGBT employee network group undertaken to improve its inclusivity? Tick all that apply.**

*Guidance:*

- *C – this should reference specific marginalised or underrepresented groups (for example, trans people or LGBT people of colour).*
  - *D – this could be a physical or digital space, for example a meet-up for LGBT people of faith or a closed bi digital group on your intranet.*
- A. Implemented a formal mechanism to ensure bi issues are engaged with (for example, bi reps)
  - B. Implemented a formal mechanism to ensure trans issues are engaged with (for example, trans reps)
  - C. Promoted itself as being open to all and inclusive of marginalised and underrepresented LGBT groups
  - D. Introduced specific spaces for marginalised and underrepresented LGBT groups
  - E. None of the above

Describe the activities you have undertaken (max. 200 words per option).

**3.4 Does the LGBT employee network group have a formal strategy to ensure it is inclusive of and accessible to marginalised or underrepresented LGBT groups?**

*Guidance:*

- *Your strategy should focus on the inclusion of at least three specific marginalised or underrepresented LGBT groups. This might include (but is not limited to):*
  - *BAME LGBT people / LGBT People of Colour*
  - *Bi people*
  - *LGBT carers*
  - *LGBT people of faith*
  - *LGBT parents*
  - *LGBT people with accessibility needs*
  - *Non-binary people*
  - *Older LGBT people*
  - *Trans people*
- *Your description should include how you identified which marginalised or underrepresented groups to focus your strategy on. This might include insights from:*
  - *LGBT network group membership and event attendance*
  - *LGBT network group satisfaction surveys*
  - *Employee satisfaction surveys*
  - *WEI Staff Feedback Questionnaire report*
  - *Sectoral, regional or national research*

- *Your description should include actions the network group has taken so far and has committed to take in the future. These might include (but are not limited to):*
  - *Introducing an inclusion rep*
  - *Holding events within working hours*
  - *Holding regular alcohol-free social events*
  - *Holding events at accessible venues*
  - *Avoiding holding events at the same time as religious festivals/holy days*
- *Actions must be in addition to those referenced in 3.3*

Yes

No

Upload your strategy document.

Describe how the strategy was formulated, actions the network has taken so far and outcomes so far (max. 500 words).

**3.5 Which of the following support activities does the LGBT employee network group undertake? Tick all that apply.**

*Guidance:*

- *Support for individuals should be available and advertised to all staff.*
  - *Consultation on internal policies and practices should be considered as policies that impact upon employee welfare (for example, reviewing an updated adoption policy).*
  - *A – this could be on an individual basis and/or through a closed digital group for LGBT employees.*
- A. Provide confidential support to all employees on LGBT issues  
 B. Provide support to enable employees to report homophobic, biphobic and transphobic bullying and harassment  
 C. Consultation on improving internal policies and practices  
 D. None of the above

Describe the options selected (max. 200 words per option).

**3.6 In the past year, which of the following activities has the LGBT employee network group undertaken? Tick all that apply.**

*Guidance:*

- *If not carried out by the LGBT employee network group, these activities can be carried out by other parts of the organisation (for example, the diversity and inclusion team). However, this must at least be in consultation with the network group.*
  - *'Awareness raising events' refers to activities that serve to educate or inform the wider organisation, for example panel discussions, lunch and learns, or stalls during diversity events.*
  - *G – this could either be a specific programme run by the network or alternatively an organisation-wide programme that proactively incorporates LGBT mentoring.*
- A. Social networking event for members  
 B. LGBT equality awareness-raising event  
 C. Bi equality awareness-raising event

- D. Non-binary equality awareness-raising event
- E. Trans equality awareness-raising event
- F. Collaborated with other LGBT network groups
- G. Mentoring or coaching programme
- H. None of the above

Describe the activities selected and when they occurred (max. 200 words per option). Please provide specific dates or time periods within the last year.

