Workshop

Stonewall Workplace Equality Index

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Making the world
a more inclusive place,
one organisation at a time

THE INCLUSION IMPERATIVE

Established 2022

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watch?v=M9C4U86XdMU

As Managing Director, and Chair of its LGBTQ+ network for 8+ years, took former employer, Macquarie Group, to #1 in the current Stonewall rankings

Included in the current version of The Guardian's Pride Power List of the 100 most influential LGBTQ+ people in the UK

Twice (2018 and 2022) named as a shortlist nominee for the 'Corporate/Business Role Model' award at the PinkNews Awards
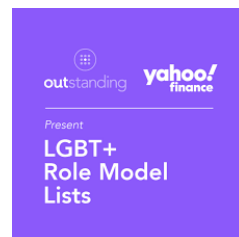
Three times (in 2018, 2019 and 2021) ranked in OUTstanding's annual list of the 'Top 100 LGBTQ+ Executives' globally (sponsored by the Financial Times/Yahoo Finance)

Won the award of 'LGBT+ Inspirational Leader' of the Year at the British LGBT Awards in 2019

Overview

What does the index measure?

Section	Title	Points available	Focus
1	Policies and benefits	17	Mainly HR-related policies and systems etc
2	The employee lifecycle	22	Mainly HR focused, but also internal comms
3	LGBTQ+ employee resource group	26	ERG: its activity and supporting infrastructure
4	Empowering individuals	20	Focus on LGBTQ+ staff and allies
5	Leadership	18	Focus on Board and senior management
6	Monitoring	20	All about data: mainly HR focused
7	Supply chains	17	Influencing suppliers: procurement focused
8	External engagement	40	Working with charities etc: ERG and HR focused
-	Staff Feedback Questionnaire	20	All-staff survey: internal comms focused
Total		**200**	

Suggested focus areas

Section	Title	RAG rating	Scoring ambition
1	Policies and benefits	R	Maximum (or close to maximum)
2	The employee lifecycle	R	Maximum (or close to maximum)
3	LGBTQ+ employee network group	R	Maximum (or close to maximum)
4	Empowering individuals	A	High to moderate
5	Leadership	A	High to moderate
6	Monitoring	G	Low to moderate
7	Supply chains	A	Moderate
8	External engagement	A	High to moderate
-	Staff Feedback Questionnaire	R	Maximum

Planning and project management tips

❑ Aim to leave no easy points 'on the table'

❑ Any recommendations by Stonewall in its feedback should be pursued (and explicitly described in future answers)

❑ Undertake a detailed planning exercise, led by the LGBTQ+ ERG – gap analysis to generate prioritised, resourced, time-bound action points

❑ Detailed project management approach should be adopted

❖ Database of reference resources, e.g. dates

❖ Time-bound responsibility for each section

❖ Timetabled review and feedback loop

❖ Final review and submission

Execution ('exam technique') tips

❑ Think creatively, e.g. where info can be used in more than one question, so as not to forego marks

❑ Be 'mercenary'! – i.e. where easy wins are available (e.g. with one-off actions like donations or buying some of Stonewall's Rainbow Laces), take them

❑ Use word counts effectively – high word limits are an indication of importance, and so demand more emphasis and detail

❑ Structure answers impactfully – think like a journalist and make sure the key matters are clear, rather than buried in long paragraphs of prose. Make use of bullet points, sub-headings, CAPS, etc to achieve this

❑ Be clear about dates where relevant (e.g. XX/YY) – this affects eligibility of evidence

❑ Pay attention to guidance commentary in questions – they are a roadmap!

High Priority Sections

Question	Commentary
1.1	Ensure all HR policies can be viewed by ALL employees, e.g. via an intranet portal – and that an invitation to give feedback, and the methodology for doing so, are given clearly
1.2 & 1.3	Carry out an 'audit' of discrimination, bullying and harassment policies (with HBT examples), and leave-related policies (for gendering or bias)
1.4 & 1.5	Introduce trans policies and guidance documents
1.6	Are gender-neutral facilities available? – NOT just accessible spaces
1.7	'Audit' of healthcare insurance policies – partners, mental health, trans

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Question	Commentary
2.1	Recruitment: info for candidates about LGBTQ+ inclusion and resources
2.2	Training of recruitment staff to ensure inclusive practices (incl LGBTQ+)
2.3	Materials and info given to all new employees
2.4	Workplace systems: gendered?
2.5	All-staff training about discrimination, bullying and harassment, and how to challenge it – including LGBTQ+ related examples
2.6	Internal communications about LGBTQ+ identities, resources, policies etc
2.7	Performance appraisals – recognition of contributions
2.8	Learnings from exit interviews

