Barriers to employers in developing lesbian, gay, bisexual and transgender-friendly workplaces

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Background

Lesbians, gay men and bisexual and transgender people (LGB and T) experience discrimination and harassment in the workplace. To tackle this, employers need to make their workplace more 'LGB and T-friendly'. The concentration on 'friendly' is to highlight the importance of going beyond anti-discrimination and harassment policies and create a culture that enables people to be open about their sexual orientation and gender identity.

The study aimed to identify how to facilitate employers to make their workplaces more LGB and T-friendly. As such, it focussed on facilitators (including business benefits) and barriers to employer action, rather than on LGB and T-friendly policies and practices. It lists specialist organisations providing support for employers to make their workplaces more LGB and T-friendly.

The study was based on qualitative interviews with 27 employers at differing stages of developing LGB and T policies and practices; interviews with seven LGB and T and stakeholder organisations; a brief literature review of business benefits of LGB and T policies and practices research; and a websearch to identify specialist providers of employer support for developing LGB and T policies and practices. The fieldwork took place in Spring 2010.

Research findings

Motivators and barriers to employers creating LGB-friendly workplaces

Employers' reasons for initiating LGB equality policies and practices included:

- to improve equality and diversity across equality strands generally;
- to improve provision to lesbian and gay customers and service users;
- to ensure legal and statutory responsibilities were met;
- to secure business benefits; and
- to be seen as a champion in the area of equality, including sexual orientation.

LGB employee networks and a senior manager with a strong commitment to equality were also major drivers for improvement.

The main barriers to LGB action identified were:

- employers' own nervousness about the issue;

- inertia;

- belief that no action was necessary as the organisation was already fair;

- lack of knowledge about what to do;

- anticipated objections from employees (these were sometimes realised); and

- prioritising other equality strands, since these were seen as more cost-effective (although LGB actions were not seen as costly).

Employee objections sometimes increased as policies developed. Male-dominated environments seemed most problematic.

Barriers can be overcome by having clear organisational commitment, support at senior level, having an active LGB network and making a clear business case to employees for action on sexual orientation. There is a need to regularly review and restate policies. Barriers were hardest to overcome in peripheral sites and in relation to monitoring of sexual orientation.

Motivators and barriers to employers creating transgender-friendly workplaces

The main motivator to transgender action was having an employee transitioning. However, this could result in action to assist the individual, rather than making the workplace more trans-friendly generally.

The main barrier was lack of recognition of the issue in general and as a workplace issue, in particular. Once transgender issues were thought about at all, the remaining barriers were:

- a lack of perceived need (due to the small size of the trans population and lack of any recognised trans employees);

- lack of knowledge of gender identity issues, legal requirements and appropriate actions; and

- hostility and fear towards transgender people generally, both from management and staff.

Only case study employers with a high commitment to equality and diversity had taken action other than due to an employee transitioning. They were prompted by:

- reviews, benchmarking or development of equality and diversity policies covering other equality strands, especially LGB;

- pressure from interested individuals (LGB network, diversity champions and transgender groups);

- legislation on gender reassignment; and

- recognition of the trans community as customers, service users and facilitators of the employers' business.

Business benefits of LGB and T-friendly workplaces

There is a lack of research evidence on the actual business benefits of having a LGB and T-friendly workplaces.

For LGB, perceived benefits are:

- human resourcing: easier recruitment; improved morale, commitment, motivation, reduced stress, reduced absence/sickness, better employee relations, higher retention and, ultimately, increased efficiency, productivity and customer service;

- business/service/finance: tapping in to the 'pink pound'; improved service provision to the LGB community; meeting customers' procurement and funding equality requirements; and

- avoidance of tribunal costs and damage to reputation.

The size of the trans population limits the potential for realising business benefits. The main benefits are likely to relate to the morale of an existing trans employee and those working around that employee: improving morale, commitment, retention and hence productivity. Otherwise, benefits might be reaped by organisations with a need of transgender expertise for their products or services and to avoid litigation costs. Large employers with extensive skill shortages, might see also small recruitment benefits.

There is a lack of evidence of the costs of making workplaces more LGB and T-friendly. Case study employer respondents reported costs as low. General policy development and implementation costs, which were part of general equality budgets were given little consideration. At the same time, limited staff resources affected the work undertaken. Respondents were more aware of external expenditure (payments for LGB and T organisation membership, donations, additional recruitment advertising, external training and consultancy). Internal costs included training, network support, costs of treating civil partnerships equally with marriage (LGB), sick leave (for medical treatment) (trans) and washing facilities (trans).

Case study employers, LGB and T organisations and other stakeholders which had taken action believed that the business benefits outweighed the costs. However, there is too little robust evidence on either costs or benefits to be able to demonstrate this. Despite believing there were net benefits, resource constraints resulted in LGB action taking second (or lower) place to other equality strands.

Support for employers

The picture of support for employers wishing to make their organisations more LGB and T-friendly is mixed. Documentation, consultancy and employer LGB networks all exist, but are limited, particularly for trans. Larger employers appear to be better served.

Support seems to be provided mainly by non-commercial organisations (although this impression might have been due to the study method). It is dominated by Stonewall for LGB and a small number of small organisations for trans. Government organisations seem to provide little of the detailed human resource information or consultancy support.

This pattern may lead to difficulties accessing consultancy support for some employers, particularly, for LGB, for those who prefer a different approach to Stonewall's and for smaller employers. Expanding provision might be useful. Improving accessibility and relevance for smaller employers is particularly important. Minimising the cost of support is important and provision through the public and third sector seems attractive to employers.

Government action: employers' and stakeholders' views

Government was seen by the case study employers and stakeholders to have taken beneficial actions in respect of LGB.

The problems encountered in the workplace were seen to stem from wider attitudes towards LGB and T. Government action to tackle prejudice and to improve understanding, especially for trans, was seen as important. Tackling trans hostility in the media was seen as very useful.

Other suggestions from the case study employers and the stakeholders for taking the agenda further included: better enforcement of legislation; increased publicity about legislation and good practice, in order to encourage employers to do more; improved access to information including providing a single point of contact and repository for information; assistance to establish networks

Support appeared to be most needed by small employers and the private sector.

Conclusions

LGB and trans differ

LGB and trans are separate issues, policies and practices differ and stem from different motivations, the potential for business benefits differ, legal issues differ. For these reasons alone, it would be better if sexual orientation and gender identity were not treated as a single issue in respect of employment policies and practices. This is all the more important because combining the two issues seems to result in gender identity often being overlooked.

Transgender

Transgender as a workplace issue is overlooked, seen as irrelevant (unless an employee is transitioning) and little understood. In general, there is substantial ignorance about transgender and hostility towards transgender people. Despite good employer support being provided by transgender organisations, employers can be at a loss on how to proceed.

Much needs to be improved if workplaces are to become trans-friendly and much needs to change outside the workplace. This includes greater education and information of society as a whole to reduce ignorance and to reduce hostility. Increased publicity about rights, legislation and good practice would also help. In the workplace itself, the aim should be to develop proactive

policies and practices, so that those with gender identity issues feel more confident about raising the issue.

LGB

To drive forward LGB actions, it is important to develop organisational commitment at a senior level to progress and to make a clear case to employees for action on sexual orientation. LGB networks can also be important in driving action. It is important to view action as a continuous exercise, otherwise workplaces are likely to regress.

Government might encourage further employer action through stronger enforcement of legislation, helping employers to recognise the business benefits of action and assisting the establishment of networks. Creating parity across the equality strands, including through ensuring the public sector implements the public duty equally across the equality strands, would further encourage employers to ensure their workplace is LGB-friendly.

Business benefits can motivate employers to take action, but there is little robust evidence of the business benefits. However, the difficulties of providing robust, convincing evidence should not be underestimated. Raising awareness of potential benefits, so that employers can consider what is relevant for their own business, may be all that is necessary. Case study examples might be helpful.

Employer support

There is a need for further employer support to help make workplaces more LGB and T-friendly, even for larger employers. Monitoring and establishing LGB and T networks were areas highlighted where greater support was sought. Assistance needs to be highly detailed. Employers seem to appreciate case studies illustrating policies and practices.

Current, non-commercial, provision is fairly limited[1] and dominated by a small number of organisations and some expansion might be helpful. Employers seemed to focus on costs and, for this reason, provision by the state and the third sector may be preferable.

An expansion of employer networks to reach more employers would be useful.

Smaller employers may be less well served, in their access to support and to networks. Consideration of how to stimulate support for smaller employers would be useful.

Variations with organisation characteristics

Employer characteristics affect the development of LGB and T-friendly workplaces and employer support needs: large employers and the public sector might be more advanced. Multi-site organisations seem to face greater difficulties in implementation and hence greater costs. Male-dominated, or perhaps, male blue-collar dominated workplaces seem to be more resistant to

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[1] The study did not examine commercial provision.

effective LGB and T action. However, small public sector organisations seemed to suffer as much as other small employers from lack of expertise and resources and seemed as much in need of support.

The difference in the propensity of employers to take action, needs to be considered in the development of government policy. Basing policy on needs requirements suggests that actions should be targeted at the types of employers which are less likely to take action. However, greater progress might be achieved amongst the type of employers which are more likely to take action.

Wider action

The reason that action needs to be taken to make workplaces more LGB and T-friendly is that there is homophobia and hostility towards trans people in society at large. Government action to tackle prejudice more widely and to improve understanding, especially for trans, is important. Tackling trans hostility in the media would be very useful.

Recommendations

The report makes a range of recommendations. The most important are:

- sexual orientation and gender identity should be treated separately in all areas of equality policy and employers should be encouraged to treat the two separately;

- for transgender:
    - action to reduce hostile publicity is required, as is publicity to reduce ignorance and create greater acceptance;

- for LGB:
    - a campaign to promote action, presenting business arguments and sources of information and assistance;
    - the provision of low cost advice and consultancy for smaller employers;
    - creating parity across the equality strands, including ensuring the public sector implements the public duty equally across the equality strands; and
    - publicity about the effect on morale, commitment and related areas such as teamworking of LGB employees not being able to be themselves at work would be useful;

- for LGB and T:
    - promotion of employer networks on transgender and on sexual orientation;
    - increased good practice guidance on transgender and on sexual orientation; and

o better signposting of available information and assistance on government websites for transgender and for sexual orientation.

There may be scope for encouraging employer organisations and professional bodies to provide more support and to raise awareness of the need for workplaces to be more LGB and T-friendly.