**3.7 In the past year, has the LGBT network group held campaigns, initiatives, seminars or events engaging with the intersection of LGBT and other diversity strands? Select one option.**

*Guidance*

- *You will be awarded for up to three examples from the last year. These should each look at the experiences of specific marginalised or underrepresented groups, which could include (but is not limited to):*
    - *BAME LGBT people / LGBT People of Colour*
    - *LGBT parents or families*
    - *LGBT people with accessibility needs, for example including LGBT disabled people and LGBT neurodivergent people*
    - *LGBT people with experience of mental ill health*
    - *LGBT people with experience of poverty or homelessness*
    - *LGBT people of faith*
    - *LGBT women*
    - *Older LGBT people*
  - *You should explain why you chose to focus on the experiences of these groups. For example, this might be because of a gap in your previous work.*
  - *(From the 2023 Workplace Equality Index) At least two of the groups should be different to your organisation's previous submission.*
  - *These activities can be carried out in collaboration with other employee network groups.*
  - *If not carried out by the LGBT employee network group, these activities can be led by other parts of the organisation (for example, the faith employee network group might run an event on being an LGBT person of faith).*
  - *'Initiatives' and 'campaigns' here refer to specific programmes or projects, for example a series of events, videos or blogs.*
- A. Yes, three examples
  - B. Yes, two examples
  - C. Yes, one example
  - D. No

Describe the campaigns, initiatives, seminars or events and when they occurred (max. 500 words).

Please provide specific dates or time periods within the last year.

**3.8 Does the LGBT employee network group have measures in place to ensure that activity reaches employees in all locations?**

*Guidance:*

- *This should be formalised, consistent work to ensure activity can reach all employees. This might include a commitment in your terms of reference to hold a percentage of your events online or run activities in different regions.*
- *You should consider dispersed workforces (for example those in retail stores or without regular access to IT), employees who work from home, and employees across all UK nations that you operate in.*
- *If you only have one location or building, you should consider the needs of employees who work remotely or away from desks.*
- *You should provide at least two examples of measures you have in place.*

Yes  
No

Describe at least two measures in place and how they are formalized (max. 500 words).

## Section 4: Empowering Individuals

This section examines the process of engaging individuals to create an LGBT inclusive culture at the organisation. The questions scrutinise how the organisation empowers LGBT and non-LGBT employees to step up as change makers and allies.

### 4.1 Does the organisation support LGBT employees at all levels to become change makers through training, programmes and/or resources?

*Guidance:*

- *Examples of support can include resources, programmes or training.*
- *The support must focus specifically on steps LGBT people can take to become active role models or change makers in your organisation.*

Yes  
No

Describe the training, programmes and/or resources (max. 500 words).

### 4.2 In the past year, has the organisation shared the workplace experiences of LGBT people with the following identities? Tick all that apply.

*Guidance:*

- *This should be an internal communication, such as an all-employee email or blog post.*
- *Within the content, the person's identity must be clear. It should not be left up to the reader or viewer to make assumptions.*
- *Stonewall uses umbrella terms and we recognise that language and identities are personal. If an employee uses a term that isn't listed below, you should be led by them on which (if any) option they feel comfortable being included within.*
- *Best practice is to share the experiences of internal employees. However, you should take care to ensure that no pressure is put on LGBT employees to be visible in this way. If employees do not want to share their experiences, you can share the workplace experiences of employees outside your organisation, for example from the wider sector.*

- *Marks will not be awarded in this question where the experiences of celebrities are shared.*
- A. BAME LGBT people / LGBT People of Colour
  - B. Bi people
  - C. Binary trans people (e.g. trans men and trans women)
  - D. Gay or lesbian people
  - E. LGBT people aged 25 or younger.
  - F. LGBT people aged 50 or older.
  - G. LGBT people at board level
  - H. LGBT people at senior management level
  - I. LGBT people being open about their mental health challenges (including disability relating to mental health)
  - J. LGBT people of faith
  - K. LGBT people who are parents
  - L. LGBT people with accessibility needs (excluding accessibility needs relating to mental health)
  - M. Non-binary people (e.g. genderfluid or genderqueer people)
  - N. None of the above

For each option selected: submit evidence of sharing these experiences in the last year.

For each option selected: provide the date on which this was shared internally.