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Question	Commentary
3.1	ERG and its terms of reference
3.2	How the ERG is supported and empowered
3.3	ERG's inclusion of the full acronym – strategy, infrastructure
3.4	ERG's inclusion of intersectional groups – selection, strategy
3.5	Role of the ERG in providing confidential support, facilitating reporting of HBT bullying or harassment, and giving input to improve policies etc
3.6	Activities of the ERG: social, full acronym, collaborative, mentoring etc
3.7	Activities of the ERG: intersectional
3.8	ERG: outreach to all locations

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Staff Feedback Questionnaire

❏ Evidence submitted separately (and LATER)

❏ Need to demonstrate that it was sent to ALL staff

❏ Request should come from a senior executive, e.g. the executive sponsor of the ERG

❏ A good response rate is targeted – aim for at least 25% of ALL staff

❏ To get a good response rate:

  ❏ Emphasise that is it entirely confidential

  ❏ Emphasise that results are not even seen internally

  ❏ Make it easy – e.g. with links

  ❏ Get reply rate updates from Stonewall – and keep reminding staff!

Medium Priority Sections

Question	Commentary
4.1	LGBTQ+ staff: L&D, training, external conferences, external forums, speaking at events, reverse mentoring programme participation etc
4.2	Internal comms or events about intersectional LGBTQ+ people
4.3	Internal allyship programme
4.4	Bi-related training and resources for / available to all staff
4.5	Trans-related training and resources for / available to all staff
4.6	Intersectional LGBTQ+-related training and resources for / available to all staff
4.7	Outreach to all locations: intranet, emails, virtual / hybrid events, ambassadors, roadshows etc

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Question	Commentary
5.1	Reverse mentoring, peer group mentoring, LGBTQ+ conferences / seminars
5.2	Activities: internal messaging, speaking (internally and externally), involvement with ERG and LGBTQ+ inclusion strategy
5.3	Outreach to all locations: intranet, virtual / hybrid events, emails, etc
5.4	Inclusion criteria for recruitment / promotion of all senior mgt / line managers
5.5	Inclusion criteria for performance appraisals of all senior mgt / line managers

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Question	Commentary
7.1	Requirements imposed on potential suppliers: DE&I strategy (incl LGBTQ+), policies and monitoring of HBT bullying, harassment and discrimination, policies covering transitioning at work – and how procurement team members are trained to enforce these expectations
7.2	Procedure for addressing situations when the above requirements are not met – pre- or post-contract
7.3	Monitoring and enforcement of expectations on suppliers
7.4	Engagement and collaboration with suppliers – training, advisory, participation
ALL	Focus on SUPPLIERS, not providers of 'overhead'-type services

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Question	Commentary
Category	Organisations servicing individuals (e.g. retail) must answer all 12 questions. Organisations not servicing individuals (e.g. retail) must answer only the first 4 questions, which are therefore **triple-weighted**
8.1	One of the biggest differentiating questions! Categorise work done as (a) long-term, (b) one-off or (c) in between with LGBTQ+ charities / community groups which relate to each of (i) LGBTQ+ (ii) Bi (iii) Trans (iv) intersectional LGBTQ+
8.2	External messaging through social media accounts demonstrating organisational support of equality for (i) LGBTQ+ (ii) Bi (iii) Non-Binary (iv) Trans people
8.3	Support of external LGBTQ+ campaigns – e.g. Rainbow Laces, or various LGBTQ+ key dates (like NCOD), charitable campaigns etc
8.4	Efforts to promote LGBTQ+ inclusion within the sector – e.g. collaborations, advice, sharing, forums / platforms etc

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Lower Priority Sections

Question	Commentary
6.1	Data gathering about sexual orientation of staff through forms / systems
6.2	Data gathering about gender (incl non-binary) of staff through forms / systems
6.3	Data gathering about gender identity of staff through forms / systems
6.4	Tracking of LGBTQ+ applicants to appointment: sexual orientation, gender (incl non-binary) and gender identity (trans)
6.5	Tracking of LGBTQ+ staff at different pay grades: sexual orientation, gender (incl non-binary) and gender identity (trans)
6.6	Analysis of LGBTQ+ staff responses to staff satisfaction surveys: sexual orientation, gender (incl non-binary) and gender identity (trans)
6.7	Efforts to boost self-ID declaration rates – rationale, confidentiality, use of data to create improvements, clarification of meanings for understanding etc

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Thank you!

Questions?