

**Community learning and equalities**  
**Glasgow Community Learning Partnership**

**Report on findings**

**May 2007**

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## 1. Introduction and methodology

### 1.1 Introduction

In February 2007, the Glasgow Community Learning Partnership appointed us to:

- produce a model equalities monitoring system and guidance to enable CLD organisations to consistently monitor uptake of activities; and
- develop equalities standards for community learning.

This report sets out our approach to this work, and our key findings.

### 1.2 Methodology

- **Desk top review** – we undertook a review of the CLD context in Glasgow, the monitoring information currently gathered and funder requirements. We also reviewed legal requirements and best practice in equalities monitoring.
- **Consultation with CLD organisations** – we spoke with representatives from CLD organisations and equalities groups in Glasgow. A full list of consultees is included as Appendix One.
- **Learning from others** – we have explored the experience of developing and implementing equalities monitoring systems in a number of other areas. The lessons learned from this experience have been built into the monitoring system and standards.
- **Development workshops** – we held two sessions with people and organisations involved in CLD provision. One session was with the Community Learning Partnership. A wider event was held with equalities groups and other CLD providers. This event was very well attended, with 22 individuals attending.
- **Liaison with funders** – we have discussed the monitoring framework with key funders to ensure this would generally meet their requirements.

## **2. The CLD context in Glasgow**

### **2.1 The framework for CLD provision**

Glasgow's Community Learning Partnership leads the strategic development of CLD activity in the city. It involves:

- Glasgow City Council;
- the voluntary sector;
- further and higher education;
- the business and enterprise sectors – including Scottish Enterprise Glasgow and Glasgow Chamber of Commerce;
- Glasgow Community Planning Ltd;
- Careers Scotland; and
- Greater Glasgow NHS Board.

Local CLD partnerships have also been established in eight areas, to create local plans for CLD activity. A much wider network of organisations is also involved in the provision of CLD activity, including:

- providing formal and informal learning opportunities;
- training for community groups and volunteers;
- support to develop reading, writing, numeracy, language and communication skills; and
- activities to build confidence and encourage people to express themselves or get involved in decisions.

### **2.2 CLD priorities in Glasgow**

The priorities for CLD activity in the city are strongly based on the three national priorities for CLD:

- achievement through learning for adults;
- achievement through learning for young people; and
- achievement through building community capacity.



In Glasgow, these priorities are being taken forward through a focus on activity that is:

- inclusive;
- focused on health and well-being;
- active in encouraging life long learning;
- economically vibrant; and
- informed, involved and expressive.

These top level priorities demonstrate the central commitment to equality and inclusion at the heart of CLD activity in Glasgow.

### 2.3 Equalities monitoring and CLD in Glasgow

In spring 2006, the Community Learning Partnership commissioned research into the equalities monitoring information that CLD providers in Glasgow gather. The research surveyed a wide range of CLD organisations in the city. A relatively low response rate was achieved, meaning that the results should be treated with caution. It is likely that the organisations which are the most committed and interested in equalities issues responded to the survey.

The survey asked about the kind of equalities information gathered by CLD organisations – at any stage of contact with clients.

Equalities strand	Always	Sometimes	Never
Gender	81%	16%	3%
Age	78%	16%	6%
Disability	70%	19%	11%
Ethnic origin	62%	22%	16%
Sexual orientation	0%	8%	92%
Faith	0%	8%	92%

**Figure 2.1: Organisations collecting information on equalities strands**

Source: *Social Equalities Monitoring in Glasgow's Community Learning, March 2006*

Gender, age, disability and ethnic origin were much more commonly monitored than faith or sexual orientation. Further analysis demonstrated that this may be because funders rarely asked for monitoring information on faith or sexual orientation.

Based on the survey and consultation with CLD providers, the study concluded that:

- collection of equalities data is patchy;
- there is no systematic effort to measure and record progress in terms of equalities;
- information is seldom analysed and used to inform service delivery; and
- resources should be invested in creating consistent monitoring arrangements.

## **2.4 Gathering monitoring information across the city**

Based on these findings, the Community Learning Partnership undertook a short piece of work itself. A total of 114 CLD organisations were asked to provide any equality information that they had available for the financial year 2005/06. The focus was on four key areas of equality:

- age;
- sex;
- ethnic origin; and
- disability.

The survey raised a number of important issues about the way equalities monitoring information is gathered and used by CLD providers in Glasgow.

- Only six per cent of the CLD organisations surveyed were able and willing to provide any monitoring information in relation to equalities.
- A further six per cent openly admitted that they did not gather any equality information in these four fields.
- The remainder did not respond, or provided information that was not relevant.
- Where monitoring information was provided, this was very difficult to compare due to differences in the way it had been gathered.
- It was particularly difficult to compare information on the age of service users, as all organisations used different banding categories.