**4.3 Does the organisation have a formal programme or initiative to engage all non-LGBT employees to become LGBT allies? Select one option.**

*Guidance*

- *The programme should be a formal mechanism to engage non-LGBT people with LGBT equality.*
- *This can include allies receiving a visible signal of their commitment to LGBT equality, but this must be conditional on employees participating in a programme and/or receiving training.*
- *The programme should include internal awareness-raising sessions or training specifically for allies. This should cover the importance of allies and actions that individuals can take to be effective allies.*
- *To be awarded marks, this programme must be more in-depth than a one-off internal communication or event (as awarded for in sections 2 and 3).*

- A. Yes, as part of our LGBT employee network group
- B. Yes, a separate allies network group
- C. Yes, through another initiative
- D. No

Describe the allies programme or initiative (max. 500 words).

Upload a communication advertising the allies programme or initiative.

**4.4 Does the organisation support all non-bi employees (including lesbian and gay employees) to become bi allies through training, programmes and/or resources?**

*Guidance:*

- *Examples can include information booklets, programmes or training.*

- *This must focus specifically on being an ally to bi people and include specific actions employees can take.*
- *This should be more in-depth than a one-off internal communication (as awarded for in sections 2 and 3).*

Yes

No

Describe the training, programmes and/or resources (max. 500 words).

Upload any written content, such as training slides or resources.

**4.5 Does the organisation support all cis employees (including lesbian, gay and bi employees) to become trans allies through training, programmes and/or resources?**

*Guidance:*

- *Examples can include information booklets, programmes or training.*
- *This must focus specifically on being an ally to trans people and include specific actions employees can take.*
- *This must include specific content on being an ally to non-binary people.*
- *This should be more in-depth than a one-off internal communication or event (as awarded for in sections 2 and 3).*

Yes

No

Describe the training, programmes and/or resources (max. 500 words).

Upload any written content, such as training slides or resources.

**4.6 Does the organisation support all employees (including LGBT employees) to become allies to other marginalised LGBT communities through training, programmes and/or resources?**

*Guidance:*

- *This should focus on identities other than bi or trans identities. For example, the support could focus on becoming an ally to groups experience multiple marginalisation, such as LGBT people of faith.*
- *This should be more in-depth than a one-off internal communication or event (as awarded for in sections 2 and 3).*
- *This should include specific actions employees can take.*

Yes

No

Describe the training, programmes and/or resources (max. 500 words).

Upload any written content, such as training slides or resources.



#### 4.7 Does the organisation have measures in place to ensure that your work to empower individuals reaches employees in all locations?

*Guidance:*

- *This should be consistent work to ensure activity can reach all employees.*
- *This might include:*
  - *Ensuring you share the stories of LGBT people from all the regions or UK nations you operate in.*
  - *Ensuring your allies programmes and resources are available in all your locations and/or digitally.*
- *You should consider dispersed workforces (for example those in retail stores or without regular access to IT), employees who work from home, employees in urban/rural settings, and employees across all UK nations that you operate in.*
- *If you only have one location or building, you should consider the needs of employees who work remotely or away from desks.*
- *You should provide at least two examples of measures you have in place.*

Yes

No

Describe at least two measures in place and how they are formalised (max. 500 words).

### Section 5: Leadership

This section examines how the organisation engages senior leaders and line managers in their responsibility to set an LGBT-inclusive culture. The questions scrutinise how the organisation empowers senior leaders, the individual actions senior leaders take, and how all line managers are encouraged to recognise LGBT inclusion as key to their role.

#### 5.1 How does the organisation support board and senior management employees to understand the issues that affect LGBT people? Tick all that apply.

*Guidance:*

- *The support should be consistently provided, not on an ad hoc basis.*
- *Each option should be available to multiple senior leaders, not just one senior champion.*
- *A – this is a formal process whereby senior employees are mentored on LGBT issues by more junior LGBT employees.*

- A. Reverse mentoring opportunities
- B. Mentoring or coaching opportunities with other senior leaders
- C. LGBT-specific conferences and seminars
- D. Bi-specific conferences and seminars
- E. Non-binary specific conferences and seminars
- F. Trans-specific conferences and seminars
- G. None of the above

Describe each option selected (max. 200 words per option)

**5.2 In the past year, which of the following activities have members of the board and/or senior management engaged in? Tick all that apply.**

