

# **Equality Monitoring Analysis of Services and Functions**

**July 2014**

**Guidance on corporate categories for use in the  
monitoring and equality analysis of Council  
services.**

**Guidance re: on-going monitoring for impact.**

## **Introduction**

### **1. What is equality monitoring?**

Equality monitoring is the process of gathering equality information in relation to customers or staff and analysing the data in order to identify areas for improvement, in order to help ensure equality of access, both in terms of service delivery and employment opportunities.

Equality monitoring is central to ensuring that we continually improve our service delivery by enabling services to know who their customers are, look at possible diverse needs and barriers to equal access. Equality Monitoring importantly helps to ensure that our customer base is representative of the wider population.

In relation to employment, equality monitoring enables us to establish whether we are recruiting a diverse workforce that is representative of the communities who live, work and use services in the borough.

### **2. Why Monitor\_?**

- To know who is accessing and using services
- Under representation or over representation of groups
- As a possible indicator to investigate further: monitoring can help identify trends and patterns
- To help review, develop and assess services; to identify possible needs, impacts and identify further investigations where necessary
- Basic management information: helps in the provision of appropriate and quality services
- To assess possible barriers to accessing services

#### **2.1 Thus, equalities monitoring is needed to -**

- Help undertake equality impact and needs assessments
- Helps in understanding on-going monitoring for impact ( together with other information e.g. complaints, user feedback etc )
- highlight inequalities
- investigate the causes of inequality
- take action to reduce and remove inequalities
- to highlight and meet different possible needs

#### **2.2` Analysing equality monitoring data can**

- show under or over-representation of a service by a particular community
- reveal trends and patterns and indicators of possible discriminatory impact
- provide evidence that services are not discriminatory

- measure service effectiveness and effectiveness of service changes
- Identify the need for new or changed services

### **3. Council Policy**

Effective equality monitoring helps us evaluate our implementation of the Council's Equality and Diversity policy. See link for a copy of the current policy.

[http://rio/home/our\\_organisation/equalities\\_and\\_diversity\\_at\\_richmond/corporate\\_equality\\_and\\_diversity\\_policy\\_statement.htm](http://rio/home/our_organisation/equalities_and_diversity_at_richmond/corporate_equality_and_diversity_policy_statement.htm)

- By appropriate and relevant monitoring the Council can determine how well policies promote equality, whether there are levels of discrimination and how effective our employment or service delivery is in relation to the different equality groups.
- Critically, if we cannot measure or evaluate what we are doing, how can we effectively manage and ensure that we are meeting diverse needs ?

#### **3.1 It also allows the council to show:**

- our services are delivered in a fair and equal way to all our customers
- that customers who use our services are not further disadvantaged because of the way we deliver our services
- how to shape new and existing services around customer needs
- a generally increased understanding of the needs of non-users and our residents
- find out whether customer satisfaction rates vary between different communities.

#### **3.2 Monitoring is more than just data collection**

It is important to regularly analyse and question the equality monitoring data, then follow up and tackle any barriers or failures it has highlighted. If information is just collected and not analysed it is a waste of time.

Equality monitoring is a tool for the council to analyse the use and experiences of service delivery by different groups of people and, where necessary, to take appropriate action to improve those services. It is most useful when it is incorporated as part of a survey or consultation.

#### **3.3 Monitoring never stops**

Monitoring is part of an ongoing process of analysis, asking questions, investigation, and change. It is important to monitor the effects of any action you have taken, to see if improvements are being made. The Public sector equality duty 2011 is also an on-going duty.

## 4, Our legal requirements

### 4.1 Equality Act 2010 and PSED 2011

The Equality Act 2010 brought together previous equality legislation and also strengthened and extended areas. For further detail see Equality and Diversity RIO pages.