1   Introduction

1.1   Background

Lesbians, gay men and bisexual and transgender people (LGB and T) experience discrimination and harassment in the workplace. To tackle this, employers need to make their workplace more 'LGB and T-friendly'. The concentration on 'friendly' is to highlight the importance of going beyond narrow anti-discrimination and harassment policies and create a culture that enables people to be open about their sexual orientation and gender identity. Parallels may be drawn with changes to make workplaces family-friendly, where cultures and policies needed to change to reduce indirect discrimination against people with dependent responsibilities.

For LGB and T people, a major issue is about being able to be one's self at work and not feeling the need to hide or ignore one's sexual orientation or gender identity. This is important not only for the individual, but for the organisation and for the economy as a whole. Hiding a major aspect of one's self and one's life causes stress and reduces the quality of interaction with colleagues. These affect work performance. Workplaces which are LGB and T-friendly take away these pressures.

The study focuses on two groups which are subject to discrimination and harassment at work: lesbians, gay men and bisexual people; and transgender people. As with all discriminated against groups, there are communalities in discrimination and harassment, but there are also differences.

Historically, both groups have suffered discrimination, harassment and legal penalties. Legislation to support equal treatment of lesbian, gay, bisexual and transgender people is relatively recent. Discrimination at work for transgender people was made unlawful (in some circumstances) in 1999[2]; it was made unlawful on the basis of sexual orientation in 2003[3].

Although homophobia has arguably been decreasing, people continue to be attacked and harassed because of their sexual orientation and many lesbians, gay men and bisexual people hide their sexual orientation. Transgender people experience similar treatment. However, there has not seemingly been a similar growth in the acceptance of transgender or acknowledgment of its existence. The issue has a much lower profile and remains little understood.

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[2] Sex Discrimination (Gender Reassignment) Regulations 1999. Protection was limited to those who intended to undergo, who were undergoing or had undergone gender reassignment and this had to be under medical supervision. (Later legislation dropped the requirement for medical supervision.)

[3] Employment Equality (Sexual Orientation) Regulations 2003.

LGB and T-specific factors contribute to the lack of action on making workplaces LGB and T-friendly. There is a lack of recognition that sexual orientation and transgender are workplace issues. The reasons for this are discussed in detail in chapters 3 and 4, but it is worthwhile highlighting three factors here. Firstly, there is a lack of recognition of the performance effects of disguising one's sexual orientation and gender identity. Secondly, sexual orientation is seen narrowly in terms of sexual behaviour and relevant to the bedroom, not the workplace. Thirdly, the LGB and T workforce lacks visibility.

The latter stems from the degree to which sexual orientation and gender identity issues are hidden, as well as, for transgender, the size of the population. Concealment means that some employers believe making workplaces more LGB and T-friendly is irrelevant for them. For transgender, visibility is also reduced by the way in which transgender people identify themselves: a person who has transitioned may identify wholly as a member of the gender to which they have transitioned and not as transgender at all[4]. The size of the transgender population further diminishes visibility. Estimates suggest that around 0.2 per cent of adults (or 10,000 people) are transsexual and about 0.6 per cent (or 300,000 people) experience some degree of gender variance (Reed *et al.*, 2009)[5]. For LG and B population size is less of an issue as the LGB population is larger, generally thought to be that around five to seven per cent of the population (Stonewall, 2011). However, a recent ONS survey put the figure at 1.5 per cent of the adult population (or 725,000 in the UK) (ONS, 2010a)[6].

Lack of visibility contributes to a vicious circle: the workplace appears LGB and T unfriendly and so LGB and T employees hide their sexual orientation and gender identity; the employer believes they have no LGB and T employees and so there is no need to make their workplace LGB and T-friendly.

Finally, transgender is most strongly brought to an employer's attention and most strongly requires action when an employee transitions. This leads to a focus on transitioning. However, not every trans employee will be transitioning and other issues both pre- and post-transition need to be addressed to make workplaces trans-friendly.

1.1.1 Terminology

A number of terms with which the reader may be unfamiliar are used in connection with transgender. The following definitions given by the Gender Trust[7] may be helpful.

Gender Identity The gender to which one feels one belongs.

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[4] Legal protections also mean that identifying the person as transgender can be unlawful.
[5] The size varies depending on the population measured e.g. transsexual, transgender, those with gender identity issues.
[6] The size varies with the definition of sexual orientation and with the method of data collection. The ONS estimate was widely disputed at the time. The ONS explained the low figure due to measuring '*self perceived sexual identity rather than looking to measure the wider concept of sexual orientation or their sexual preference and behaviours'* (ONS 2010b).
[7] http://www.gendertrust.org.uk/faq/glossary/

Transgender An umbrella term used to include transsexual people, transvestites and cross-dressers, as in "the transgender community."

Transsexual Person A person who feels a consistent and overwhelming desire to transition and fulfill their life as a member of the opposite gender. Most transsexual people actively desire and complete gender reassignment surgery.

Transgender Person A person who, like a transsexual person, transitions (sometimes with the help of hormone therapy and/or cosmetic surgery) to live in the gender role of choice, but has not undergone, and generally does not intend to undergo genital surgery.

Transition The social, psychological, emotional and economic processes that a trans person undergoes to move from their assigned gender role into their chosen or acquired gender. It may or may not involve surgery.

1.2 Aims and objectives of the study

The key aims of the study were to:

- identify the barriers faced by employers to ensuring their workplaces are lesbian, gay, bisexual and transgender-(LGB and T-) friendly; and

- identify the role of the Government Equalities Office (GEO), government departments and government agencies in supporting employers develop LGB and T-friendly workplaces.

The study was to address these issues for employers at different stages of becoming LGB and T-friendly (from employers which had taken no LGB and T actions to employers with a long-standing range of actions).

Within these aims, the study had a number of objectives:

1. a) to identify the support available to employers to help develop more LGB and T-friendly workplaces and identify gaps in this provision;

   b) to identify the evidence on employer and wider benefits of LGB and T-friendly workplaces;

2. to identify barriers to employers developing LGB and T-friendly workplaces;

3. to identify whether problems anticipated by employers are realised and how they may be overcome;

4. a) to identify the roles and responsibilities of government departments and agencies in supporting employers to develop LGB and T-friendly workplaces, taking into account the extent to which employers feel government departments and agencies can and should play a role;

   b) to identify existing frameworks or programmes through which the GEO, government agencies and government departments can support employers develop LGB and T-friendly workplaces; and

5. to produce recommendations on how government departments and government agencies might support employers to overcome specific barriers

1.3 Method

The study was based on

- a literature review;

- a web search for providers of support to employers;

- interviews with LGB and T and other stakeholder organisations; and

- case studies of employers.

1.3.1 The literature review

The literature review sought evidence on the business benefits of employer action to make workplaces more LGB and T-friendly. The review was designed to be very brief as little research had been conducted on LGB and T-specific business benefits.

The review drew on previous research by the researchers, a search of the websites of the major transgender and sexual orientation organisations which provided support to employers, other organisations with a strong interest in equality (e.g. EHRC, ACAS) and an internet search (using terms such as 'business benefits', 'sexual orientation' and 'transgender').

The review identified benefits which were believed to stem from being LGB and T-friendly, but little evidence of whether business benefits were actually achieved[8].

1.3.2 The web search of support

The web search aimed to identify support to employers to help them make their workplaces more LGB or T-friendly. (Commercial consultancies and providers of legal assistance only were excluded, as these tend to be generalist, rather than LGB and T-specific.) Data on the type of assistance provided was gathered and, where web information was inadequate, further information was gathered by telephone.

1.3.3 Stakeholder organisations

Discussions were held with LGB and T and other stakeholder organisations to explore:

- the barriers they perceive employers have in developing LGB and T-friendly workplaces (and the basis for their perceptions);

- evidence and views on business benefits;

- support provision;

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[8] This is not to suggest that the expected benefits do not exist.

- what they think would assist employers to develop a LGB and T-friendly workplace, including support required; and

- the role of government departments and agencies in providing further support.

(See Appendix 1 for the discussion guide.)

Suggestions were also sought from the stakeholder organisations on potential employer case studies.

Participating organisations were:

- organisations supporting and campaigning for LGB and/or T:
    - Stonewall;
    - The Gender Trust;
    - Press for Change;

- trade union organisations:
    - the Trades Union Congress (TUC);

- organisations with a wider remit, but likely to have specialist knowledge:
    - Advisory, Conciliation and Arbitration Service (ACAS);
    - Chartered Institute of Personnel and Development (CIPD);
    - Federation of Small Businesses (FSB).

In addition, the British Chambers of Commerce was contacted, but did not provide LGB and T specific assistance and so was excluded from the sample.

1.3.4 *Case study employers*

The aim was to interview between 20 and 25 employers. Twenty-seven employers were actually interviewed. The interviews with case studies aimed to identify:

- motivators and barriers to starting to take action to make their workplace more LGB and T-friendly;

- barriers to later action;

- business benefits; and

- support needs[9].

The study did not aim to identify the LGB and T actions which had been taken (other than to the extent this was necessary to meet the other aims). (See Appendix 2 for the discussion guide.)

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[9] The identification of LGB support needs through the case studies was somewhat hampered by our sampling method. Twenty-one of the case studies were Stonewall Diversity Champions and so received support from Stonewall. Of the six other case studies, two were doing nothing in relation to LGB (and so did not perceive any support needs) and two were doing little.

Respondents were senior members of staff with responsibility for equalities policies.

Interviews averaged an hour and were recorded and transcribed.

The sample was selected to provide a range across the following characteristics:

- public, private and third sector;

- manufacturing and services;

- employment size; and

- work undertaken in respect of LGB and T (from no action, through just beginning to develop policies and practices to having long-standing policies and practices).

In order to ensure inclusion of employers at different stages in development of LGB and T policies and practices, the sample was identified with the assistance of LGB and T and other stakeholder organisations. Stonewall, the Gender Trust and Press for Change were helpful in suggesting employers and providing contacts for those which had taken varying amounts of LGB and T action. Those which had not taken action were identified by ourselves.

1.3.5   Limitations of the method

The need to include employers at various stages of LGB and T policy development meant that the sample was largely of employers which had received support from Stonewall or the Gender Trust and, largely, the former. This was both beneficial and detrimental for our investigation of the adequacy of support. It meant we were able to explore with many of the case studies the support they had received from Stonewall. We were less able to explore adequacy of support with those which had not used Stonewall. Given the dominance (and prominence) of Stonewall for LGB, the effect of this was less important. However, we have taken it into account in our interpretation of the fieldwork.

