The Simple Guide to Inclusive Monitoring

All publically funded organisations have a legal duty to protect and promote across the nine equality characteristics/strands in the Equality Act (2010). These are: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion/belief, sex and sexual orientation.

All nine are all equally protected under the law. There is a legal duty to know if and how publically-funded bodies meet the needs of people in relation to the nine equality strands. Organisations cannot achieve this in relation to gender reassignment or sexual orientation if they do not have an evidence base. It is therefore important to record data for this purpose and use it to aid service design.

If your organisation is monitoring many of the Equality Act (2010) protected characteristics, e.g. race, age, sex and disability, why leave out sexual orientation or trans identity? If you do, then you have a data gap, plus it sends a message that these are less important to monitor than the others.

The most inclusive way to monitor is to have open fields so that respondents can respond in a way that is completely congruent with how they feel e.g. If you want to ask about gender you could put:

‘I would describe my gender as:______’

Larger organisations can find this approach hard to draw data from however, so many organisations opt for using some pre-defined categories, whilst also having an ‘other’ option.

There is no perfect system for this, and language is always changing, so it is useful to consult with users of services when developing your system.

Some useful things to note however are:

- It is important to ask sexual orientation as a separate question to a question about trans status because trans status is not a sexual orientation.
- It is also important to separate out trans status from a gender question, because trans status is not a gender identity, but a relationship to gender, e.g. you can be trans and a woman.
- It is important to ask people about their pronouns so they have opportunity to let you know how they like to be addressed and to avoid being misgendered.
Here is an example of how you might like to record this data:

1. How do you currently describe your gender?
   A woman ☐
   A man ☐
   Non-binary ☐
   In another way? ☐ (Please describe: ____________)
   Prefer not to say ☐

2. Do you identify as trans/ transgender?
   Yes ☐
   No ☐
   In some ways ☐ (Please describe: ____________)
   Prefer not to say ☐

3. How do you describe your sexual orientation currently?
   Lesbian ☐
   Gay ☐
   Bisexual ☐
   Straight (Heterosexual) ☐
   In another way? ☐ (Please describe: ____________)
   Prefer not to say ☐

4. What pronoun do you use? (the word you’d like us to use for you when not using your name)
   She ☐
   He ☐
   They ☐
   Other ☐ (Please describe: ____________)

The invisibility of people who are lesbian, gay, bisexual and trans (LGBT) people on monitoring forms compounds a wider general invisibility. If people who access services or groups do not see themselves represented, then they will feel less able to be out and comfortable. Undertaking inclusive monitoring will help LGBT people feel welcome in your services and more able to get what they need.

Good luck and please contact us if you would like further guidance:
info@theproudtrust.org