[http://rio/home/our\\_organisation/equalities\\_and\\_diversity\\_at\\_richmond/equality\\_act.htm](http://rio/home/our_organisation/equalities_and_diversity_at_richmond/equality_act.htm)

[http://rio/home/our\\_organisation/equalities\\_and\\_diversity\\_at\\_richmond/public\\_sector\\_equality\\_duty.htm](http://rio/home/our_organisation/equalities_and_diversity_at_richmond/public_sector_equality_duty.htm)

The Public Sector Equality Duty ( PSED ) came into force in April 2011. The PSED requires public bodies to consider, and have due regard to the needs of diverse groups in a proportionate and relevant way, when designing, evaluating and delivering services in order to:

- eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under the Equality Act (2010);
- advance, not merely promote, equality of opportunity for persons who share a relevant protected characteristic compared to persons who do not share it;
- foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

considering the full range of what are now known as 'protected characteristics' (previously equality strands) –

- Race
- Disability
- Gender
- Age
- Religion or belief
- Sexual orientation
- Gender reassignment
- Pregnancy and maternity
- Marriage and civil partnership (eliminating discrimination only)

<http://www.equalityhumanrights.com/private-and-public-sector-guidance/guidance-all/protected-characteristics>

**4.2 Due regard** is about taking into account and giving weight to different needs of protected groups in relation to the three aims of the duty. It is about addressing and preventing disadvantage for any protected group and taking the opportunity to promote equality and good relations where possible.

### 4.3 On-going Monitoring for Impact:

**Public sector equality duty** is an on-going duty. Equality monitoring analysis information enables us to assess and evaluate impacts and needs of diverse

groups as an on-going activity and thus is integral to an effective implementation of our statutory and policy equality and diversity commitments. On-going monitoring for impact can draw upon a range of information, including complaints, user feedback, survey results as well as equality monitoring analysis.

#### **4.4 Annual Publication of equality monitoring information and analysis as part of annual equality performance reports**

The information published by a public authority must include, in particular, information relating to persons who share a relevant protected characteristic including employees and those affected by its policies and practices ( e.g. service users ).

This includes both **quantitative** (numerical) and **qualitative** (descriptive) information. Qualitative information may focus more on factors which are more difficult to measure or represent in quantitative terms. It can help to deepen understanding as to why certain patterns are occurring and of the effects of our policies and practices. Thus when considering the most effective ways to gather information about analysis of impact, it is useful to consider qualitative as well as quantitative approaches, especially where small numbers are involved.

Qualitative approaches to collecting information about needs and experiences of protected groups are therefore also important and sometimes may produce more useful information than routine quantitative monitoring data collection. Blanket data collection for collection sake is of little use. A more targeted approach drawing upon local and national research studies and engagement feedback would allow us to begin to prioritise where resources can best be focussed, in order to tackle issues of greatest priority.

The Council thus has a statutory duty under the Public sector equality duty 2011 to monitor the users of its services and functions, including employment. However we are asked to undertake equality monitoring in a relevant and proportionate way.

## **5. Relevance and Proportionality**

Appendix one contains corporately agreed equality monitoring categories for use by Council services and functions. However, all service areas and functions may not need to use all areas. For example, language or religion/belief may be appropriate and relevant for some service areas and functions, but not all areas. This information will be needed to assess needs levels in specific service areas, for example, health, social care, education, arts and cultural services. It may also be important for specific understanding of discriminatory impact, e.g. complaints of harassment or discrimination.

In employment areas, for example, all areas will need to be monitored, in order to be able to assess equality of access, equal treatment and representativeness of the workforce.

Targeted approaches should also be considered. For example, finding out about the needs and take up of relevant services for LGBT groups may be more effectively obtained through undertaking specific surveys.

It is important to consider the task/area at hand and use the corporate equality monitoring categories appropriately.

### **5.1 Questions to ask:**

- **What is the purpose of collecting equality monitoring information and analysis in this area ?**
- **How do you intend to analyse and use the information ?**
- **How relevant is each protected characteristic for the purposes of monitoring in this area ?**
- **Are their more proportionate ways of collecting this information for the purpose of this exercise ?**

We need to decide what level and detail of monitoring we need to put in place to meet the duty. This means taking account of four factors:

- how important the service, policy or workforce issue we want to monitor is
- whether the information we need is already available from other sources or is monitored nationally
- what kind of monitoring we need
- how easy or difficult it will be to get complete information.

Importantly, what needs to guide where we collect equalities monitoring information should be what we plan to do with it. We need to think through the logic of why we need this information and how we plan to use it as part of deciding where we need to collect it. It will not be needed for all areas, but it will be important for key and relevant service areas and functions.

Relevance is not always easy to assess or understand, please seek further help where needed from Corporate Equality.