1.4 Layout of the report

The report is structured as follows.

The next chapter provides background to the case studies, describing their main business and employment characteristics. Although the study was not designed to examine in detail the LGB and T policies and practices in the case studies, the GEO were interested in any information we identified about LGB and T networks and transgender policies and actions. This information is also given in this chapter.

The following two chapters present employer case study evidence to identify motivators and barriers to creating LGB-friendly (Chapter 3) and transgender-friendly (Chapter 4) workplaces. Chapter 5 draws together the evidence from the case studies, the stakeholder interviews and the literature review to discuss the business benefits and costs of developing LGB and T-friendly workplaces. Chapter 6 turns to the external support available to employers in developing a LGB and T-friendly workplace. It describes the support available to employers (compiled from the web search, stakeholders' and employer case study interviews). It then assesses the adequacy of support available, based on the case study employers' and stakeholders' experience Chapter 7 then examines government's role in the development of more LGB and T-friendly workplaces, based on the evidence form the case studies and the stakeholders.

Chapter 8 presents our conclusions and Chapter 9 our recommendations.

2 The employer case studies

2.1 Introduction

This chapter provides information on the case study employers: their business and employment characteristics and their LGB and T equality policy. As stated above, the study had not aimed to provide details of the LGB and T-friendly actions taken. However, at the report design stage, the GEO felt it would be helpful to include information on networking and transgender equality actions. This is included below. This should be viewed as providing partial information on some of these actions and the issues arising, as the study was not designed to provide a comprehensive information on actions.

The next section describes the case study employers. Section 2.3 describes issues which arose in the case study interviews in relation to employee networks and Section 2.4 does the same in respect of transgender.

2.2 Case study employer characteristics

Twenty-seven employer case studies were conducted. Fifteen were private sector, eight public sector and four 3rd sector organisations, Table 2.1. Five case studies were in production industries. The case studies were predominantly large employers: 14 had over one thousand employees and three had 250 to 1000 employees. Of the remained nine were medium-sized (50 to 250 employees) and one was small with under 50 employees.

Table 2.1 Case studies: key characteristics

	Number of employees				Total
	under 50	50 - 250	250-1,000	over 1,000	
Private sector	**1**	**3**	**2**	**9**	**15**
Production			1	4	5
Law		2			2
Finance				3	3
Retail				2	2
Other services	1	1	1		3
Public sector		**3**		**5**	**8**
Local Authorities		1		3	4
other services		2		2	4
3rd sector		**3**	**1**		**4**
Housing		1	1		2
other services		2			2
Total	**1**	**9**	**3**	**14**	**27**

Further details of the case studies are given in Table 2.2 which gives the name by which the case study is referred to in the report. Twenty-one of the case studies were multi-site organisations, many with operations across the UK.

All, bar one, of the case studies had an equal opportunities statement. Twenty-five had an equal opportunities statement which specified sexual orientation and 15 specified transgender.

Table 2.2 The case study employers: individual characteristics

Study pseudonym	Sector	Industry	Number of employees	Location	equal opportunity statement any	sexual orientation	trans
Designco	Private	Design	under 50	London, single site	x	x	x
Umbrella5	Private	Skills	50 - 250	Several cities	✓	✓	✓
Umbrella3	Public	Sport	50 - 250	London, single site	✓	✓	✓
Umbrella2	Public	Architecture	50 - 250	London, multi site	✓	✓	x
Charity2	3rd sector	Employment, training and enterprise	50 - 250	UK wide	✓	✓	x
Housing2	3rd sector	Housing Services	50 - 250	North West, multi site	✓	✓	x
Charity1	3rd sector	Work with disadvantaged	50 - 250	Several cities	✓	✓	x
Umbrella1	Public	Local Government	50 - 250	London, multi site	✓	✓	X
Lawco2	Private	Law	50 - 250	London, single site	✓	✓	✓
Lawco1	Private	Law	50 - 250	London, single site	✓	✓	✓
Housing1	3rd sector	Housing Services	250-1,000	North West, multi site	✓	✓	✓
Foodco2	Private	Food processing	250-1,000	Scotland, single site	✓	✓	x
Umbrella4	Private	Sport	250-1,000	London, single site	✓	✓	✓
Fire	Public	Fire Services	over 1,000	North West, single site	✓	✓	✓
Bank3	Private	Finance	over 1,000	London, multi-site	✓	✓	x
LA2	Public	Local Government	over 1,000	London, multi-site	✓	✓	✓
Prodco1	Private	Manufacturing	over 1,000	Several cities	✓	✓	✓
LA1	Public	Local Government	over 1,000	London, multi-site	✓	✓	✓
Foodco1	Private	Food manufacturer	over 1,000	South East, multi-site	✓	x	x
LA3	Public	Local Government	over 1,000	North West, multi site	✓	✓	✓
Bank2	Private	Finance	over 1,000	UK wide	✓	✓	✓
Police	Public	Policing	over 1,000	a	✓	✓	x
Retailco1	Private	Retail	over 1,000	UK wide	✓	✓	x
Prodco3	Private	Production	over 1,000	UK wide	✓	✓	✓
Retailco2	Private	Retail	over 1,000	UK wide	✓	✓	x
Prodco2	Private	Production	over 1,000	UK multi-site	✓	✓	✓
Bank1	Private	Finance	over 1,000	UK wide	✓	✓	✓

[a] excluded to preserve anonymity

2.3 Employee LGB and T networks

Several of the case study employers had employee networks. A number of good practice issues were raised by the case study employers in relation to employee networks. These are discussed below. A further issue, on whether transgender people should have their own network or not, is discussed in Section 2.4.4.

2.3.1 Employee networks in small organisations and small sites

Small organisations and larger, multi-site organisations with small sites encounter particular difficulties in establishing an effective network. The case study employers provided examples of ways this was addressed through cross-employer networks and through electronic networks.

- Forming cross-employer networks. For example,

  o a network has been established across law firms in the City of London (Interlaw Diversity Forum for LGB and T networks) to bring together the LGB and T networks and representatives to share ideas and best practice; it meets monthly [Lawco2].

  One employer had been helped by Stonewall to establish links between employees in different organisations [Umbrella5].

- Electronic networks:

  o a large, multi-site employer used an electronic network to provide communication and links throughout the organisation,

  'Well, the network's online but we're all on the same intranet system so people can exchange emails. We have an intranet site which says all the opportunities, what's going on, what our policies are, our practices, who we get involved [with], who you can talk to and we have events through the year.' [Bank1]

  This approach need not be confined to large employers and one of the small case studies had been investigating establishing an electronic network [Umbrella3].

2.3.2 Network activities

The activities of case study employers' networks varied, from providing social and career support to individuals to providing a tool for business benefits to the organisation, or both.

Some case study employers used networks for business purposes,

'And I see the network group as a very important commercial body for us. And I think it's very important that the network group is commercial, that it's involved in advising us on how we outreach to clients and how we look for great new staff because in doing so, the network groups win the respect of our top tier of management. And it is important that they're respected because otherwise it becomes a bit more champagne that campaign.' [Bank1]

This may include organising participation in external events, seen as useful to the organisation for their public image in general and recruitment in particular [Retailco2].

Other case study employers used their LGB and T network to assist the development of LGB and T policies and practices,

> *'we had a policy already for transitioning… But I sat down with some trans members and we only had seven at that time in this group and said look where can we make this better? And that began a process of work where we actually rewrote the strategy, the selling operating procedures, the policy, rewrote it to include and I'm amazed at this but I made a point of including transgender everybody under that umbrella not just transitioning in the work place.… So we've now got this new policy that's more inclusive, still deals with transitioning but it actually deals with all the other issues as well that are starting to pop up.' [Police]*

The business benefits were not always confined to those from the employer's own employee network, as one case study employer gained information from the employee networks of other employers [Bank2].

Support for LGB and T individuals, whether through social events or with a more direct employment focus was another focus,

> *'And from my experience … the opportunity to be engaged in befriending and to exchange ideas about how you find your place in the workplace is hugely valuable, because a problem shared is ..' [Bank1]*

> *'So [we] have a party for Pride, we have drinks every couple of months or so. We go to the Stonewall champers type events and stuff.' [Bank1]*

2.3.3 Employer support for networks

The case study employers provided examples of different levels of support for their networks.

One described their organisations' support in establishing a network,

> *'[We're] right at the embryonic stage which is that we have somebody who you know is out in the workplace who is a, quite a senior director within one of our forefront businesses and he and I are working together to launch the network because each network has an HR support angle. So for the first … 12 to 18 months of the network HR will help play a sort of pivotal role in moving it forward but then as that first 12 months or so progresses HR will fall away so it becomes an employee network led by employees for employees and HR will be there in an advisory capacity but not a significant part to play but you know that's at the outset.' [Bank3]*

Some case study employers funded activities, for example, events, speakers and social activities [Bank3; Retailco2; Lawco2]. Some allowed time off to those organising the network, whilst others did not, but allowed flexibility to undertake network duties.

2.4   Transgender policies and actions

The following describes the transgender policies and positive actions identified in the small number of case studies which had taken action on transgender. Whilst all illustrate positive approaches, not all would be regarded as best practice by transgender organisations. One of the transgender organisations stressed that to develop a transgender-friendly workplace, policies and practices needed:

- to cover all gender identity issues and not focus on transitioning; and

- to be proactive, rather than reliant on an employee with a gender identity issue presenting themselves (as they are less likely to identify themselves unless proactive policies are already in place and problems remain hidden).

For more comprehensive information on employers' policies and practices to make workplaces more transgender-friendly, see, for example, the websites of Stonewall Scotland and the transgender organisations listed in Appendix 3.

2.4.1   Overarching statements and policies

Fifteen of the case study employers had an equal opportunities or diversity statement which mentioned transgender (or gender identity). Fewer had policies and practices stemming from their statement.

> *'The statement is designed to let trans people know that, if they work for us we will try to ensure that things are fine at work.'* *[Umbrella5]*

The lack of explicit policies and practices did not always indicate lack of action, as there is debate around whether trans should form part of gender equality policies [LA3]. The Police had decided trans should be moved from LGB to gender, but had not had the resources to make the move.

2.4.2   General policies and approaches

Few case study employers had specific trans policies, expecting to address trans as an *ad hoc* issue if it arose. However, others had:

- reviewed all policies to ensure they covered trans [LA3; LA2; Police];

- introduced transgender into its inclusivity strategy [Fire]; and

- developed a range of policies and practices.