*Guidance:*

- *These activities should be carried out by a range of leaders.*
- *E – this will only be awarded if you received points for questions 6.4, 6.5 or 6.6.*
- *F – this should be periodic, not ad hoc.*
- *G and H – your description should include how the speech had specific messages of bi, non-binary and trans equality.*
- *H – this can be a sector-facing or community-facing event.*

- A. Communicated a strong message on LGBT equality
- B. Communicated a strong message on bi equality
- C. Communicated a strong message on trans equality, explicitly including non-binary equality
- D. Reviewed and/or approved an LGBT inclusion strategy
- E. Reviewed top line LGBT monitoring reports and actions
- F. Met periodically with the LGBT employee network group
- G. Spoken at an internal LGBT event
- H. Spoken at an external LGBT event
- I. Attended an external LGBT event, for example Pride
- J. None of the above

Describe each option selected (max. 200 words per option). Please include specific dates or time periods.

Please list the names and job titles of the individuals named above. Please ensure you have strict permission from them for their name to appear in this submission.

**5.3 Does the organisation have measures in place to ensure that senior leader activity reaches employees in all locations?**

*Guidance:*

- *This should be consistent work to ensure activity can reach all employees.*
- *This might include:*
  - *Ensuring activities are carried out by senior leaders in all regions or UK nations that you operate in.*
  - *Ensuring that speeches at internal LGBT events are recorded and distributed digitally.*
  - *Ensuring that senior leader messages are written as well as verbal.*
- *You should consider dispersed workforces (for example those in retail stores or without regular access to IT), employees who work from home, and employees across all UK nations that you operate in.*
- *If you only have one location or building, you should consider the needs of employees who work remotely or away from desks.*
- *You should provide at least two examples of measures you have in place.*

Yes  
No

Describe at least two measures in place and how they are formalised (max. 500 words).

#### **5.4 Does the organisation require all senior leaders and line managers to meet an inclusion-based competency on recruitment?**

*Guidance:*

- *This should be a standard competency in all job descriptions and/or a mandatory question in all interviews.*
- *This does not need to just be one standard question – you can provide a range of competencies and/or interview questions for the recruiting team to choose from.*
- *This should include internal promotions as well as external appointments.*
- *This does not need to be LGBT specific.*

Yes

No

Copy and paste the standard competency or interview question wording.

Describe how inclusion-based competencies are implemented across all roles (max. 200 words).

#### **5.5 Does the organisation require all senior leaders and line managers to have an inclusion-based objective?**

*Guidance:*

- *This should be a standard practice across all performance appraisal structures and documents.*
- *You do not need to provide template wording, but best practice is to provide a range of objectives senior leaders and line managers might consider based on their roles.*
- *This does not need to be LGBT specific.*

Yes

No

Describe how inclusion-based objectives are implemented across all roles (max. 500 words).

### **Section 6: Monitoring**

This section examines how the organisation uses monitoring to understand the representation and experiences of its LGBT employees. The questions scrutinise data collection methods, analysis and outcomes.

**Please ensure that no personally identifiable information is contained in your answers or evidence.**

#### **6.1 Does the organisation gather data on employee sexual orientation through diversity monitoring forms and/or systems?**

*Guidance:*

- *The question wording should be in line with latest good practice. Please speak to your account manager if you are unsure of this.*
- *You should use the same good practice question wording across all the touchpoints where it collects this data. Please state in your description if different question wording is used elsewhere.*

Yes

No

Copy and paste the question you ask and the options employees can select (max. 500 words).

**If yes, what proportion of employees have answered this question on your HR system?**

*Guidance:*

- *This should be from an HR system, not an anonymous staff survey.*
- *The proportion should not include those who prefer not to say.*

90-100%

80-89%

70-79%

60-69%

50-59%

Under 50%

We do not monitor

Upload an analysis report demonstrating the declaration rate. Note that this must not contain individual responses or personally identifiable data.

Provide a brief description of the report you have uploaded (max. 200 words).