**Please contact Corporate Equality Manager ( 0208 891 7829 ) or [s.ranganathan@richmond.gov.uk](mailto:s.ranganathan@richmond.gov.uk) for further advice where needed.**

## **6. What information should be collected?**

Every service area needs to reflect on collecting monitoring data and what level of data it must collect, as outlined in previous sections above, especially relevance and proportionality.

Consistency is also important, which is why corporate equality monitoring categories as provided in appendices one and two should be used.

### **In service delivery, monitoring can cover, for example:**

- Applications and access (for example, services such as housing, social care, planning)
- Take up of service (for example, services such as libraries or sport)
- Satisfaction
- Complaints
- User surveys

### **See Appendix three for detailed examples of some service areas:**

### **In employment, monitoring can cover:**

- Workforce profile
- Recruitment and selection (application, shortlist and appointments)
- Promotion
- Training
- Harassment complaints and grievances
- Disciplinarys
- Appraisals
- Leavers, redundancies, dismissals, retirement
- Perception (staff survey) by different groups of staff

## **7. Methods of data Collection**

### **Self classification and Voluntary**

The best way to collect equality monitoring data is to get it directly from the individual as part of your existing information-collecting processes. For example, if you use an application form or an interview with the client to get basic information, this is where you should ask about for example, ethnic background. Or, if you use an interview to check and fill in information given on forms, you can do the same with the equality monitoring data. You can also get this information over the phone, when a client first calls to apply for a service.

Integrate data collection methods as far as possible within existing information collection systems.

You should make sure that people have the information and time they need to make an informed decision about the classification they are comfortable with.

For example with ethnic monitoring data you may want to use a two-stage system, which asks people first to choose from among the main headings, and then from the sub-categories of the heading they have chosen. However, if someone asks for information about all the main and sub-categories, you should give this to them. If people are making their choice in a telephone interview, you may have to read all the categories out more than once.

When you need equality monitoring data for a one-off exercise (such as a survey of who is using a service), you could ask for the information through a questionnaire, and follow this up, if you need to, with a letter or phone call.

### **7.1 Summary:**

- Self-classification by individuals themselves is the most accurate and is the recommended way. If this is not possible, classification could be done by a family member of the client.
- Information should only be collected once rather than at each point of contact with the Council. This could be through the CRM ( Customer Record Management system and database ) and we need to investigate how as a Council we can do this.
- Choose the method that best suits your service. Think about your customer service points. Do your staff meet users face to face or by telephone? Do users fill out an application form? Measure both who applies and who is successful. Collection of data should therefore be either:
  - Through application forms
  - Collected at face to face contact or by telephone
  - Through snapshot surveys or other consultation methods (see the Council's consultation guidelines).

**See appendix one for full list of equality monitoring categories and appendix two for race/ethnicity analysis :**

## **8. Explaining to customers why we are collecting this information**

### **8.1 Contextualise to service area where possible**

Try and encourage as far as possible. The Council has a statutory duty, but it is voluntary if a person chooses to complete the information or not. Where possible contextualise within service/function area concerned, adapt examples above and relate to area or survey at hand.

We must ensure people know why the information is being collected, what we intend to do with it and how we will confidentially maintain it and only use in statistical format for dissemination to others and for publication.

The information will be treated in confidence and access to it will be tightly restricted. None of the statistical information will be used in a way that can identify individuals.

### **8.2 Examples of explanatory paragraphs:**

*For example:*

*'We would appreciate it if you could please take the time to complete the following information about yourself to help us improve our knowledge about users of our services and enable future service improvements...'*

*'...the information will be used to monitor and analyse staff and user profiles and thereby improve services. The information may also be used to meet individual need. The information will be treated in complete confidence and access to it will be strictly restricted. None of the statistical information will be used in a way that can identify individuals.'*

**See also appendix five for FAQ sheet for customers.**

## **9. How will the information be stored and used ?**

It is important to develop and integrate equality monitoring data collection systems with other information database systems held by service areas and functions. This will enable more systematic data collection systems and periodic and regular analysis.

If data is collected and just kept as hard copies on a shelf, it will be more onerous and time consuming to analyse. Unless data is used and analysed it is misleading and wasteful to collect it.