For example, Bank1:

- included trans in its diversity statement and in its general background equalities policies to create the right background and structure;

- covered trans in the staff handbook; and

- sponsored and was involved with a trans organisation.

The respondent said that,

> *'integration of transsexuals in the workplace and gender reassignment and all those issues are immensely complicated*

and very, very individual. In essence, our handbooks talk very generally about the emotional experience of gender reassignment and that sort of stuff but the focus is upon really coming back to our specialist team and for every single case we would go out to the workplace, we'd talk to the individual and, if they were happy for us to do so, we'd talk to line management and colleagues to make sure that the integration's a positive experience.' [Bank1]

This individual approach was used in other case study employer policies and practices. For example, the Head of Diversity in a Local Authority said,

'It's about having someone working with that individual and getting support in if a manager doesn't feel competent or able to deal with it. But I think it's about being open, having a conversation with the individual and asking them how they want it to be managed. As opposed to making assumptions because I think one of the things is if you don't ask you go running around and going ahead and doing something without taking into account that individual's feelings. Because he or she might want to do it themselves or they might want that support, about telling their staff, telling colleagues about this etc. And yeah it's all the support around the medical side of it and you know the rehab, and coming back to work, and everything. So, it's just about I think that we would do it case by case to be honest, because one size won't fit all.' [LA2]

2.4.3 Training

Training on transgender was reported in some case study employers. For example, in one, it was an element of equality training for managers,

'It just explains what it is and explains what the company attitude is towards those issues i.e. that people need to behave in a responsible and inclusive manner.' [Prodco1]

2.4.4 Networks

Networks for transgender people can be for transgender alone or combined with other groups. The case studies provided examples of both.

Police had a separate transgender network. Due to the size of the transgender population, this is likely to be an option only for the largest employers, unless cross-employer networks are created. Internet approaches are also likely to be useful (see Section 2.3.1).

LA3, LA2, Prodco2 and Bank2 had combined LGB and T networks. Experience of the success of combining LGB and T in a single network varied. One case study employer had found that trans disappeared off the agenda in a combined network, although this could have been due to the lack of any transgender members,

'we have specifically mentioned transgender in our [network] mandate and our charter, and it's in our logo and everything like that. We haven't actually come up with any trans issues…you've got to pick your battles. And…just getting the monitoring in place,

just trying to push the gay, lesbian and bisexual agenda is what we're doing first and I imagine that would be the next evolution. And I suppose until we get a trans member in the group a lot of us don't really understand the issue anyway, so it's not something which has come up yet, but we'll welcome it as long as, as soon as we get, as soon as we get someone who's willing to fight that particular battle.' [Prodoco2]

A further issue for the scope of transgender networks was raised by one case study employer who said that, for those who had transitioned to female, the women's network, rather than a transgender network, was appropriate. Whilst women's networks should be open to those who have transitioned to female, those who have transitioned may continue to face transgender-specific problems and so a network with a specific transgender remit may be of assistance. Moreover, if transgender networks do not cover those who have transitioned, this leaves no appropriate network for those who have transitioned to male.

2.4.5 Other policies and practices

A small number of other trans policies and practices were found in the case studies:

- *monitoring*: one organisation collected data on transgender people on their recruitment application form; however, it was not clear how good this practice was, as the employer did not have an Equal Opportunities policy statement on trans [Umbrella1];

- *recruitment*: trans employees participated at recruitment fairs [Police];

- *sponsorship*: external trans events were supported (including hosting them) [Police]; these were often LGB and T combined; and

- *disciplinary* action: Prodco1 had developed a code of practice, which said

  '…inappropriate behaviour will be treated as such and if necessary action, including disciplinary action, will be taken against those who don't observe the behaviours in the code.'

3 Motivators and barriers to employers creating LGB-friendly workplaces

3.1 Introduction

As explained in earlier chapters, the case study employers were at various stages of developing LGB-friendly policies and practices, including some which had made no or little progress. In this chapter, first, the case study employers which had done little to make their workplace LGB-friendly (termed as 'inactive employers') and the barriers to their action are considered. Next, the chapter turns to the case study employers which had been developing LGB-friendly workplaces, some of which had been developing policies and practices for some time. It looks, in turn, at the initial motivators to introducing policies and practices, the barriers anticipated and experienced, whether and how these have been overcome and barriers to further progress.

The chapter focuses on lesbian, gay and bisexual-friendly actions. The next chapter turns to transgender.

3.2 Inactive employers: barriers to starting out

To identify the barriers to introducing LGB policies and practices, case study employers which were inactive in this area were asked why this was. A number of reasons for lack of activity were given, ranging from lack of consideration of the issue to a belief that LGB needs can be met within generic equal opportunity and diversity approaches. The reasons are described more fully below.

3.2.1 Sexual orientation is not a workplace issue

Sexual orientation was not seen as a workplace issue by some of the case study employers.

Some case study employers said that sexual orientation had simply **not been considered** as an employment issue. These included case study employers where equality in other areas had been explored and those where it had not been. Others had not considered equal opportunities at all. These included a small company with a workforce of seven which had not felt the need for equality policies or practice, believing that employees were treated fairly. The owner/manager stated:

> 'We don't need to [take action in this area] because we don't have any barriers.' [Designco]

Other case study employers believed sexual orientation to be **irrelevant to the workplace**. The human resources manager of a large food processing

company felt that the sexual orientation of staff was not a question they should be asking and suggested that it might be discriminatory as well as unimportant. Her view on monitoring for sexual orientation was that:

'It wouldn't be relevant to our industry. I would associate that being a question of discrimination, asking such a question. It wouldn't affect how we operate, how we do our jobs, how we function day to day. I'd be more fearful of risk of discrimination going down that road. Why highlight this area? Why would it be relevant?' [Foodco2]

When interviewed, similar views were stated by Designco which had not previously considered the issue,:

'It hasn't been an issue and I can't see it being one. It's not my business whether someone is gay or not and I wouldn't bother to find out.' [Designco]

These two employers had given little consideration to equality issues in any area, including gender or ethnicity. It is perhaps not surprising in this context that they felt sexual orientation to be irrelevant.

Other case studies believed LGB actions to be **irrelevant to their organisation**. These employers, with no or minimal LGB policy and practice, assessed themselves as gay-friendly on the grounds that they were 'inclusive'[Foodco1], had a culture which was 'friendly and accepting' [Umbrella3], that they 'would not tolerate discrimination' [Foodco2] or had a 'fair ethos' [Retailco1].

Two further issues reinforced some of the case study employers' view that how LGB-friendly their organisation is is not a workplace issue. The first of these was their belief that they had no LGB employees. However, these case studies said that the presence of LGB staff would not affect their policies and practices. The second issue which appeared to reinforce the view that sexual orientation was not a workplace issue was the lack of recognition of the business benefits of a LGB-friendly workplace [Foodco2] or lack of recognition of the link between this and LGB employee commitment [Designco; Foodco2].

3.2.2 Sexual orientation is covered by equality and diversity

A number of case study employers expressed a commitment to equality, but had not given specific consideration to sexual orientation. They had done nothing beyond referring to sexual orientation in their equality policies.

These case study employers included two charities who had considered equality carefully in the context of diversifying their workforce to better reflect the communities they served. They had explored equality in general and in relation to race, but not sexual orientation. They were also interested in opening up employment opportunities to clients and to volunteers, but again had not considered this in relation to sexual orientation. At the same time, these case study employers had employees who were out at work and the employers did not appear LGB-unfriendly.

The view that sexual orientation is not a key area of disadvantage was expressed by a case study retail company which had also started, and then

stopped, sexual orientation equality work. Its work had not progressed because of antipathy from within human resources to monitoring sexual orientation, a perceived lack of interest among staff and belief that it is not a barrier within the organisation:

> *'I work with a lesbian girl. Are her needs really any different to mine just because she's a lesbian and I'm not? She's not convinced and I'm not convinced. We have this discussion quite a lot in terms of, "Well, what does she need?" I guess with disability or race or religion and belief, there's a lot that we don't know and there's a lot we can learn, whereas with sexual orientation, it doesn't really work like that, it's slightly different.' [Retailco1]*

The view that LGB staff do not have unmet needs contributed to the organisation's view that it should not be committing resources to this area. It had decided, instead, to adopt a broad view on equality, focusing on no individual strand.

3.2.3 Sexual orientation is difficult and sensitive

Previous research has found that sexual orientation issues are viewed as more controversial than other equality areas and that some managers and trainers are less comfortable in addressing sexual orientation (Dickens *et al.*, 2009; Bond *et al.*, 2009). This may have been a factor in the under-development of this equality area in some of the case study employers.

Some case study employers had started to develop LGB policies and practices, but had then questioned whether this was the right thing to do. This largely came from a concern that they should look at equality in general, and that sexual orientation was more difficult. A manufacturing case study employer decided to progress equality in general, and to focus to some extent on gender before working specifically in the area of sexual orientation. The representative of this company shared the views of those of Foodco2 and Designco that sexual orientation is a sensitive area. This led human resource specialists to worry that the organisation might do things in the wrong way. In one case study company, they had been taking advice on monitoring and other possible measures from a small group of LGB staff and were concerned that any mistakes could impact on these employees:

> *'I think there's a piece about how do you manage it in the right way and it does feel slightly more sensitive because it's not a visible difference…there may be a concern that if we don't manage it in the right way these people could feel exposed'. [Foodco1]*

This respondent also felt that, while the organisation was not necessarily LGB-friendly, in terms of openness about sexual orientation, that LGB employees were progressing their careers and that there was no urgency to carry out work in this area.

3.2.4 Vicious circles

The case study employers which had done little illustrated two vicious circles which had been described in interviews by some of the stakeholders and LGB organisations.

Firstly, some LGB-unfriendly case studies believed they had no LGB employees because no employees were out at work. This may have been because the workplace was LGB-unfriendly and so either employees were not out at work or there were indeed no LGB employees because applicants avoided the organisation or LGB employees left. The perceived lack of LGB staff employer was seen by the employer as a reason to do nothing and so the situation was perpetuated.

A second vicious circle exhibited in the case studies was when the employer failed to identify differences in achievement and satisfaction between LGB and heterosexual staff (because they did not monitor this). This lack of evidence of difference reinforced the employers' views that there was no problem, that sexual orientation was not a workplace issue and that it was covered by diversity or equality policies generally. Thus a vicious circle of inaction was perpetuated.

3.3   Active employers: motivators to starting out

Case study employers gave a range of reasons for initiating work in the area of sexual orientation. Some of the drivers were general, for example to improve equality and diversity policy and practice across equality strands, while in other cases they were more specific, for example to improve links with the gay community. In this section we consider the range of reasons given by case study employers for working in the area of sexual orientation.