The experience gained by the Community Learning Partnership in undertaking this survey highlights the difficulties in collating and analysing strategic equalities monitoring information, based on current monitoring systems. It also emphasises that at present, the Community Learning Partnership is not seen as playing a central role in collating and analysing equalities information at a strategic level. Few organisations responded to the request for information.

## 2.5 Summary

- The Community Learning Partnership leads the strategic development of CLD activity in the city.
- The principle of 'inclusion' is a priority for CLD provision in Glasgow.
- Collection of equalities data across CLD organisations is patchy and information is not often analysed and used to inform service delivery.
- The way in which CLD organisations currently gather monitoring information varies, and this makes it difficult to collate information across the city.
- At present, there is no strategic framework in place for gathering and analysing equalities information across the CLD field in Glasgow.

### 3. The law and best practice

#### 3.1 CLD and equality

The national framework for CLD activity is driven by the Scottish Executive's **Working and Learning Together** guidance. This guidance set out the three national priorities for CLD activity of:

- learning for adults;
- learning for young people; and
- building community capacity.

The guidance strongly emphasises that CLD activity should be targeted towards those individuals, groups and communities most in need of support. It states that activity should work towards 'closing the opportunity gap, achieving social justice and encouraging community regeneration' (p2).

The importance of equality is also emphasised in the **How Good Is Our Community Learning and Development (2)** guidance. This was produced by the HM Inspectorate of Education (HMIE) in Scotland. It aims to assist organisations to evaluate the quality of their CLD activities. It states that CLD organisations should:

- include excluded communities;
- address barriers to participation;
- provide access to specialist services to meet specific needs;
- promote inclusion, equality and fairness;
- promote positive attitudes to social and cultural diversity; and
- ensure compliance with equalities legislation.

This focus on equality was further emphasised by the development of guidance for CLD providers working with equalities groups. The **Same Difference?** guidance was produced by Communities Scotland in February 2007. It sets out the responsibilities of CLD providers in promoting equality. And it gives advice on issues like assessing needs, developing appropriate services and monitoring the impact of activities.



In addition, many CLD providers have legal responsibilities in relation to equalities. A range of legislation applies to different CLD organisations, including:

- the law on human rights;
- specific legislation in relation to race, disability and gender;
- community planning requirements; and
- best value requirements.

In summary, the key requirements of the law (as impacts on CLD providers) are:

- Everyone has a basic right to freedom of belief; freedom of expression; private life and family; and freedom from discrimination in accessing their human rights.
- It is unlawful for any CLD provider to discriminate for any reason relating to race, disability or gender.
- 'Public authorities' – like local authorities, health services and colleges – have a responsibility to promote equal opportunities and eliminate discrimination on the basis of race, disability and gender.
- No-one can discriminate on the basis of sexual orientation, gender, ethnic origin, gender identity, religion, belief, disability or age in the fields of employment and training.
- Local authorities have a responsibility to embed equalities in their activities, through a duty of Best Value.
- All CLD providers involved in community planning also have a duty to promote equality in their activities.

The specific requirements that the law places on CLD providers are set out in detail in the **Same Difference?** guidance. But it is clear that both the law and the policy framework for CLD emphasise how important equality is to CLD activity.

## 3.2 Equalities monitoring

### 3.2.1 Monitoring and the law

A wide variety of different organisations and agencies are involved in CLD activity. This means that the **legal requirements** in terms of equalities monitoring can be different.

There are general and specific duties set out in relation to ethnic origin, disability and gender. These duties generally apply to public services such as health services and local authorities. Further and higher education institutions are also included as public authorities. All public authorities have a general duty to:

- eliminate discrimination and harassment on the basis of ethnic origin, disability or gender; and
- promote equality of opportunity and positive attitudes.

Each public authority has a specific duty to produce a Race Equality Scheme, Disability Equality Scheme and Gender Equality Scheme. These must set out their policies and functions, and how they impact on race, disability and gender equality. They do not set a specific duty on all public authorities to monitor ethnic origin, disability and gender. But they do state that each Scheme should contain information about the impact of policies on these equalities groups. It is almost impossible to do this without undertaking equalities monitoring.

‘The general duty does not say you must monitor policy and service delivery. However, you will find it difficult to show that you have met your duty to eliminate unlawful racial discrimination and promote equal opportunities if you do not have any monitoring data’  
(CRE website, 2007)

Importantly, schools and further and higher education institutions do have a **specific duty** to monitor ethnic origin, gender and disability of students. Both admissions and progress must be monitored.

The law in relation to age, faith and sexual orientation is less developed. There are no specific duties to monitor the impact of activities on these equalities groups.