## 10. Analysis of data

- **Baseline population data**
- **Analysing and Reporting Monitoring Information**
- **Meaningful Analysis; relevance and proportionality**
- **Under representation or Over representation**

The purpose of analysing the data you collect is to identify differences between groups, monitor trends, and tackle any unfair barriers. To do this you need to check regularly whether there are differences between groups and whether these are significant. Your aim must be to make sure you promote equality and treat people all groups fairly, whatever their numbers in the population you are analysing.

- All monitoring data collected should be analysed. Analysis will help understand what the numbers mean and how they can assist in changing policy or practice.
- If monitoring is ongoing, analyse the data at regular intervals to see if trends are developing.
- The effectiveness of monitoring is based on interpreting the significance of the figures and their relevance for your service area.
- For benchmarking, use the census information given in *Knowing Your Communities* and on the Equality and Diversity site on DataRich..... You may need to undertake some form of consultation to find out why certain groups are not using a service or are unhappy with the service they receive.
- No monitoring is perfect. Each service area needs to be practical and realistic when analysing data and identify ways of improving data collection.
- *If your figures are not in proportion to the population it does not necessarily mean that the policy is failing. You need to find out why and see if the disproportionality is justified.*
- *If the disproportionality is not justified, measures need to be put in place to either change the policy or mitigate against the negative effects of the policy.*

### **Equality and Diversity Repository on DataRich**

The above site on DataRich brings together into one site all relevant information, data and equality analysis relating to the nine protected characteristics ( equality strands ). Equality analysis is key to our equality and diversity work; for informing our equality priorities, objectives and actions and for the evaluation of equality outcomes achieved.

#### **10.1 Setting targets**

If your analysis shows that change is necessary, you will need to consider setting targets to enable you to assess whether the measures you take are

successful. Targets or goals are predictions of what you expect to achieve over a given period of time.

Targets should be framed as outcomes for particular groups (women, men, different ethnic groups, different categories of disabled people, different age groups and so on). For most services the aim will be to reflect the proportion of any groups of staff or users with the proportion in the community (census data). Targets should be set to reflect this (or move towards it).

Targeted services require a different approach. For example, a service could be specific for a certain age group; here the comparison would be in terms of gender, ethnicity and disability within the population in that age group

## **11. Confidentiality and Data Protection**

You must take full account of the Data Protection Act 1998 when you collect, store, analyse, and publish equality monitoring data (see appendix 1).

Everyone involved in the process of gathering, collating and analysing data should ensure that information on individuals is kept confidential. Only aggregated data records should be available. There should be compliance with the Council's data protection policy, and also with customers' rights of access to information.

No information should be published or provided which can identify individuals. Thus care should be taken with small numbers to ensure that when publishing or providing the information ( e.g. FOI requests; requests from the press ) no individuals could be identified. Disclosure of someone's transgender identity, for example, is a criminal offence.

It is important to reassure people that we will maintain all equality monitoring information provided to us in a secure and confidential way and that the information will only be shared and disseminated in a statistical format for general purposes.

### **11.1 Data Protection Act 1998**

#### **How will monitoring information be kept and who will have access to it?**

The Data Protection Act 1998 requires any information contained on the Equality Monitoring Form to be processed, accessed and retained as laid out in its Codes of Practice. This means that when people complete the monitoring form they should be aware of the following:

- can they be identified from the form ?
- where will the information be kept ?
- how will the information be used ?

- who will have access to the information ?

Access to equality monitoring information must be restricted to officers who will use it for monitoring purposes and guarantee that the information is subject to strict security procedures

## **12. Contractors and Providers**

All contractors and providers will need to demonstrate how they implement their responsibilities under the Equality Act 2010 and related Codes of Practice.

However, employment equality monitoring information and analysis only applies to those who employ 150 or more staff.

All suppliers from whom the council procure services must demonstrate how they support the council in meeting its public duties to promote equality, as relevant and proportionate to the area at hand.