3.3.1   Long-standing commitment to equality

A number of case study employers had LGB policies and practices in place for a number of years. Some respondents were not aware of any specific drive to develop these, but explained their organisations' actions with reference to its general ethos and commitment to equality, diversity and inclusion generally. Others were able to identify drivers to this work. Case study employers engaged in LGB policy and practice for some time included banks [Bank 1; Bank 2], a retail group, [Retailco2] and two local authorities [LA1; LA3]. The representative of one local authority explained its long-standing commitment to equality:

> 'Our work on sexual orientation is really rooted in a kind of strong foundation of and commitment to equality in the borough per se. Historically, race equality has been really high on the agenda and it's had real political and organisational kind of leadership and commitment right behind it. And I think that's been the root of, very early on to say that actually we need to make sure that we are promoting equality across the other strands. And I think we've done that a lot earlier than other people'. [LA1]

Local authorities and a private company [Prodco3] referred more specifically to the importance of representing the community they served. One of the local authorities was located in an area with a sizeable and visible LGB community and was aware of its duty to meet its needs [LA3]. Similarly, the Head of Diversity of a bank explained:

'It is part of our diversity and inclusion work to make sure that everyone is respected and people can be themselves at work and can come in and feel comfortable and do their jobs and not have to hide their personalities or part of their life.' [Bank2]

A number of case study employers explained how their LGB actions had grown out of earlier activities, either on equality in general or in another equality area (which was usually gender equality). One large engineering company had been engaged in initiatives to increase the gender diversity of its workforce for some years and had extended this perspective to other equality areas, including LGB and race [Prodco1]. Two case study employers [Umbrella1 and Retailco2] had developed a strategy or a group to deal with equality in general and had then carried out work specifically on sexual orientation. In one of these cases, a public sector umbrella body, the corporate equalities group had been encouraged to look into the area of LGB through gay and lesbian members of the group [Umbrella1].

3.3.2 Duties, enquiries and influential events

Legal requirements on employers are often cited as a key reason for action in the area of equality and this was evident as a driver in some cases. A number of case study employers were keen to ensure that they were meeting their legal responsibilities. In some cases this led to action in particular areas, for example in updating policies in relation to partner rights in the areas of pensions and time off for caring for a sick partner. These changes were introduced by case study employers following the passing of the Civil Partnerships Act in 2004. Legislation was also seen helping case study employers to make a case for having LGB policies and practices, to help convince staff who might object to or even prevent progress in this area.

Public sector case study employers were influenced in their equality work by legislation and requirements on public bodies, including the public sector equality duty introduced in 2005, requiring them to put in place a single equality scheme. The Stephen Lawrence inquiry and its recommendations were an important driver to the work of a number of public sector employers in the area of equality, and in turn a driver to LGB interventions. Homophobic hate crime and tragic events such as the bombing of the Admiral Duncan pub in Soho gave particular impetus to work in this area within one public sector body [police]. One case study employer had been given additional encouragement to look into sexual orientation as an equality area following an internal staff disciplinary case which included accusations of homophobic bullying [Umbrella2].

3.3.3 Business benefits

As we explain later, a number of case study employers reported outcomes from their LGB work which could be described as business benefits. In some case study employers the expectation of these benefits had been a driver to initial work on LGB.

Previous research has identified recruitment and retention of staff as a key influence on employers developing LGB policies and practices (Guasp and Balfour, 2008; Colgan et al, 2006; Hall and Panton, 2009; Bond et al, 2009).

Recruitment, and to some extent, retention of LGB staff was an important factor behind LGB actions within some case study employers. A large engineering case study company had been involved in a number of external initiatives aimed at attracting women to engineering careers within the company and became aware of the benefits of this work in attracting the best recruits. More recently it had been engaged in recruitment initiatives aimed at attracting LGB individuals. Another large employer also framed its work in the area of LGB within its aim to attract and retain talent and to develop people from diverse backgrounds within the company. The Head of Diversity explained:

> 'We are working in an industry where talent is scarce and so it's very important that we attract, develop and retain people with talent and those people will be gay, lesbian and straight. It is very important that we create an environment where people want to join us and they want to get on and they want to stay with us.' [Prodco]

She went further, to make a link between having a clear commitment to equality and individual performance:

> 'We believe that once people are in the business there's a very strong link between feeling valued and respected as the individual that you are. It's sort of human nature but as a result we firmly believe that there will be a very strong link between how inclusive we make our work environment and our performance as a business.' [Prodco]

Other case study employers shared this company's aspiration to be viewed as a top equality employer. The Head of Diversity for a bank stated:

> 'It is also probably part of our marketing but that is part of the attraction. It is part of maintaining our continuous improvement and maintaining our position as a diverse employer in the UK.' [Bank2]

A further incentive for this employer was to create a more inclusive culture throughout the organisation:

> 'It is also about informing the rest of the group and working towards a better understanding of inclusion so that our LGB employees, from the UK, may have a good experience or feel comfortable at work to make sure that they are also treated with respect when they have overseas placements.' [Bank2]

Similar aims and values were expressed by the Director of Human Resources at another bank in explaining the importance of having inclusive recruitment materials and approaches in relation to sexual orientation:

> 'We want to create workplaces in which people can genuinely be themselves and feel valued. There's a really important talent agenda. And if you look at the commercial value of human capital, for example in our investment bank, it's millions and millions of pounds associated with individuals because talented individuals are capable of doing great things for us. So we need to make sure that we don't narrow that talent pool because that's our competitive advantage, is having the very, very best team. And you see that on

the news all the time at the moment about fantastically paid bankers and stuff. Well they are, in some cases, paid quite well but that's because they're really, really talented. And the gay ones are just as talented as the straight ones.' [Bank1]

And the Head of HR of a public sector umbrella body case study explained:

'Part of our motivation is to make sure that our employees are engaged and committed to the organisation and feel that it's a good place to work, and that can include your sexual orientation or your ethnicity.' [Umbrella1]

Other business benefits were identified in relation to organisational performance and to services to the community. Local authorities were focused on what Bond and colleagues call the 'service case', rather than the 'business case' (Bond et al, 2009). In the police authority case study clearing up crime involving LGB people, including hate crime, was a driver to forming closer policing links with the community. A further driver to their LGB work was to improve practices in dealing with the community, for example searching of transgender suspects. Two other case study employers raised business benefits other than in attracting new recruits as key drivers behind their LGB work: a bank and a law firm. The law firm was aware of an interest among clients in firms' policies and practices in relation to LGB, while the bank was keen to benefit from the 'pink pound'. The Director of Human Resources quoted above talked of this particular benefit:

'We recognise the fact that our clients are fantastically diverse. There has been a ground shift in the way that commercial organisations deal with the LGB market, because it is a market and it's a very, very substantial market. And it has unique requirements. Wealthy gay clients have very different financial circumstances sometimes to straight folks. There's a huge retail market as well which is why we want to be visible and involved in things like Pride in Brighton and Manchester and London, demonstrating support for our staff, of course, as a progressive employer of LGB people, but also getting the brand out into the public environment and demonstrating our confidence as a commercial organisation in being involved in the LGB agenda.' [Bank1]

This case study employer had therefore identified the opportunities to benefit from communicating with LGB clients in all areas of its operations.

3.3.4 Influence of the industry or sector

Some case study respondents referred to influences from within their sector or industry as a driver to their LGB work. Representatives of a law firm talked of how they had become aware that other law firms were becoming active in this area, had joined Stonewall and were developing an LGB-friendly profile. As stated earlier, staff were also starting to be asked about LGB policies and practices by clients [Lawco2]. Respondents in three companies talked of the influence of their American ownership on policy and practice in this area: in one case this was partly a result of homophobic incidents in the US and subsequent action within the organisation to deal with these; in another case,

the greater openness about sexual orientation in the US office, compared with European branches, had been a positive influence on UK policy and practice [Lawco1]. In the third case, how LGB-friendly the firm was was explained with reference to the ethos of the New York office which influenced the culture of the UK branch [Lawco2].

A perceived need to address LGB issues within the industry was also evident as a driver in the case of two case study umbrella bodies working in the same sector, where homophobia has been a long standing feature of the culture. Although they shared the same driver, one of these case study employers had done little except introduce a policy and to monitor staff, while the other had a range of actions, including a diversity board with openly gay staff and industry representatives, work with sponsors around sexual orientation, outreach and community work on LGB, recruitment events for LGB people and staff monitoring. This difference in achievement appeared to result from a clearer commitment to LGB equality within one case study employer and the feeling that, as a temporary body, it had no time to waste:

> *'A lot of what prompted it was the moral reasons and the efficiency gains and resources reasons. But also the thing that I guess we've got that is unique to us our deadline. Are we going to talk about it and put it into next year's business plan or are we just going to do it?' [Umbrella4]*

As we explained earlier, some case study employers had been working in the area of sexual orientation for some time and a number took pride in being ahead of others in this area of equality encompassing LGB. Equally, some case study respondents felt they were looking into LGB issues somewhat late in the day, that others were ahead and that they needed to catch up. The comparator used by these respondents was the industry in which they were located. The representative of an international bank explained that:

> *'We felt we were behind the curve. You know every other bank has a women's network and has various other employee networks and we just didn't. We had lots of things on the social side so sort of sports clubs and that type of thing but we didn't have anything that was more fundamental to day to day working.' [Bank3]*

A housing association and the fire service also mentioned the importance of keeping up with trends within their sector, and there was competition nationally within some sectors to be considered a 'best practice' organisation for LGB. This competition was strongest among larger case study employers with a higher business and public profile. These findings suggest that that knowing that other organisations in the same sector, particularly competitors, have achieved more in developing LGB-friendly policies and practices can encourage the slow movers to take action to catch up.

3.3.5 *LGB employees and networks*

The influence of LGB employees was an important factor behind the development of policies and practices in a number of case study employers.

A number of case study organisations had an LGB group which had helped to raise the profile of sexual orientation as an equality area throughout the wider

organisation, including the trade areas and satellite offices. In some cases, for example a law firm and an umbrella body, the LGB staff network had been a driving force behind management action, although this had not been the purpose of the network. In another case, LGB staff in a housing association (which had previously been within a local authority active in LGB equality) took the initiative of addressing LGB issues within the new organisation. This included making satellite offices more LGB-friendly [Housing1].