**6.2 Does the organisation gather data on employee gender, inclusive of non-binary identities, through diversity monitoring forms and/or systems?**

*Guidance:*

- *The question wording should be in line with latest good practice. Please speak to your account manager if you are unsure of this.*
- *You should use the same good practice question wording across all the touchpoints where it collects this data. Please state in your description if different question wording is used elsewhere.*

Yes

No

Copy and paste the question you ask and the options employees can select (max. 500 words).

**If yes, what proportion of employees have answered this question on your HR system?**

*Guidance:*

- *This should be from an HR system, not an anonymous staff survey.*
- *The proportion should not include those who prefer not to say.*

90-100%  
80-89%  
70-79%  
60-69%  
50-59%  
Under 50%  
We do not monitor

Upload an analysis report demonstrating the declaration rate. Note that this must not contain individual responses or personally identifiable data.

Provide a brief description of the report you have uploaded (max. 200 words).

### **6.3 Does the organisation gather data on employee trans status through diversity monitoring forms and/or systems?**

*Guidance:*

- *The question wording should be in line with latest good practice. Please speak to your account manager if you are unsure of this.*
- *You should use the same good practice question wording across all the touchpoints where it collects this data. Please state in your description if different question wording is used elsewhere.*

Yes  
No

Copy and paste the question you ask and the options employees can select (max. 500 words).

### **If yes, what proportion of employees have answered this question on your HR system?**

*Guidance:*

- *This should be from an HR system, not an anonymous staff survey.*
- *The proportion should not include those who prefer not to say.*

90-100%  
80-89%  
70-79%  
60-69%  
50-59%  
Under 50%  
We do not monitor

Upload an analysis report demonstrating the declaration rate. Note that this must not contain individual responses.

Provide a brief description of the report you have uploaded (max. 200 words).

### **6.4 Does the organisation monitor and analyse success rates from application to appointment across the following characteristics? Tick all that apply.**

*Guidance:*

- *This refers to external appointments to the organisation.*
- *You should compare applicant diversity forms to new starter diversity forms.*
- *Analysis should have taken place in the past two years.*
- *A – note that you will only be eligible for marks if you have been awarded marks in 6.1.*
- *B – note that you will only be eligible for marks if you have been awarded marks in 6.2.*
- *C – note that you will only be eligible for marks if you have been awarded marks in 6.3.*

- A. Sexual orientation
- B. Gender
- C. Trans status
- D. None of the above

A – upload the most recent report showing analysis by sexual orientation.

B – upload the most recent report showing analysis by gender.

C – upload the most recent report showing analysis by trans status.

Note that these must not contain individual responses or personally identifiable data.

Describe who the analysis was seen by and what action taken (max. 500 words).

**6.5 Does the organisation monitor and analyse the number of employees at different pay grades across the following characteristics? Tick all that apply.**

*Guidance:*

- *This can be analysis looking at pay grades, pay rates and/or seniority levels.*
- *The data should be collected through your HR system, rather than an anonymous staff survey.*
- *Analysis should have taken place in the past two years.*
- *A – note that you will only be eligible for marks if you have been awarded marks in 6.1.*
- *B – note that you will only be eligible for marks if you have been awarded marks in 6.2.*
- *C – note that you will only be eligible for marks if you have been awarded marks in 6.3.*

- A. Sexual orientation
- B. Gender
- C. Trans status
- D. None of the above

A – upload the most recent report showing analysis by sexual orientation.

B – upload the most recent report showing analysis by gender.

C – upload the most recent report showing analysis by trans status.

Note that these must not contain individual responses or personally identifiable data.

Describe who the analysis was seen by and what action taken (max. 500 words).

**6.6 When running staff satisfaction surveys, does the organisation break down and analyse the satisfaction of employees by the following characteristics? Tick all that apply.**

*Guidance:*

- *This can be done by collecting diversity data on a staff satisfaction survey.*
- *Data collection and analysis should have taken place in the past two years.*
- *A – note that you will only be eligible for marks if you have been awarded marks in 6.1.*
- *B – note that you will only be eligible for marks if you have been awarded marks in 6.2.*
- *C – note that you will only be eligible for marks if you have been awarded marks in 6.3.*

- A. Sexual orientation
- B. Gender
- C. Trans status
- D. None of the above

A – upload the most recent report showing analysis by sexual orientation.

B – upload the most recent report showing analysis by gender.