## Appendix One

### Monitoring questions

#### EQUALITIES MONITORING CATEGORIES: 2013

1. The following categories can be used in a horizontal format as on the current complaints procedure form. In order to maintain consistency these are the categories which can be used.
2. You can condense the ethnic monitoring categories as outlined on the form and in appendix 2, as appropriate to the purpose of your exercise. For example, in consultations undertaken, which involve relatively small samples, it may be more appropriate to use the overall 6 ethnic group classification categories as opposed to the 18/20 used in on-going service monitoring. The 18/20 long list ethnic group classification is based on the ONS census categories. This enables us to compare with borough demographic data.
3. Please see examples of explanatory statements on the equality and diversity site on RIO and on page 9 of this guidance. These need to accompany use of equalities monitoring categories. It is important to always briefly explain why you are collecting this information and how you propose to use it. The information will be maintained confidentially and used in statistical format only to help us evaluate equal access to our services and assess different needs.
4. There will also be external publicity ( see appendix 5 ) to help explain to staff and communities why we collect this information, how we confidentially maintain it and what we intend to do with it.
5. For employment purposes the use of equalities monitoring information is now quite routine and standard. However, for service delivery a great deal of thought and planning is needed in terms of where it is relevant to collect equalities monitoring information. The basic question to ask is how do you plan to use the information you collect. It is not enough to collect it and then not have systems in place to confidentially store and analyze it; in order to plan, assess and review services and functions. It requires an organizational culture where we routinely collect and analyze information and data to review and assess what we do.
6. Monitoring for customers' and service-users' sexual orientation and gender re-assignment should only be carried out by services **where there is a direct relevance to the service/function delivered** or where the service will be delivered in a different way to customers who belong to these communities e.g. in home or residential care situations where the care provided needs to cater for individual preferences, or for recording civil partnerships. Managers of individual services need to decide when such monitoring is relevant.

7. Information relating to gender re-assignment should in particular be handled with care. No information should ever be published or shown to others if a person could be identifiable, even when using it in statistical format. It is a criminal offence to disclose this information, even inadvertently. All equalities monitoring information should be maintained confidentially and published analysis handled with care.
  
8. Monitoring for customers' and service-users' faith/belief/religion should only be carried out by services **where there is a direct relevance to the service/function delivered** or where the service will be delivered in a different way to customers who belong to these communities e.g. in home or residential care situations where the care provided needs to cater for individual preferences. Managers of individual services need to decide when such monitoring is relevant.

**Please contact Corporate Equality Manager ( 0208 891 7829 ) or [s.ranganathan@richmond.gov.uk](mailto:s.ranganathan@richmond.gov.uk) for further advice where needed.**

**Example of explanatory paragraphs to use at the start of all monitoring forms:**

*We would appreciate it if you could please take the time to complete the following information about yourself to help us improve our knowledge about users of our services and enable future service improvement.*

*The information provided will be used to monitor and analyse staff and user profiles and thereby improve services. The information may also be used to meet individual need. The information will be treated in complete confidence and access to it will be strictly restricted. None of the statistical information will be used in a way that can identify individuals.*

**ETHNIC BACKGROUND:**

Please indicate your ethnic background

**A White**

- English / Welsh / Scottish / Northern Irish / British
- Irish
- Gypsy or Irish Traveller
- Eastern European
- Any other White Background

Please describe.....

**B Mixed / Multiple ethnic groups**

- White & Black Caribbean
- White & Black African                       White & Asian
- Any other Mixed / Multiple ethnic background

Please describe.....

**C Asian or Asian British**

- Indian                       Pakistani                       Bangladeshi
- Chinese                       Afghan
- Any other Asian background

Please describe.....

**D Black / African / Caribbean / Black British**

- Caribbean                       African
- Any other Black / African / Caribbean background

Please describe.....

**E Other ethnic group**

- Arab                       Any other ethnic group

Please describe.....

**F  Prefer not to say**

○ **DISABILITY:**

**Do you have any disability ?**    **YES**       **NO**

**If yes please specify.....**

- Physical impairment**                       **Sensory impairment**
- Mental Health condition**               **Learning disability/difficulty**
- Other please specify.....**
- Prefer not to say**

**Gender and gender reassignment ( include transgender only in areas as relevant )**

**Are you ?**

- Male**                       **Female**                       **Transgender**
- Prefer not to say**

**What is your Age?**

- Under 16**                       **16 – 24**                       **25 – 34**                       **35 – 44**
- 45 – 54**                       **55 – 64**                       **65 – 74**                       **75 – 84**
- 85+**                               **Prefer not to say**