In other case study organisations it was apparent that a senior manager had driven the work through a commitment to LGB equality and sometimes a straight manager with a strong commitment to equality. This was seen to have the effect of leading to action which would not have been taken and to accelerating the development of policy and practice on sexual orientation. For example the senior manager of one case study organisation, gave the following response to the question of whether this work would have been carried out in his absence:

> *'I really do believe it would have been at some point. I don't think it would have been as soon. I don't think it would have been as explicit and I don't think it would have been as deeply embedded.' [Umbrella5]*

The belief that the organisation should be working to improve policies and practices in relation to LGB was also held by non-LGB staff. This view was expressed by representatives from a range of case study employers, more recent arrivals to equality and diversity and those with a long-standing commitment. In explaining why the company extended benefits to same sex partners as long ago as the 1980s, a representative of a large company explained:

> *'It just felt the right thing to do. I've just talked about the business case, we talk about compliance through law and I think a lot of it is just the right thing to do, its common sense, its being fair, its being reasonable.' [Prodco3]*

Because having an LGB network was a driver to continuing work on sexual orientation, some case study employers were concerned that the network should be strong and active. One employer was concerned that the profile of its network had declined:

> *'We have had feed back very recently from employees that are new in to [Bank2] coming from other investment banks and felt that the LGB network and presence was not very strong at [Bank2] compared to their previous employers so that made us think that we really do need to re-invigorate our policies in that they have been there for so long.' [Bank2]*

It therefore felt the need to support the group to reinvigorate in order to help drive LGB equality aims within the company.

3.4 Active employers: barriers to starting out

We asked research participants why their organisations had not taken action in the area of LGB equality previously, about the barriers they anticipated and still experienced. Here we look first at the barriers identified by active case study employers, and at whether and how these have been overcome. We look later at barriers reported from within case study employers which are still relatively inactive in relation to LGB issues and have not addressed barriers to working in this area of equality.

3.4.1 Barriers within active organisations: antipathetic culture

We asked employers about the barriers they had either anticipated or encountered when considering work in the area of sexual orientation, or in the early stages of taking action. Most respondents spoke less about anticipated barriers than those they had actually experienced. In some cases this was because they were not working for the organisation at the time, while some others either could not remember or just had not anticipated barriers.

In a number of case study employers, policies and practices in relation to sexual orientation had been in place for some time, pre-dating respondents' arrival. Therefore, a number of respondents did not know the concerns of those who worked in this area in the early days of LGB action. These case study employers included a bank, a law firm and a local authority [Bank2, lawco2, LA3]. However, in the bank and local authority it was considered doubtful that a serious adverse reaction or barriers would have been anticipated because the ethos of the two case study employers emphasised equality. However, not all early introducers of LGB policy and practice had this experience. A police force where action began to be taken on LGB equality in the late 1990s anticipated and experienced a number of barriers, including questioning its relevance, lack of knowledge or an 'agenda' around sexual orientation and fear of offending both LGB and straight employees. Other barriers included negative perceptions about gay and lesbian culture, including misconceptions about HIV and associations between gay men, promiscuity and use of public sex environments. The respondent felt that these perspectives impinged on the organisation and made work on sexual orientation difficult:

> 'I don't suppose I really blame the Police because we were in a landscape or climate that was still quite draconian in terms of the freedoms LGB people had, but really I think the legislation from 2003 onwards has been an enormous help.' [Police]

The Director of Human Resources at a bank [Bank1] believed the reasons why the organisation had not introduced LGB policies and practices before 2000 was 'social and socio-economic workplace climate' and, echoing the view of the Police respondent that there was no 'real agenda' around LGB and employment at the time. Others described it as 'not being on the radar'. Those which had started to develop LGB policies and practices more recently sometimes felt advantaged in not being hampered by previous bad experiences. For example, an umbrella body felt that it could even prioritise sexual orientation as an area of equality because it had no history of having made mistakes or of bad practice and hostile reaction [Umbrella4].

For some employers, internal culture was anticipated and experienced as more of a barrier than the wider culture beyond the workplace. Previous research has found workplace culture to play a key role in determining how comfortable individuals are about their sexual orientation or gender identity. Moreover, a masculine atmosphere at work has been found to inhibit employees coming out as gay (Hall and Panton, 2009). Confirming these findings, organisational culture was found to be more of a barrier in male dominated than mixed workplaces, for example manufacturing, the sports sector and the fire and police services. A fire service had initially taken a 'confrontational' approach to LGB issues, which included challenging employees through equality training and requiring employees to take part in Gay Pride or face disciplinary action. It found this to be counterproductive, and decided to take a different approach, which emphasises the relevance of equality for everyone.

Some case study employers had anticipated an adverse response from LGB staff who might feel 'exposed' by the new emphasis on sexual orientation. However, this had not happened and adverse reactions came entirely from straight employees. A number of case study employers had received complaints from employees about their organisation's support for LGB activities. This sometimes took the form of questioning why the organisation should want to introduce policies and practices in this area, described by one respondent as 'quizzical looks' rather than outright hostility. However, in other cases, opposition was more vocal, and included a group of employees asking to set up an association of 'straight heterosexuals'. [Fire]

Problems were sometimes more anticipated than real, with the police anticipating a stronger 'backlash' than materialised. The respondent described how:

> 'When we marched at [gay] Pride in uniform in 2003 there were a few disgruntled colleagues who didn't like the idea of the uniform being sullied and all that sort of stuff but there was never a big backlash.' [Police]

3.4.2 Barriers within active organisations: inertia and bureaucracy

Inertia appeared to be more of a problem than hostility for some employers, with inactivity at senior management level on LGB issues acting as a strong barrier. A number of respondents emphasised the importance of commitment by senior managers to the progress an organisation could make in LGB equality. The representative of an international bank described how other HR managers had not wanted to progress LGB policies and practices and it was only when he himself began talking with the chair of the LGB network that this changed. The experience of this case study employer shows the importance of having commitment within HR and at senior levels in addressing LGB issues. [Bank3] There were also indications from some of the case study employers that organisational structure can act as a barrier to progressing work on LGB issues. In two very different case study employers, an umbrella body and a large private company, which had been publicly owned [Umbrella1; Prodco3], a rigid hierarchy was seen to have acted as a barrier to equality work, including LGB. Introducing flatter structures and improving top-

down and bottom-up communication was seen to help remove this barrier and to facilitate the development of actions in relation to LGB and other equality strands.

3.4.3 Barriers within active organisations: lack of knowledge and understanding the issues

A number of respondents talked of how, in the early days at least, colleagues at senior and other levels of the organisation were not initially supportive of action in relation to LGB because they could not see the relevance of sexual orientation to the workplace. Some of these case study employers were fairly new to equality actions in general so that the case had to be made for equality first, and then for LGB policies and practices. It was very unusual for case study organisations to have addressed LGB before other equality areas. Case study employers had generally progressed from other areas of equality, typically gender and race, before giving any real consideration to sexual orientation. As we explain later, some case study employers had not got beyond this stage, and were either taking an approach of dealing with equality as a single area, or were aiming to have got to grips with gender first, before addressing LGB issues.

The development of LGB policies and practices was hampered by the view that it is a problematic area. A number of respondents referred to the perception that sexual orientation was 'difficult', meaning, partly, that its relevance was not easily recognised by some employees and managers and so it was difficult to progress LGB actions in the organisation. This may account for the slowness of some employers in developing practices in this area.

Although the problem of seeing the relevance of LGB policies and practices was encountered in case study employers where the culture was described as homophobic or gay unfriendly, it was also found in case study employers without strong negative cultural influences. In these workplaces the problem was believed to be one of understanding how sexual orientation is relevant to work, of how an individual's sexual orientation might affect how they apply for work, how they experience work and progress within an organisation. In case study employers where the culture in relation to LGB action was not hostile, this did not seem to be a major barrier but required someone to explain to colleagues and managers why sexual orientation is a workplace issue. This is important because managers can act as a barrier to employers' efforts and initiatives aimed at creating an inclusive environment for LGB staff and may lack information to deal with issues relating to sexual orientation (Hall and Panton, 2009; Dickens *et al*, 2009).The representative of an umbrella training case study employer explained how:

> *'Some of the people at administrative level might have just questioned a bit why we were doing it but when we explained, they absolutely got it, understood it, supported it'. [Umbrella5]*

One particular barrier was identified in the perception that sexual orientation is a 'personal' or 'private' matter.

'White heterosexual men will say, 'this has gone a step too far. This is private, why are you doing it? In other words, it's an intrusion. Meanwhile they go on about their sexuality all day long, talking about their girlfriends and wives and families and all that sort of stuff, so it's all very selective. We did get exactly as predicted three white heterosexual men from around the organisation and they emailed us and said 'Why is this happening? It's all gone a step too far'. [Umbrella2]

The case study employer had anticipated this as a barrier and planned the introduction of policy and practice around this potential objection. Another respondent commented that,

'People sometimes only ever see the first three letters, s-e-x and unfortunately we tend to get depicted as sexual objects rather than people, so you've got those sorts of barriers to get over.' [Police]

For some case study employers, the problem of developing LGB practices was not about the relevance of this work, but knowing in detail what issues it should be pursuing. Case study employers both starting out and with many years of experience of working in the area of LGB equality had experienced difficulty in knowing what the issues really are for LGB employees. A local authority with many years of experience in LGB policy and practice identified a problem with knowledge in this area. A head of service explained:

'Now the fundamental problem is it's really difficult to know what the hell the experience is of LGB people. We just haven't got the research, we haven't got the data.' [LA1]

In some case study employers other equality areas were being addressed, particularly gender and race, and the emphasis had remained in these areas or actions had been considerably stronger and more sustained. One respondent, representing an umbrella case study employer explained that:

'Equality is a challenge full stop. It was easier to use women as a lever to get the agenda on the table and then you bring in LGB, disability, religion and belief.' [Umbrella3]

However, full progression from the 'easier' areas of gender and race to more 'difficult' issues of sexual orientation had not always been made.

3.4.4 Barriers within active organisations: lack of legal requirements

As discussed above, legal requirements were a motivator for employers to make their workplaces more LGB-friendly. The converse of this was that lack of legal requirements and, particularly, requirements less stringent for LGB than for some other equality strands could act as a barrier,

'We are trying to go down a route of good practice of getting it [monitoring] for the other three diversity strands [faith and belief, LGB and T and disability] but it's because it's not legislatively required so that has been a huge problem in convincing HR you need to include these other three in monitoring and their answer has in the past been well we don't legislatively need to do that so we're not going to.' [Police]

3.4.5 Cost as a barrier to LGB policies and practices

The question of whether cost as an actual or perceived barrier to introducing LGB policies and practices was raised with interviewees. Responses fell into two main groups: those who said they had not considered the cost of taking LGB actions and those who recognised the cost of this work. However, among those who had introduced policies and were developing practices such as training and monitoring, there was general agreement that their approach had not been determined by considerations of cost.