C – upload the most recent report showing analysis by trans status.

Note that these must not contain individual responses or personally identifiable data.

Describe who the analysis was seen by and what action taken (max. 500 words).

**6.7 Which of the following activities has the organisation carried out in the last year to improve confidence in LGBT monitoring and boost declaration rates? Tick all that apply.**

*Guidance:*

- *A, B and C – communications must be available to all employees, not just your LGBT employee network group.*
- *D and E – definitions can be included within the questions themselves, with a link to a glossary, or within communications promoting the monitoring exercise.*
- *Evidence could include screenshots of the relevant communications or monitoring questions.*

- A. Communicated why LGBT monitoring matters
- B. Provided information about confidentiality and data security
- C. Communicated how previous monitoring exercises have led to improvements
- D. Provided a definition of 'bi' that is explicitly inclusive of pan and queer identities
- E. Provided a definition of 'trans' that is explicitly inclusive of non-binary identities
- F. None of the above

Upload evidence for each option.

Provide a brief description of the communication and how it was shared with employees (max. 200 words). Please include specific dates or time periods.

**The following question is for information gathering purposes only and is not scored. It will only be asked if your organisation provides apprenticeships.**

**6.8 For apprenticeships, does the organisation monitor and analyse success rates from application to appointment across the following characteristics? Tick all that apply.**

*Guidance:*

- *You should compare applicant diversity forms to new starter diversity forms.*
- *Analysis should have taken place in the past two years.*
- *A – note that you will only be eligible for marks if you have been awarded marks in 6.1.*
- *B – note that you will only be eligible for marks if you have been awarded marks in 6.2.*
- *C – note that you will only be eligible for marks if you have been awarded marks in 6.3.*

- A. Sexual Orientation
- B. Gender
- C. Trans status
- D. None of the above

A – upload the most recent report showing analysis by sexual orientation.

B – upload the most recent report showing analysis by gender.

C – upload the most recent report showing analysis by trans status.

Note that these must not contain individual data.

Describe who the analysis was seen by and what action taken (max. 500 words).

## Section 7: Supply chains

This section examines how the organisation affects change in its supply chain. The questions scrutinise the steps taken to ensure suppliers are LGBT-inclusive, from tendering new suppliers to monitoring current contracts.

### 7.1 Before awarding a contract, does the organisation scrutinise the following in the tender process? Tick all that apply.

*Guidance:*

- *The description should include how the procurement team is trained to scrutinise each of these areas.*
- A. Whether the potential supplier has a policy that explicitly bans discrimination, bullying and harassment based on sexual orientation and gender identity
- B. Whether the potential supplier monitors incidents of bullying and harassment based on sexual orientation and gender identity
- C. Whether the supplier has a transitioning at work policy
- D. Whether the potential supplier has a diversity and inclusion strategy
- E. None of the above

Describe the selected options below (max. 500 words per option).

Describe how teams with procurement responsibilities are trained on these requirements (max. 200 words).

### 7.2 When a potential supplier does not meet LGBT inclusion scrutiny, how does the organisation respond? Select one option.

*Guidance:*



- *Options A and B are worth an equal number of points.*
- *A and B – there should be clear and consistent criteria for when either of these steps will be taken.*

- A. By not awarding the contract
- B. By requiring improvements as a condition of contract
- C. None of the above

Describe how this decision is reached (max. 500 words).

Option B only: describe how the requirement is enforced (max. 500 words).

**7.3 Once a contract is awarded, how does the organisation hold the supplier to account? Tick all that apply.**

*Guidance:*

- *A – this does not have to be specifically for LGBT related issues but should be inclusive of them.*
- *B – this might be internal or external, depending on the nature of the supplier. For example, if they employ your frontline staff, this should involve monitoring service user feedback and complaints.*

- A. Include a broad diversity and inclusion slot in contract monitoring meetings, inclusive of LGBT issues
- B. Monitor and analyse LGBT-related feedback on supplier
- C. None of the above

Describe the selected options below (max. 500 words per option).