### 3.2.2 Monitoring and best practice

Even where the duty to monitor equalities information is not set out in law, all CLD organisations **should** be doing so. CLD activity is about providing the opportunity for everyone in the community to increase their skills, confidence, networks and resources. Crucially, both national and local priorities in Glasgow emphasise the importance of targeting resources at the most excluded and vulnerable communities. This means that it is essential to understand who these communities are, how they are using CLD activities, and what their needs are for the future. Without some form of equalities monitoring, it is simply not possible to do this.

‘To have an equality policy without (ethnic) monitoring is like aiming for good financial management without keeping financial records’ (CRE website, 2007)

‘How can an organisation demonstrate that it has given due regard to disability equality without an evidence base?’ (DRC guidance)

The **Same Difference?** guidance on CLD and equality emphasises the importance of monitoring as an essential part of working with equalities groups, and embedding equality into your organisation’s regular activities.

### 3.3 Best practice in equalities monitoring

A number of guidance documents have been produced which discuss how best to introduce equalities monitoring systems. This guidance tends to focus on one particular theme. For example, the Commission for Racial Equality (CRE), the Disability Rights Commission (DRC) and the Equal Opportunities Commission (EOC) have all produced guidance on monitoring.

There is less guidance available on monitoring age, faith and sexual orientation. But a number of useful resources have been developed. The guidance produced on ethnic monitoring for all equalities groups identifies a number of key themes:



- **Link monitoring to wider planning and delivery activity** – all guidance on equalities monitoring stresses that monitoring is not an end in itself. The central purpose of equalities monitoring is to assess the impact of your activities, and address inequality through action. If an organisation does not analyse and act upon the information it gathers, monitoring activity is worse than useless. It not only serves no purpose, but can reduce trust as people see that no action is taken with the equalities information they provide. It is essential that monitoring is undertaken with the aim of influencing policy, practice and service development.

'Only collect information which your organisation will use' (DRC guidance)

- **Be clear about why you are gathering monitoring information** – people who are providing personal information need to know why you need it and how it will be used. If this is not clear, they are less likely to provide it. Organisations need to make it clear that they are gathering information to improve the services and activities they offer to all communities.
- **Anonymity and confidentiality encourages higher responses** – guidance consistently emphasises that asking for personal information on an anonymous basis results in higher response rates. There is general consensus that in most cases, information should be gathered anonymously.
- **Build trust and understanding before gathering more detailed information** - there are various different levels of information that CLD organisations may want from their service users. But guidance stresses the incremental nature of establishing monitoring systems. It is important to start with gathering basic information, see what it tells you, act upon it, and then start to gather more detailed information if needed. This means that both staff and service users can build confidence in the role of the equalities monitoring system, and be sure that it is of value.

- **Think carefully about terminology and categories used** – the wording of questions about people’s personal characteristics can be troublesome. No-one likes being categorised, and finding the right words to ask about people’s characteristics is very important. The importance of wording has led to a number of organisations suggesting standard questions for equalities monitoring. These are set out in more detail below. It is also important that the questions asked can, where possible, be compared to national figures and a local baseline (if available). So, for example, the CRE stresses that ethnic monitoring information must be consistent with Census categories to allow comparison.

### 3.4 Specific advice about equalities monitoring

#### 3.4.1 Ethnic origin

The Commission for Racial Equality (CRE) website<sup>1</sup> provides general information about why ethnic monitoring is important, and how to go about it. It emphasises that ethnic monitoring in itself achieves nothing – it needs to be used to address inequalities and improve services.

The CRE identifies three guiding principles for choosing ethnic categories:

- **Ethnic data must be comparable with census output data** – extra groups can be added as sub groups to allow comparison.
- **Ethnic categories must be widely acceptable** – the way people classify themselves can change and some terms may no longer be acceptable to many. The CRE emphasises that the census question has been widely tested and received a high response rate in 2001.
- **Ethnic data must be as detailed as possible** – there are important differences between groups.

For all of these reasons, the CRE emphasise the need for ethnic monitoring categories to be consistent with the census. This is sensible, but is difficult at present because new ethnic monitoring categories are currently being developed and tested for the 2011

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<sup>1</sup> [www.cre.gov.uk/scotland](http://www.cre.gov.uk/scotland)

Census. The Scottish Executive is currently commissioning cognitive question testing of a preferred question on ethnic origin. As a result, the categories used in the census are likely to change from those used in 2001.

### 3.4.2 Disability

The Disability Rights Commission has produced advice about gathering information on disability<sup>2</sup>. Critically, the guidance focuses on the process of collecting and analysing information **to inform action**. It stresses the need to use monitoring information to inform future activity.

The guidance advocates the use of the social – rather than medical – model of disability. This means focusing on the barriers experienced by disabled people, rather than their condition. Therefore, in terms of monitoring activity, gathering information on the **type** of impairment experienced is less important than learning about the barriers experienced in accessing services.