A number of respondents were keen to say that cost had not been a factor in the organisation's decision to pursue LGB actions. These included an engineering company which had made little progress because of hostile organisational culture [Prodco1], and an umbrella body which had focused on LGB issues both in its marketing and in the workplace [Umbrella2].

While most respondents in case study employers which had taken the approach of incorporating LGB within their equality work stated that this was not because of cost, one large company had taken this approach for precisely this reason [Prodco2]. The Head of Diversity explained:

> *'Everything we do has limited resources and you have to make decisions over the best use of these resources. So for example if somebody said 'rather than running a diversity course we should run one course on what its like to be lesbian and we should run another course on what its like to be black and we should do something else and something else', we would say well no actually we don't have the resource to do that. The best way forward is to combine it and train leaders in inclusive management for example. So to be honest there's always going to be some sort of cost consideration when you're running a business but what is the best use of our resources?' [Prodco2]*

Several respondents felt that, while there had been costs to work in this area, the benefits outweighed the expenditure.

Therefore, costs were perceived to be relatively small, often accounted for within existing budgets, and as part of necessary expenditure. While some costs of taking LGB actions are clearly difficult to itemise and separate out from either equality work in general or from organisational operations, it was perhaps surprising that many respondents did not seem to recognise the cost of some actions, with or without considering the benefits.

3.5 Active employers: overcoming initial barriers

We have described some of the barriers anticipated by respondents to the introduction of policies and practices on sexual orientation, and those which they experienced. In this section we look at the different approaches case study employers had adopted to overcome these barriers.

3.5.1 Having conviction

One approach was to progress work in this area from a conviction that it is the right thing to do. By adopting a principled approach, employers could equip

themselves to address employee objections and criticism. Case study employers which were most successful in this approach were those with a strong organisational ethos in relation to equality and diversity, for example local authorities. [LA1, LA3]. A head of service at one local authority explained that:

> 'Our work on sexual orientation is really rooted in a kind of strong foundation of and commitment to equality in the borough per se. Historically, race equality has been really high on the agenda and it's had real political and organisational leadership and commitment right behind it.' [LA1]

Another key factor in being able to proceed in the face of anticipated or actual adverse reaction was commitment from a senior level within the organisation. [Umbrella5, Bank3]. This was also identified by other case study employers as key to establishing and maintaining a gay and lesbian-friendly culture within the organisation [Umbrella4, Charity2].

Case study employers with LGB networks established at an early stage also seemed to be better equipped to deal with initial barriers than those which had not. Case study employers with the strongest and most active LGB networks were generally larger than others. Bond and colleagues found evidence that LGB employees gained the confidence to come out more widely in organisations with networks (Bond et al, 2009). In terms of their influence, networks appeared to be most effective where they had input into the development of policy and practice, rather than function largely or solely as a support network or social group. It was in larger case study employers where they seemed to be performing such a role. However, it is undoubtedly easier to establish a network in a gay-friendly environment and difficulty in establishing an LGB network may also be indicative of deeper problems of homophobia or other cultural barriers to making workplaces more LGB-friendly. Therefore one might expect staff in organisations with an LGB network to be more welcoming of LGB policies and practices than in organisations without such a presence.

Another way in which barriers were overcome was by introducing LGB and other equality work at a time of organisational change, where long-standing notions about what is appropriate policy and practice can be more easily challenged and change can be accepted. [Prodco3].

A further, and key, factor, in overcoming initial barriers to work in this was having someone within the organisation who would take it on, act as a champion and argue the case for improved policy and practice on sexual orientation. Where such an individual was at senior level, progress appeared to be faster and capable of making the change in culture in which openness about sexual orientation could be achieved. (See also Section 3.3.5.)

3.5.2 *Overcoming adverse reaction from staff and other stakeholders*

While the approach of many respondents had been to 'just do it', some were more cautious, with staff reaction the key concern, and to some extent reaction from other stakeholders in the organisation, for example customers. Some respondents were pleasantly surprised that the negative reaction, or

'backlash', that they feared had not materialised. However, this was not always the case. We referred earlier to adverse reaction by straight employees within the fire and police services, which had included a request to set up an association of 'straight heterosexuals' [Fire]. Case study employers had received complaints from staff, particularly in relation to involvement in LGB activities such as Gay Pride. One case study employer, a housing association had received complaints from its customers following its participation in such an event. The Equality and Diversity Officer explained:

> *'When we did Pride, we got a few comments, like 'what are you doing spending your money on this?' My manager got one in particular, and he's gay himself and was quite glad to be able to respond to that. It was very much 'sorry you don't agree with this but this is a policy for our organisation and we're proud to support it'. [Housing1]*

These findings suggest the importance of showing the relevance of policies and practices to employees. Indeed, where adverse reaction had come from staff, the main response by case study employers had been to explain the need for LGB policies and practices. Although this varied between case study employers, the importance of valuing all employees within a diverse workforce, and creating an environment where all employees could be themselves and take pride in their identity were the key messages which case study employers aimed to convey.

3.6   Active employers: barriers to progressing

We have described how case study employers overcame initial barriers to taking action in relation to sexual orientation, and that many had adopted the approach that they would just go ahead and deal with the barriers they anticipated. In reality, as we explained, few case study employers experienced major barriers or overwhelmingly adverse reaction when they began to take action. However, as case study employers progressed to other activities and practices, including monitoring of staff and support for LGB events, they tended to experience some barriers, particularly in attitudes of employees, members of the public and sometimes managers. In this section we describe the barriers experienced by case study employers in progressing work on LGB equality and how they dealt with these.

3.6.1 Organisational culture

A number of case study employers faced both initial objections from staff and on-going criticism of its work on LGB equality. This was most apparent to case study employers in their support for external events which highlighted the commitment of the organisation to LGB equality. We have described how some case study employers received negative feedback when they decided to show their commitment to lesbian and gay equality by taking part in Gay Pride events. In one case study employer this included resistance from staff who had been asked to take part in an event [Fire]. In other cases objections came from members of the public rather than employees alone. The response of case study employers receiving such complaints had been to continue their

support for external events. One respondent described how senior staff within the organisation continued to receive letters of complaint from staff about its support for Gay Pride events, but that these were regarded as to be expected rather than something that might affect the organisation's practices. The respondent explained:

> *'The Commissioner probably gets the odd letter [of complaint] but believe me if we didn't do it now, there'd be far more letters.' [Police]*

A general, rather than specific, barrier to progressing beyond first steps was identified by a number of case study employers in the prevalence of a macho and gay-unfriendly culture. This has been found by previous research to play a major role in determining employees' attitudes in relation to their sexual orientation (Hall and Panton, 2009). Where it had been possible to establish a LGB staff group, this barrier had been somewhat eroded. However, this had not always been possible. A manufacturing company had not been able to help establish a staff group because in its workforce of several thousand, few were openly gay, lesbian or bisexual. A senior manager explained:

> *'There are probably many organisations where coming out at work is not an issue. In my view it is here, that's why so few people have come out. Until we can do something about that culture, I think it's pointless really, trying to get a support group together, because so many people would just be reluctant to show themselves as that orientation.' [Prodco1]*

The organisation had therefore been taking other steps to become more LGB-friendly, including policy development recruitment and support for external events. One aim of these activities was to achieve greater diversity in recruitment, including through boosting the numbers of LGB employees. In relation to improving making the workplace more LGB-friendly specifically, it was conducting a staff satisfaction survey and aimed to analyse responses by sexual orientation; and to look for an LGB executive champion. However, the process of becoming LGB-friendly was seen as a difficult one:

> *'I don't underestimate changing a culture, whatever that is, in a company. It is not easy.' [Prodco1]*

Similarly, the representative of an oil company explained:

> *'We're an oil company. It's quite a macho, white male, white straight male environment and it's trying to overcome those barriers which is what we're doing.' [Prodco2]*

There were indications that objections from staff to LGB equality measures can change over time. The representative of a large company explained that, since it began taking action on sexual orientation around 20 years ago, the nature of objections had changed.

> *'I think we've moved on hugely from the sort of old attitudes of 'It's political correctness gone mad'. That's faded into the past, but there are prevailing attitudes that minorities get some sort of better set of rights.' [Prodco3]*

The belief that LGB staff may enjoy an unfair advantage was found to exist in case study employers which had made considerable progress in developing LGB policies and practices. The representative of a third sector case study employer had experienced comments from heterosexual staff that lesbian and gay employees had been favoured in recruitment and promotion [Housing1].

More specific and overt objections to pursuing LGB actions could also become more apparent over time, with the views of religious groups raised by some respondents. The representative of one case study employer felt that religious belief was sometimes voiced as a more legitimate or acceptable way of objecting to LGB actions, since it appears to entail cultural difference rather than outright bigotry. For this reason it may be more difficult for employers to address. In one case study employer objections to LGB actions came from senior managers, among other staff. As the respondent explained:

> *'We've got some fairly senior managers who go on about 'I don't see why I should have to promote and support this, because it goes against my religion.' [Fire]*

This organisation was addressing concerns of religious groups in relation to LGB policies and practices through staff training. Objections from within senior management were seen as more difficult to overcome than among more junior staff since they were aware of the reasons for LGB actions and still expressed negative views. These findings raise the need for employers to emphasise to employees the importance of separating out personal views and prejudices from professional behaviour, and to conform to organisational values and goals.

3.6.2 Achieving cross-organisation support and implementation

One of the main barriers experienced in progressing LGB equality actions was in bringing on board all parts of the organisation. Many case study employers were spread across a number of sites, within the UK, Europe and the world, and respondents were able to make comparisons across these divisions and sites in their progress in making the workplace more LGB-friendly. Europe-wide companies reported that progress had been greater in the UK, usually their London office, than in other European sites. However, the biggest problem for UK-based case study employers was that branch, satellite and remote locations were less LGB-friendly, compared with head offices. Therefore, a number of respondents were able to say with some degree of certainty, that the head office was 'LGB-friendly' but that the experiences of LGB employees working outside of head office might be less positive. This was explained with reference to three factors: head offices and divisions in gay-friendly cities were seen as more friendly than average because of the wider cultural environment; branches were less diverse than head office environments in other ways and male dominated sites could foster homophobia; and low staff turnover in some peripheral sites perpetuated a non-diverse workgroup, particularly in relation to age. Therefore, local authorities identified a problem of council depots as being less LGB-friendly and other case study employers talked of homophobia in settings such as warehouses.