**\* Please note that age categories may vary according to the purpose of the exercise being undertaken.**

**Only include below where relevant :**

**What is your religion/belief ?**

- No religion/belief**
- Christian (including Church of England, Catholic, Protestant and all other Christian denominations)**
- Buddhist**                       **Hindu**                       **Jewish**
- Sikh**                               **Muslim**
- Any other religion/belief,**  
**Please specify.....**
- Prefer not to say**

**Which of the following options best describes how you think of yourself?**

- Heterosexual**       **Gay Man**       **Gay woman or Lesbian**       **Bisexual**
- Other**
- Prefer not to say**

**\*\*LANGUAGE SPOKEN**

**Please specify.....**

**\*\* Language spoken would only be needed for certain service areas**

**MARRIAGE AND CIVIL PARTNERSHIP ( only to be asked where relevant )**

Suggested categories:

Are you:

- Married
- In a civil partnership
- Prefer not to say

**PREGNANCY AND MATERNITY ( only to be asked strictly where relevant, will only apply to a few areas )**

Suggested question:

Have you been pregnant and/or on maternity leave during the past 26 weeks?

- Yes
- No
- Prefer not to say

**See link below for further explanation re: protected characteristics**

<http://www.equalityhumanrights.com/private-and-public-sector-guidance/guidance-all/protected-characteristics>

**Further Advice and Support:**

**Corporate Equality Manager: 0208 891 7829**

[s.ranganathan@richmond.gov.uk](mailto:s.ranganathan@richmond.gov.uk)

## Appendix Two: Groups for analysis by race and ethnicity

Ethnic groups (18/20)	Broad ethnic groups (6)	Top level ethnic groups (3)
White -English/Welsh/Scottish/ Northern Irish	<b>White British</b>	<b>White British</b>
White Irish	<b>White Other</b>	<b>White Other</b>
White Gypsy or Irish Traveller		
White Eastern European		
White Other		
Mixed: White and Black Caribbean	<b>Mixed/Multiple Ethnic Groups</b>	<b>BME</b>
Mixed: White and Black African		
Mixed: White and Asian		
Mixed: Other mixed		
Asian/Asian British: Indian	<b>Asian/Asian British</b>	
Asian/Asian British: Pakistani		
Asian/Asian British: Bangladeshi		
Asian/Asian British: Chinese		
Asian/Asian British: Afghan		
Asian/Asian British: Other Asian		
Black/Black British: African	<b>Black/African/Caribbean/Black British</b>	
Black/Black British: Caribbean		
Black/Black British: Other Black		
Other: Arab	<b>Other Ethnic Group</b>	
Any other ethnic group		

## **Appendix three: Examples of areas where equality monitoring information can be usefully collected and analysed ( as suggested by the Equality and Human Rights Organisation )**

### **Housing**

- Homelessness applications and acceptances
- Time spent in temporary accommodation
- Type and quality of housing offered
- General housing applications
- Time spent on housing waiting list
- Housing transfer applications
- Housing transfer offers
- Housing transfer acceptances
- Satisfaction with repairs, estates services, and housing management
- Reports of racist incidents and outcomes
- Complaints by service users
- Nominations to outside agencies, including housing associations, and outcomes

### **Benefits**

- Benefit applicants and recipients
- Types of benefit
- Time taken to process applications
- Claimant satisfaction survey

### **Adult and Children Social Care Services**

- Children on child protection register
- Children in residential care
- Children in foster care
- Children awaiting adoption
- Children with three or more placements in past 12 months
- Non-allocated children's cases
- Home care: applicants, recipients, satisfaction surveys, and reviews
- Community care: applicants, recipients, satisfaction surveys, and reviews
- Day care: applicants, recipients, satisfaction surveys, and reviews
- Occupational therapy: applicants, recipients, satisfaction surveys, and reviews
- Adult residential care: applicants, recipients, satisfaction surveys, and reviews
- Physical and learning disability, and mental health services: applicants, recipients, satisfaction surveys, and reviews
- Compulsory mental health detentions
- Complaints across all services

### **Environmental Health**

- Requests for advice
- Visits
- Inspections and prosecutions
- Special needs (including language needs)