The DRC emphasises that there is a lack of consistent information about disability in Scotland. And that there is some confusion and overlap between issues relating to health, illness and disability. As a result, the guidance suggests standard questions to use in gathering information about disability.

The **Disability Discrimination Act** considers a person disabled if:

- You have a long standing physical or mental condition or disability that has lasted or is likely to last at least 12 months, and
- This condition or disability has a substantial adverse effect on your ability to carry out normal day to day activities

**Q:** Do you consider yourself to be disabled as set out under the Disability Discrimination Act? **Yes/ No**

<sup>2</sup> Guidance on gathering and analysing evidence to inform action, DRC

This is rather a wordy question, and other guidance<sup>3</sup> has suggested that it may be easiest to simply ask:

**Q. Do you consider yourself to have a disability? Yes/ No**

This could be accompanied by a short description of the various types of disability which could be experienced – including physical impairment, sensory impairment, mental health condition, learning difficulty, cognitive impairment or long standing illness or condition like HIV or cancer.

The guidance produced by the Disability Rights Commission stresses the importance of gathering basic information initially, and then moving on (if needed) to gather detailed information about the type of disability experienced.

### **3.4.3 Gender**

The Equal Opportunities Commission (EOC) has produced guidance<sup>4</sup> on gathering information to assist in meeting the gender equality duty. Again, this guidance emphasises the need to use monitoring information as a tool to track progress in removing disadvantage.

The guidance suggests that there are four main areas where organisations may wish to monitor service users:

- sex;
- caring responsibilities;
- part time working; and
- transgender status.

Not all of this information has to be gathered through standard monitoring arrangements. Information on caring responsibilities and part time working may be better gathered through more detailed research and exploration of the issues that these factors create.

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<sup>3</sup> Monitoring Disability, Trades Union Congress, [www.tuc.org.uk](http://www.tuc.org.uk)

<sup>4</sup> Gathering and using information on gender identity, Equal Opportunities Commission, 2007

The guidance stresses that monitoring transgender issues can be very sensitive. It suggests that transgender issues should be explored for all public sector service users. But there is some debate about this. 'Press for Change' – an organisation campaigning for equality for trans people – has produced some more detailed guidance<sup>5</sup> specifically on this issue.

It states that there are 'certain pitfalls' which can be created by monitoring of transgender issues:

- It cannot be done without a clear commitment to equality across the organisation.
- There needs to be a clear purpose and good systems for storing and reporting data.
- Questions must always be optional.
- Questions should use language that people find acceptable – although different people describe themselves with different labels.
- Monitoring information should always remain anonymous – and the Gender Recognition Act 2004 prohibits disclosure of someone who has a Gender Recognition Certificate.

Most importantly, it states that monitoring should only be undertaken where there is legal protection in place for the group being monitored. It also warns against basing assumptions on the numbers gathered by any monitoring activity, as transgender issues can be significantly under reported.

'Customers should never be the subject of monitoring for trans status. Until such a time as the law changes to allow protection for goods and services for trans people, providers should not monitor their customers for trans status' (Press for Change)

Overall, the guidance states that if monitoring is undertaken it must be done anonymously and where trust has been built up. It emphasises that transgender should not simply be added as an option to questions about gender or sexual orientation.

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<sup>5</sup> Trans Equality Monitoring, Press for Change website, 2007

Instead, it suggests two standard questions:

- Q.** Is your gender identity the same as the gender you were assigned at birth?  
**Q.** Do you live and work full time in the gender role opposite to that assigned at birth?

### 3.4.4 Age

There is very little guidance available on good practice in monitoring the age of service users. With the introduction of the Employment Equality (Age) Regulations 2006, there is some guidance available on monitoring age in the workforce. ACAS has produced guidance<sup>6</sup> on age in the workplace, which includes information on monitoring. It basically states that the age bands used should be tailored to suit your organisation’s own circumstances. It suggests some standard bandings, but as these are for employers they would not be suitable for the CLD context.

It will therefore be more appropriate to look to the CLD context, and how information on age will be used, to determine standard age bandings appropriate for CLD providers in Glasgow.

### 3.4.5 Faith

Very little guidance is available on monitoring faith or belief. Even in the field of employment, there is little guidance on the approach that should be taken, or categories that should be used.

The 2001 Census categories used were:

<b>None</b>	<b>Other Christian</b>	<b>Jewish</b>
<b>Church of Scotland</b>	<b>Buddhist</b>	<b>Muslim</b>
<b>Roman Catholic</b>	<b>Hindu</b>	<b>Sikh</b>
<b>Another religion (please specify)</b>		

In line with the guidance from the CRE on ethnic monitoring, it would make sense for the same categories to be used in Glasgow to allow for comparison and consistency.