**7.4 In the past year, how has the organisation engaged or collaborated with its suppliers? Tick all that apply.**

*Guidance:*

- *A – this can developing and running training together, or sharing your existing training with the supplier.*
- *B – for major contracts, this could include inviting procured staff to join your LGBT employee network group.*
- *C – this should be specific advice that you have given, for example a consultancy session with your Diversity & Inclusion team on setting up an LGBT employee network group. This could also include period roundtables with your major suppliers on specific topics.*

- A. Held joint LGBT diversity and inclusion training
- B. Invited suppliers' employees to take part in LGBT employee network group events
- C. Advised on LGBT inclusion initiatives
- D. None of the above

Describe the selected options below (max. 500 words per option). Please include specific dates or time periods.

## **Section 8: External Engagement and Service Delivery**

This section comprises of three parts. Part 1 (Community Engagement) examines the outreach activity of the organisation and how it supports wider LGBT communities. Part 2 (Sector Engagement) examines how the organisation promotes LGBT equality to other organisations in its sector. Part 3 (Service Delivery) examines how the organisation ensures it meets the needs of its service users or customers.

Please choose the option that describes your organisation:

Option 1: Organisation with individual service users, customers, members, or audience members.

**You will complete all questions from 8.1 to 8.12.**

Option 2: Organisation without individual service users, customers, members or audience members.

**You will only complete questions 8.1 to 8.4. Note that scores available will be weighted to equal option 1.**

## Part 1: Community Engagement

**8.1 In the past year, has the organisation supported LGBT community groups in the following ways? Tick all that apply.**

*Guidance:*

- *An LGBT community group could include LGBT Pride organisations, LGBT equality charities, LGBT youth groups or grassroots LGBT networks.*
- *Your support can be in collaboration with other employers in your sector or region, but you must evidence the role of your organisation.*
- *Your support can be led by any part of your organisation, including your LGBT employee network group.*
- *For B, C and D, you can evidence supporting a specific initiative within a wider LGBT group (for example, for B, funding a bi-specific strand of an LGBT Pride event).*
- *D – this should be a group or initiative engaging with LGBT communities that experience multiple forms of marginalisation, for example LGBT people of colour, LGBT disabled people or older LGBT people.*
- *More marks are awarded for higher grades of work. You will be given marks for the highest awarded grade for each sub-question (A, B, C, D), but you should provide evidence for all applicable grades.*

	A. LGBT group or initiative	B. Bi-specific group or initiative	C. Trans-specific group or initiative	D. Intersectional group or initiative
Grade 1: One-off financial/in-kind support  <i>E.g. Providing space for a group's event</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Grade 2: Support for one year or support of one kind for more than a year  <i>E.g. Funding a local Pride's series of events throughout a year, or providing a space for a group's meetings for multiple years</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Grade 3: Partnership of a year or more with multiple forms of support, supporting a group's long-term sustainability  <i>E.g. Supporting a group's programme of activity for three years, including sponsorship, skill sharing and providing event space</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
None of the above	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Describe each option selected (max. 500 words per option). Please include specific dates or time periods.

**8.2 In the past year, has the organisation utilised its social media accounts and online presence to demonstrate support of the following? Tick all that apply.**

*Guidance:*

- This question examines how you demonstrate to the largest possible audience that your organisation is committed to LGBT equality. The social media accounts here should be the ones with the widest reach.*
- This can be the LGBT employee network group being re-posted by an account with bigger reach.*

- A. LGBT equality
- B. Bi equality
- C. Non-binary equality
- D. Trans equality

For each selected option: upload screenshots of social media activity.

For each selected option: provide the date of this activity.

**8.3 In the past year, has the organisation supported LGBT equality campaigns?**

*Guidance:*

- This must be an external equality campaign and your support must reach beyond social media and internal awareness-raising activities.*

- *Examples might include promoting an anti-HBT (homophobic, biphobic and transphobic) bullying campaign or taking part in the Rainbow Laces campaign.*

Yes

No

Describe how the organisation has support LGBT equality campaigns (max. 500 words). Please include specific dates or time periods.

## **Part 2: Sector Engagement**

### **8.4 In the past year, has the organisation promoted LGBT equality in its sector?**

*Guidance:*

- *This can include co-organising sector network activity, as well as other Diversity and Inclusion initiatives and events.*

Yes

No

Describe how the organisation has promoted LGBT equality in its sector (max. 500 words). Please include specific dates or time periods.