- Applications for home-improvement grants and outcomes
- Satisfaction surveys
- Complaints by service users

### **Planning and Licensing**

- Applications and outcomes
- Types of application
- Objections
- Satisfaction levels
- Complaints by service users

### **Economic development and regeneration**

- Beneficiaries of regeneration initiatives
- Make-up of regeneration and New Deal boards
- Representation in multi-agency partnerships (for example, local strategic partnerships)
- Outcomes of bids for funding
- Applications for neighbourhood renewal funding, community chests, and community empowerment funding, and outcomes
- Financial and other help to small businesses
- Requests for advice
- Satisfaction levels
- Complaints by service users

### **Library and leisure services:**

- Service users
- Satisfaction surveys
- Complaints by service users

### **Education:**

- Teacher profiles
- LEA staff profiles
- Pupil attainment data
- Pupil exclusions
- Pupils with English as an additional language
- Pupil admissions
- Under-fives centres: applications and outcomes, and pupil profiles
- School meals: users' profile
- Complaints across all services

## **Appendix Four:**

Sources of further guidance on different equality strands and equality monitoring:

The first three guides listed below are available from

[www.equalityhumanrights.com](http://www.equalityhumanrights.com)

- **Race:** *Ethnic Monitoring: a guide for public authorities* (CRE). Sections on employment, education, housing, benefits, social care, environment, planning, regeneration, leisure.
- **Disability:** *Guidance on Gathering and Analysing Evidence to Inform Action* (DRC). Sections on employment, education and service delivery.
- **Gender:** *The Gender Duty and Local Government* (EOC). Sections on employment, education, children, adult services, transport, democratic engagement, environment services and leisure.
- **Sexual orientation:** *How to Monitor Sexual Orientation in the Workplace* (Stonewall). <http://www.stonewall.org.uk>
- **Transgender:** *Trans Equality Monitoring* (Press for Change) [www.pfc.org.uk](http://www.pfc.org.uk)
- **Religion/Belief:** contact Corporate Equality Manager for assistance
- **Age:** Age Concern [www.ageconcern.org.uk](http://www.ageconcern.org.uk)

## **Appendix Five**

### **Fairness For All**

The Fairness for All leaflet once agreed will be available at Council reception and information desks.

The draft content of the leaflet is as follows:

#### **Why do we monitor?**

In Richmond we take pride in our services. We want to know that all residents and all those who use our services know how to access services by providing various means of communication for people who are disabled or have language difficulties. We also need to know that decisions to provide a service are made in a fair way and that services are provided in a way that meets diverse needs.

By you filling in the equality monitoring form it will help us to better understand who lives in our borough and possible diverse needs of all who access and use our services. The information will help us to make sure our services are provided fairly and are easily accessible.

#### **What is equality monitoring?**

There are key areas that we ask you to consider and tell us which you feel you belong to:

- age
- disability
- ethnicity
- gender
- religion or belief
- sexual orientation

#### **Confidentiality**

We know that the monitoring questions are very personal and private. We will treat the information you provide in a sensitive and confidential way as required under the Data Protection Act. This information will also be used to inform future actions and plans on service delivery; however this will only be statistical data and therefore it will not be possible to identify specific individuals. We will always ask for your consent if it is necessary to pass on information about you personally in order to provide you with the services you require,

### **Do I have to fill in the form?**

Filling in the form is voluntary and your choice; you may fill in all or some parts of the form. However, it will help us the most if you complete the whole form. We appreciate you taking the time to complete the information on the monitoring form, which will help us to improve services for all.

### **What do we find out?**

The information you provide on the form will help us understand our service users. It mainly tells us who is using our services and, more importantly, who may not be using our services. It builds a picture of our communities' needs.

It gives us an understanding of the people who live, work and use services in the borough. It tells us about an individual and their needs, when they use our services and what we must consider to enable us to provide services in a way which is able to meet diverse needs.

### **What do we do with the information?**

We will use the information you give us about yourself and the services you already use or need to help us forecast future needs for the community. It will help improve and plan the future services we provide.

It is very important we tell you why we carry out equality monitoring. We hope that the information we have provided helps you understand why we ask you these questions.

The most important reason for a council to gather monitoring information is to ensure that everyone is able to access their services.

If you have any further questions please contact:

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