<sup>6</sup> Age and the workforce, ACAS, 2006

### 3.4.6 Sexual orientation

Stonewall – an organisation campaigning for equality for lesbian, gay, bisexual and transgender people – has produced guidance<sup>7</sup> on monitoring sexual orientation. It has been developed for employers, but contains useful lessons for monitoring service users. Importantly, it stresses that transgender issues should **not** be monitored in the same section as questions about sexual orientation (see Section 3.4.3).

The guidance sets out ten steps to sexual orientation monitoring, including:

- establish an inclusive organisational culture;
- be clear what you want to find out and why;
- get support and commitment from the top;
- guarantee confidentiality and anonymity;
- give it time and treat initial data with caution;
- take positive action to address the issues identified by monitoring; and
- treat monitoring as just one part of an equality programme.

Stonewall suggests a standard question on sexual orientation.

**Q. What is your sexual orientation?**

- Bisexual
- Gay man
- Gay woman/ lesbian
- Heterosexual/ straight
- Other
- Prefer not to say

Stonewall stresses that no inference should be made if people prefer not to provide information on their sexual orientation.

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<sup>7</sup> How to monitor sexual orientation in the workplace, Stonewall, 2006

### **3.5 Experiences elsewhere**

We have reviewed the equalities monitoring systems used in other sectors, and in other parts of the UK. We identified a number of interesting approaches. A short summary of each approach is included below.

#### **3.5.1 Example: encouraging people to fill in ethnic monitoring forms**

Hackney Community College wanted to encourage more students to complete the voluntary ethnic monitoring section of enrolment forms. In 2003, almost one third of students did not declare their ethnic origin on the form. To encourage students to complete the form the college produced leaflets explaining:

- what information was needed and why;
- how it would be used; and
- how the use of such information would benefit the students.

Training was also provided to staff on how to ask questions on ethnicity and other personal information. By 2005, the number of students declaring their ethnicity had increased by 20 per cent.

#### **3.5.2 Example: openness and accountability improve community relations**

Avon and Somerset Constabulary wanted to ensure that people knew exactly why equalities information was being gathered, and how it was being used. It set out arrangements for:

- publishing the results of equalities monitoring information; and
- publishing impact assessments and consultations on equalities issues.

The aim was to increase openness and accountability and improve relations with local communities. The organisation also outlined how it would increase public awareness and accountability for its race equality work. This served to improve relations with ethnic minority communities and increased confidence in the police force as a whole.

### **3.5.3 Example: expanding equalities monitoring categories**

Glasgow University currently monitors service use consistently in terms of gender, ethnic origin and disability. Diversity Working Groups have been established to manage the university's approach to equality. These groups receive regular reports on service use by equalities group. These reports include analysis of key gaps and barriers, and recommendations for future action.

The university is beginning to expand the equalities monitoring information gathered. This is happening gradually. For example, a recent attitude survey included a question on sexual orientation and transgender status. As the response to this question was positive, the university is considering including this question as standard in the future.

### **3.5.4 Example: detailed equal opportunities monitoring pilot**

Lothian and Borders police are the first force in the UK to pilot a self-classification, diversity monitoring programme for staff and service users. Monitoring systems gather information on:

- ethnic origin;
- religion;
- sexual orientation;
- transgender status;
- disability;
- gender; and
- age.

All staff are encouraged to complete a self classifying survey. In addition, service users are asked questions on all seven issues whenever a customer survey is carried out. This type of monitoring is the first of its kind policing in the UK.

Before the introduction of the monitoring system, there was some concern about the wide range of personal information being gathered from staff and service users. But in reality, the scheme has been very successful. The monitoring process has allowed Lothian and Borders police to gain a greater understanding of the diversity of its



workforce and services users. It ensures that the organisation's Equal Opportunity Policy is transparent, and based on the needs and experiences of staff and service users. It also allows the force to support staff in an appropriate way.

The monitoring system was developed in close consultation with equalities groups and other key partners – including City of Edinburgh Council and NHS Lothian. The introduction of new monitoring systems was accompanied by diversity awareness training for all staff.

### 3.6 Summary

- The national framework for CLD activity is driven by the Scottish Executive's 'Working and Learning Together' guidance.
- The guidance strongly emphasises that CLD activity should be targeted towards those individuals, groups and communities most in need of support.
- Additional guidance – How Good is Our CLD and Same Difference? guidance on equalities – stresses importance of CLD activity with equalities groups.
- Some organisations – mainly public bodies – have legal responsibilities in promoting equality in terms of race, disability and gender equality, and it is difficult to fulfil these duties without undertaking equalities monitoring.
- Equality is central to CLD – so even if organisations are not covered by the law, it is vital to understand the profile of the community and service users.
- Best practice in equalities monitoring consistently stresses that:
  - monitoring must be linked to action, and real changes to address and inequalities identified;
  - it is essential to explain why you are gathering information and how it will be used;
  - anonymity and confidentiality clearly increase response rates;
  - trust and understanding is needed before gathering more detailed or sensitive information; and
  - it is important to think very carefully about the terminology used.
- Some equalities bodies/ organisations have suggested standard questions to ensure consistency and appropriateness of language.