## **Part 3: Service Delivery**

### **8.5 In the past year, has the organisation examined service user or customer journeys to ensure there are no barriers to LGBT people accessing products or services?**

*Guidance:*

- *This should be a formal mapping process of the touch points between the service user/customer and the service/product.*
- *This should look at a different service user or customer journey to previous submissions within this or the last cycle, for example examining a different area of the business.*

Yes

No

Describe the process by which you examined the customer journey (max. 500 words). Please include specific dates or time periods.

Describe the outcome and impact (max. 500 words). Please include specific dates or time periods.

### **8.6 Does the organisation collect LGBT monitoring information on service users or customers for the following analysis? Tick all that apply.**

*Guidance:*

- *You should demonstrate how you collect the data and how it is analysed.*
- *This should break down the experiences of service users and customers by sexual orientation, gender and trans status.*

- A. Assessing whether LGBT people are accessing your services
- B. Assessing the satisfaction of your LGBT service users in comparison to other groups
- C. None of the above

Copy and paste the questions you ask and the options service users/customers can select (max. 500 words).

Describe the process of collecting and analysing the data (max. 500 words).

Upload an analysis report from last three years.

### **8.7 Does the organisation systematically monitor LGBT-related complaints made by service users or customers?**

*Guidance:*

- *You should demonstrate how the complaints process is communicated, how you collect the data and how it is analysed.*

Yes

No

Describe the process (max. 500 words).

Upload an analysis report from the last year.

### **8.8 Does the organisation enable non-binary service users or customers to have their identities recognised on all systems?**

*Guidance:*

- *This might include providing gender options other than male and female and providing gender-neutral title options, such as Mx.*
- *You will only receive a mark for gender-neutral title options if you collect no other gender marker data.*

Yes

No

Describe how non-binary identities are recognised on systems (max. 500 words).

### **8.9 Has the organisation consulted with LGBT service users or customers in the past year to tailor services or products to their needs?**

*Guidance:*

- *The consultation should have involved lesbian, gay, bi and trans (including non-binary) service users or customers.*

Yes

No

Describe the consultation process (max. 500 words). Please include specific dates or time periods.

Describe the outcome and how services were tailored to the needs of LGBT people (max. 500 words). Please include specific dates or time periods.

**8.10 What percentage of frontline employees have been trained on the needs of LGBT service users or customers? Select the completion rate for the training.**

*Guidance:*

- *The training should reach as many frontline employees as possible and be specific to the services they are providing.*
- *Content should also include the steps frontline employees can take to eliminate discrimination and ensure LGBT service user and customer needs are met.*
- *Content should explicitly cover lesbian, gay, bi and trans (including non-binary) identities.*
- *Examples of content you could upload are case studies, e-learning screenshots or PowerPoint presentations.*

- A. 76 - 100 per cent
- B. 51 - 75 per cent
- C. 26 - 50 per cent
- D. 1 - 25 per cent
- E. No training completed

Describe how you estimate completion rates (max. 500 words).

Describe the format of the training and the content you have uploaded (max. 500 words).

Upload training content.

**8.11 Does the organisation have a public-facing policy that bans biphobic, homophobic and transphobic discrimination in its services?**

*Guidance:*

- *The policy should clearly state that you will not tolerate discrimination, bullying or harassment on the grounds of sexual orientation or gender identity and/or trans identity. These may be listed along with other protected characteristics.*
- *The policy should cover incidents towards service users from employees, towards employees from service users, and between service users.*
- *The policy should include clear information about how to report an incident and how complaints are handled.*
- *The policy does not need to be published as a formal document and could, for example, be displayed on your website.*

Yes

No

Upload the policy or relevant screenshots.

Describe where this policy is published and how it is made available to service users (max. 500 words).

**8.12 In the past year, has the organisation communicated or promoted its services or products as being explicitly LGBT inclusive?**

*Guidance:*

- *The communication can be digital or physical.*

Yes

No

Describe the reach of the communication (max. 500 words). Please include specific dates or time periods.

Upload an example communication.