## 4. Views of key stakeholders

### 4.1 Introduction

We spoke to a sample of CLD organisations and equalities groups in order to gather opinions on:

- current equalities monitoring systems;
- potential for a joint approach to monitoring; and
- views on equalities standards for CLD providers in Glasgow.

The views of consultees are summarised below. A full list of those consulted is included as Appendix One.

### 4.2 Current information gathering

The equalities monitoring information currently gathered by CLD providers varied significantly. Colleges and universities tended to have the most comprehensive equalities monitoring systems in place. Specific duties are placed on these organisations in terms of monitoring ethnic origin, disability and gender of service users – both at point of access and in terms of learning outcomes. Generally, colleges and universities felt that they were doing well in meeting these duties.

For all CLD providers, monitoring of age and gender was by far the most common. Most organisations gathered information in these fields. Some were monitoring ethnic origin and disability, but very few monitored sexual orientation, faith or transgender status. This reflects the findings of the original scoping study.

Where equalities monitoring was undertaken, it was mainly in relation to **access** and use of services. Only a small number of organisations monitored satisfaction and feedback by different equalities groups. Very few monitored CLD outcomes by equalities group. But a minority of organisations did have sophisticated tracking systems in place to measure access, impact and outcome by equalities strands.

A minority of organisations were confident that monitoring was used to inform service delivery. In general, very little was done with the information that was gathered. But, there were exceptions to this. A small number of organisations highlighted that they were dedicated to linking equalities monitoring to service delivery, and that information was analysed and acted upon on a regular basis.

'The temptation is to collect the information then put it away in a cupboard'  
(CLD provider)

Finally, some larger organisations mentioned some inconsistencies in equalities monitoring systems. For example, in some cases some staff were aware of the equalities monitoring systems that were in place, while others weren't. Others mentioned that in some cases information was gathered in different ways at different times.

### 4.3 Views on joint monitoring

There was general consensus that it would be useful to have a basic, standard system for equalities monitoring for CLD providers in Glasgow. It would provide a useful overview of how the needs of equalities groups are being met across the city. But consultees agreed that there were a number of key principles that should be taken into account when developing the system.

- **Keep it simple** – the main message emerging was that the system should provide a basic, minimum standard for equalities monitoring, which organisations could adapt to their own circumstances. The importance of keeping the system simple, and not requiring additional information collection, was stressed repeatedly by consultees. Many suggested the concept of a basic standard system, with guidance on how to tackle some of the more complex issues, if desired. This included issues such as sexual orientation and transgender monitoring.

'The key to ensuring widespread participation of CLD providers will be not to overburden them' (CLD provider)

- **Be clear about why information is being gathered** – everyone felt that all information gathered should have a purpose, and be fed into service delivery.

‘There should be a clear reason for asking every question’ (CLD provider)

- **Be flexible** – many organisations mentioned that they had their own IT systems which enabled them to store, analyse and update equalities monitoring information in their own way. They stressed that the system should allow for flexibility in the way in which information is stored and analysed.

‘It shouldn’t be an extra layer of monitoring. It’s about standardisation, not more gathering of information’ (CLD provider)

- **Ensure commitment and leadership** – some consultees emphasised the need for top level commitment to gathering equalities information, and acting on it, to ensure credibility of the system. One respondent wondered whether the Community Learning Partnership had the authority and ability to take on a leadership role.

‘It needs to lead to an improvement in service delivery’ (CLD provider)

- **Ability to share information** – a number of individuals mentioned the need to be aware of data protection issues, and consider how to ensure that information can be shared within the Community Learning Partnership. But properly anonymised information should not cause any data protection issues. One consultee felt that information on equalities monitoring should be published jointly, along with a commitment to take action.

‘We need to improve our understanding of how to use the information effectively’  
(CLD provider)

#### 4.4 Views on equalities standards and guidance

We also asked CLD providers if they would welcome the development of consistent standards for equality. Very few people felt that there was a need for further standards or guidance, and they mentioned the range of resources used already:

- How Good is Our Community Learning and Development?
- Same Difference?
- Internal teams and equality officers – within larger organisations like the NHS and Glasgow City Council.

The main area where organisations mentioned that they would like detailed guidance is in using equalities monitoring information effectively. Organisations mentioned that they would welcome assistance with:

- introducing monitoring on LGBT and faith related issues;
- awareness raising training for people using equalities monitoring forms;
- profiling customers and comparing with wider community profiles;
- using information to improve equalities activity through setting targets and taking action to address inequality and disadvantage;
- interpreting and using existing guidance on equalities issues; and
- working with equalities groups in practice.

Overall, organisations felt that it would be useful to have support in assessing their performance in line with the range of guidance and best practice information that is already available.

#### 4.5 Links with other monitoring frameworks

We consulted with a range of funding organisations about the linkages between the equalities monitoring information they require, and that proposed in the system for CLD providers. It is essential to ensure some consistency, to avoid organisations having to provide information in different formats to different organisations.

Glasgow Community Planning Partnership is a considerable funder of organisations across the city. They have recently introduced a Single Monitoring Framework for all organisations funded by the CPP. All funded activities from 2007/08 onwards will be required to gather the equalities monitoring information set out within the Single Monitoring Framework.

The equalities information gathered focuses on four areas:

- age;
- gender;
- disability; and
- ethnic origin.

The CPP considered that at this stage it was not appropriate to gather information on sexual orientation, transgender status and religion or belief. Projects will be required to provide the information to the CPP twice a year.

The way in which the questions are worded, and the categories that are used, is slightly different than the proposed framework for CLD providers. There are three main differences. Firstly, the categories for ethnic origin are very slightly different from the 2001 Census. There does not appear to be a clear reason for this.

Secondly, the CPP question on disability asks for information on the type of impairment experienced. National guidance, and advice from CLD providers in Glasgow, steered us away from asking this type of question.

Finally, the age bands used within the CPP form are slightly different to those used in the proposed form for CLD providers. The age bands used by the CPP were considered by CLD organisations, but were seen as not appropriate to their client group.

There is a need to resolve some of these issues to ensure that there is as much consistency as possible between the two forms. We believe that it would be very easy for the CPP and CLP to agree to using the 2001 Census categories for ethnic origin. With regard to disability, it may be possible to agree that all organisations must gather basic information about whether service users are disabled or not. But more detailed information should be provided only if this is gathered by the organisation concerned.

The age band categories would require more detailed negotiation and discussion. CLD providers were very clear about the age bands that would suit their activities – in terms of the way funding streams are targeted, for example. Creating consistency in the age bands used may be a longer term objective.

The draft equalities monitoring framework was also considered by Communities Scotland and the Big Lottery. (Currently awaiting a response)

#### 4.6 Consultation on draft pack

In May 2007, we held a session with equalities groups and CLD providers in Glasgow to discuss and gain feedback on our draft pack on CLD and equality. This session was very well attended – 22 people came to the event. We discussed views on the draft equalities monitoring forms, and the self assessment framework. A number of key themes emerged:

- **Terminology** – there was a healthy debate about the words and phrases used to ask people about their characteristics. Those present recognised that everyone has different preferences about how they are described, and that people don't fall neatly into boxes. As a result, getting the wording right can be very challenging. With a very experienced range of equalities groups and CLD providers present, we managed to jointly agree a broad approach to phrasing each of the questions.

- **Appropriateness of asking questions** – attendees felt that for different organisations, there were different issues about whether questions were appropriate or not. For example, some felt that certain questions would be better asked once a relationship had been built up with the service user. Others questioned the value of asking them at all, in their organisation. We agreed that there would need to be flexibility, so that organisations can identify the most appropriate way to use the equalities monitoring forms to suit their circumstances.
- **Need for consistency** – all of those present emphasised the need to create linkages with the Community Planning Partnership. It was agreed that the Community Learning Partnership should liaise with the Community Planning Partnership to create similarities between the two systems.
- **Support for the concept** – broadly, attendees felt that both the equalities monitoring system and self assessment framework were helpful additions to the CLD context in Glasgow. But, they emphasised that people attending the event were those who were already the most committed and interested in equalities. There is a need to ensure that the equalities pack is well promoted to all CLD providers in Glasgow.

## 4.7 Summary

- Current arrangements for equalities monitoring varied significantly between the organisations consulted.
- Some organisations had sophisticated tracking systems in place for monitoring a range of equalities themes.
- Very few organisations monitored sexual orientation, faith and transgender status – and they sought more guidance on how this should be done.
- A minority of organisations used monitoring to inform service delivery.
- There was general consensus that it would be useful to have a standard system for equalities monitoring.
- A number of key principles for the development of a standard system were suggested – simplicity, clarity, flexibility, commitment and joint working.
- People generally felt that there was adequate guidance available to support equalities work, but a number of gaps were mentioned:
  - support in implementing monitoring systems and using them to identify and address inequalities;
  - support in interpreting and using existing guidance;
  - standards for working with equalities groups in practice.
- There was some demand for support in assessing performance in relation to existing guidance and best practice information.

## 5. Key findings and recommendations

### 5.1 Key findings

- Collection of equalities data across CLD organisations is patchy and information is not often analysed and used to inform service delivery.
- The way in which CLD organisations currently gather monitoring information varies, and this makes it difficult to collate information across the city.
- At present, there is no strategic framework in place for gathering and analysing equalities information across the CLD field in Glasgow.
- Best practice in equalities monitoring consistently stresses that:
  - monitoring must be linked to action, and real changes to address and inequalities identified;
  - it is essential to explain why you gather information and how it will be used;
  - anonymity and confidentiality clearly increase response rates;
  - trust and understanding is needed before gathering more detailed or sensitive information; and
  - it is important to think very carefully about the terminology used.
- Some equalities bodies/ organisations have suggested standard questions to ensure consistency and appropriateness of language..
- Current arrangements for equalities monitoring in Glasgow varied significantly between the organisations consulted and a minority used monitoring to inform service delivery.
- There was general consensus that it would be useful to have a standard system for equalities monitoring.
- A number of key principles for the development of a standard system were suggested – simplicity, clarity, flexibility, commitment and joint working.
- People generally felt that there was adequate guidance available to support equalities work, but a number of gaps were mentioned:
  - support in implementing monitoring systems and using them to identify and address inequalities;
  - support in interpreting and using existing guidance;
  - standards for working with equalities groups in practice.

## 5.2 Recommendations

- A basic joint equalities monitoring system should be established for CLD providers across Glasgow.
- This system should provide a standard framework which could be used by CLD providers to monitor equalities issues.
- The basic system should include only essential equalities monitoring information which is required by law and best practice.
- This basic information should be collated centrally by the Community Learning Partnership on an annual basis.
- The Community Learning Partnership should liaise with the Community Planning Partnership to ensure consistency in equalities monitoring systems.
- The Community Learning Partnership should lead on city wide analysis of this information, drawing out key issues, publishing summary information and feeding findings into the strategic CLD planning process.
- It is essential that this process of feeding information into service planning occurs, to ensure credibility of the system and encourage participation by both CLD organisations and service users.
- The monitoring system should also include guidance on how to tackle more detailed equalities monitoring – in particular in the fields of sexual orientation and transgender issues.
- The system should be accompanied by detailed advice about monitoring, including:
  - why monitoring is important;
  - how to gather information;
  - how to analyse information;
  - how to use the information to inform service delivery; and
  - building trust to ensure monitoring is effective.
- Advice should also be provided on the range of guidance available on equalities work, and a simple self assessment framework for equalities activity should be provided.

**Appendix One**  
**List of Consultees**

<b>Name</b>	<b>Title</b>	<b>Organisation</b>
Norma Greenwood	Programme Manager, Public Health Resource Unit	NHS Greater Glasgow and Clyde
Anne Dunbar	Learning and Development Co-ordinator, Public Health Resource Unit	NHS Greater Glasgow and Clyde
Catriona Carson	Learning Advisor – Literacy and Numeracy, Public Health Resource Unit	NHS Greater Glasgow and Clyde
Debbie Thompson	Skills Development Co-ordinator, Public Health Resource Unit	NHS Greater Glasgow and Clyde
Nicola Graham	Development Manager	Glasgow Community Planning Ltd.
Aileen Brown	Development Officer	Glasgow Community Planning Ltd.
Elaine Rodger	Training Manager	Glasgow Chamber of Commerce
Roberta Downes	Community Learning and Literacy Co-ordinator	Glasgow Council for Voluntary Service
Lorraine McLaren	Wider Access Manager	Glasgow Housing Association
Helen Jackson	Programme Co-ordinator	Glasgow Housing Association
Ric Rea	Policy Officer	Glasgow Anti Racist Alliance
Najmah Chaudry	Policy Officer	Glasgow Anti Racist Alliance
Frances Thom	Academic Head for CLD	Langside College
Marlene McGlynn	All Age Guidance Manager	Careers Scotland
Caroline King	Senior Executive – Equality	Careers Scotland
Lynne Gostick	Team Leader	Careers Scotland
Alan Dickson	Policy Development Officer	Glasgow City Council
Jim Pauley	Culture & Sport Glasgow	Glasgow City Council
Colleen Willoughby	Culture & Sport Glasgow	Glasgow City Council
Dawn Corbett	Head of Corporate Policy	Glasgow City Council
Alan Inglis	Assistant Principal	John Wheatley College
Fiona Andrews	Director of Recruitment, Admissions and Participation	Glasgow University
Naseem Anwar	Equality & Diversity Director	Glasgow University
Tressa Burke	Director	Glasgow Disability Alliance
Sheila Brodie	Co-ordinator	LGBT Forum
Harriette Campbell	Co-ordinator	Glasgow Women's Voluntary Sector Network
Karen Willey	Manager	Glasgow Equalities Partnership
Joyce Connon	Scottish Association Secretary	Workers Education Association
Kirstine Simpson	Senior Administration Officer	Workers Education Association
Jane Duffy	Construction Team	Scottish Enterprise