Few case study employers had developed strategies aimed specifically at addressing this barrier to making workplaces more LGB-friendly. One case study employer felt that that strong support for policies in relation to sexual orientation sent a clear message throughout the organisation and could therefore help compensate for LGB unfriendly wider environments [Charity2]. Another case study employer had promoted meetings of the LGB network within front-line services, as a way of reinforcing policy in this area as well as to promote the network [LA3].

3.6.3 Resistance to monitoring

Monitoring of staff by sexual orientation was a practice which a number of case study employers had adopted once they had initial policies in place and wanted to give more direction and backing to their work in this area. Monitoring is widely recognised as key to taking action in relation to sexual orientation because it can equip employers with necessary information on the number and position of LGB employees within the organisation. Therefore, stakeholder organisations interviewed for the research, including ACAS, regarded monitoring as a key step towards making workplaces more LGB-friendly.

This view was shared by employers who had been active in developing LGB policy and practice. The need for monitoring was also recognised by new arrivals to LGB actions: for example a charity felt that without monitoring information on sexual orientation it could not assess how gay-friendly the working environment was, since it did not know how many LGB staff were out at work, and how many were not [Charity1].

Monitoring of sexual orientation was viewed by some employers as problematic in a way that monitoring by other characteristics, such as gender and race was not. Some explained this with reference to sexual orientation as a 'personal' issue, which a number compared to the issue of monitoring by religious faith. Therefore, while they may have been monitoring staff by other characteristics for many years, they felt that monitoring by sexual orientation was in some ways problematic. A number of respondents said they had anticipated resistance, or at least a negative reaction to the introduction of monitoring by sexual orientation within their organisation. Reasons for this were largely a perceived sensitivity around the issue and a belief, particularly among some straight people that sexual orientation is a personal issue and irrelevant to employment. Some respondents also believed that some lesbian and gay employees did not want to be 'out' at work.

Case study employers had tried to overcome resistance by explaining the importance of monitoring, including by sexual orientation, and doing this through channels such as weekly communications and briefing. One measure which was found effective was a reminder by the chief executive to complete the monitoring form [Umbrella3]. One employer was determined to get a high response rate to questions about sexual orientation because '*if we didn't get a high return, it would be worse than useless*' described how staff were prepared for monitoring:

> '*We worked hard to prepare the ground, particularly on religion and sexuality as to the reasons why it was being done. We briefed*

people in team meetings and we spoke to people about why religion and sexuality were going into the public agenda. We developed various strap lines around it, you know 'sexuality is a public issue, sex is private', that sort of stuff. So people could think about why it was going public and we could knock on the head that thing about sex is for the bedroom and so why is suddenly coming into [the organisation's] office.' [Umbrella2]

This resulted in a return of more than 90 per cent with a high response rate to the question about sexual orientation. The response rate was used in presenting the findings back to staff, and this feedback included celebrating the diversity of sexual orientation within the organisation.

Some employers found that resistance to monitoring was less than anticipated and were relieved that it had not resulted in a 'negative backlash' [Housing1]. However, some case study employers had experienced resistance: a charity which was just starting to introduce LGB policies and practices found that, out of 700 staff, 184 said they preferred not to give their sexual orientation, and 14 staff said they were gay or lesbian [Charity2]. This was possibly explained by a lack of preparation for the question and the organisation's inexperience in addressing LGB issues.

One local authority [LA3] had been able to push monitoring forward because it had a strong LGB network, which regularly interacted with management. The LGB network was involved in discussions on whether monitoring should be conducted and how. The process took time, but resulted in effective monitoring, supported by LGB staff. The experiences of some case study employers which had been taking LGB actions for some time suggest that introducing monitoring and having it accepted by staff is not a one-off act and that there is a need to continually make the case for monitoring. The representative of a local authority where monitoring of staff had been in place for some time described it as an 'on-going battle' [LA1]. In another local authority, the need to convince staff, and to keep them convinced, of the need for monitoring was found to be strongest among staff in satellite offices where acceptance of organisational values in relation to equality and diversity are often weakest. [LA2]

3.6.4 Knowledge about the needs of LGB employees

Some case study employers appeared to lack knowledge about how best to proceed from introducing policies. One barrier appeared to be of knowledge and understanding of what LGB staff need to ensure equal opportunities at work. This appeared to result in a lack of confidence about what practices should be introduced. The representative of a large engineering company where almost no staff were openly gay, lesbian or bisexual felt that it lacked information on the perspectives and experiences of these employees and, was hoping to change this through analysis of responses of LGB staff in a company-wide satisfaction survey. The view that the needs of LGB staff are not necessarily well-known and understood was not confined to case study employers without an LGB staff forum and other involvement of LGB employees in policy and practice. We described earlier how the representative of a large local authority felt that

'It's really difficult to know what the hell the experience is of LGB people. We just haven't got the research, we haven't got the data.'
[LA1]

This problem had partly arisen because of a low response to monitoring and poor data on the perspectives and needs of LGB staff. It also highlights the importance of continual involvement of LGB staff in the development of policy and practice, and of upwards communication within organisations.

The existence of an active staff LGB forum appeared to play a very important role in ensuring that employers stayed on track in taking LGB actions. It was also important that the group itself retained momentum. In one case study employer, where policies and practices had been under development for some time, the group was described as losing enthusiasm and direction [Bank2]. Meanwhile, the company continued to attend LGB events but not always with the involvement of the staff group. This points to the potential for tension between actions by the organisation, and by LGB staff represented by networks. It highlights the need for both to work together as well as understand their separate roles.

3.6.5 Overcoming continuing barriers

The factors which enabled case study employers to continue developing LGB policies and practices included:

- having senior management commitment;
- having role models in senior and influential positions within the organisation;
- support of industry-wide networks as a check on progress;
- having an LGB network as a way into understanding employees' experiences and needs;
- regularly making the case for LGB equality;
- keeping a focus on LGB rather than subsuming sexual orientation within equality in general; and
- being aware of objections to LGB actions, and how these may take new forms.

Business benefits could be used to overcome barriers:

'... I always look at the client angle whenever I talk about diversity because it's very important and it keeps the attention of senior leaders.' [Bank1]

3.7 Active employers: maintaining momentum

We have described a number of the barriers experienced by employers, both in starting out to address LGB inequality and discrimination at work, and to progressing beyond the initial steps. Through employers' responses to questions about barriers to achieving LGB equality, and how they answered questions about how LGB-friendly they felt their organisations were, we

gained a strong sense of how much employers felt they had achieved in this area of equality and how much more work they needed to do. It was apparent that those employers who had taken most action were among those who felt they still had much to do to make their workplace LGB-friendly. The more complacent employers included those who had done very little beyond introducing a policy. As we have described, some of these believed their workplaces were gay-friendly, because they did not discriminate, would not tolerate homophobic bullying and were fair employers. Some of these employers did have an advantage of being in a more 'gay-friendly' sector, for example retail or in the third sector. However, others were not and it is likely that their confidence in their organisation's gay-friendliness was misplaced.

In case study employers which had made progress in relation to LGB policy and practice, one of the main reasons for lack of complacency was the lack of uniformity in acceptance and openness about sexual orientation throughout the organisation. There was an acute awareness that, however friendly head offices might be, branches and distant places of work might not have taken on board the culture of the central location. In some international companies there was concern about the welfare of LGB staff posted overseas where laws and attitudes were hostile to homosexuality. These problems were found to be difficult to resolve, and show the need for continual efforts to convey the importance of LGB policies and practices to all levels of an organisation. Another reason for lack of complacency among active case study employers was awareness that, for organisations to be LGB-friendly, employees must be out at work, yet employers were aware that many were not. While this is obviously a question of individual choice, employers who knew that a good proportion of LGB staff were not out at work interpreted this as an indication that the workplace was not LGB-friendly. This was not the view of employers who had not developed policies and practices on sexual orientation, who were inclined to view it as a personal matter, which they would not expect employees to disclose.

Employers who had made the most progress in developing LGB policies and practices were also aware of some potential areas in which their workplace was not LGB-friendly which were simply not considered by employers with less involvement. The issue of behaviour and staff interaction was raised by a number of case study employers. This included the existence of forms of behaviour among heterosexual employees towards lesbian and gay colleagues, in which they are treated as a 'soft touch' and their vulnerability within the workplace taken advance of [Umbrella1]. Another problem relating to the experience of lesbian and gay employees was identified in how LGB staff may interpret bad treatment and bullying as homophobia, where this might not be the perpetrator's intention. This raised the importance of understanding how LGB staff may experience poor behaviour within the workplace differently and how this can affect wellbeing.

Respondents in a number of case study employers who had achieved most progress in relation to LGB policies and practices either articulated the dangers of being complacent or were expressing this through their continual efforts to improve the environment for LGB employees and those who used the organisation's services or products. There was awareness within these organisations that the barriers to achieving this had changed in the last few

decades and even more recently. The representative of a large company explained that, since it began taking action on sexual orientation around 20 years ago, the nature of objections had changed.

> *'I think we've moved on hugely from the sort of old attitudes of 'It's political correctness gone mad'. That's faded into the past, but there are prevailing attitudes that minorities get some sort of better set of rights.' [Prodco3]*

An example was given earlier of how insinuations had been made within a case study employer that lesbian and gay staff had been favoured in recruitment and promotion [Housing1].

Even without a change in attitudes, the most active case study employers were aware that, with staff turnover and just with the passage of time, recognition of the importance of LGB policies and practices may diminish. Therefore, employees at all levels need reminding frequently of why sexual orientation is an equality area and of the need for action in this area. LGB networks were seen by the more active case study employers as keeping the issue of sexual orientation alive and therefore as important to support. In one case study employer the group had lost momentum, and, aware that competitor organisations had stronger networks, this employer was helping the group to re-generate, to have a stronger profile and more active involvement in the organisation's LGB work [Bank2].

Ensuring that monitoring is kept up to date and that the data collected is analysed was seen as important by some case study employers which had been taking LGB actions for some time. These employers did not see introducing monitoring and having it accepted by staff as a one-off event. Rather, they believed that they must continually make the case for monitoring. The representative of a local authority, where monitoring of staff had been in place for some time, described it as an 'on-going battle' [LA1]. The persistence of staff complaints about organisations' involvement in gay pride events was also viewed as a reminder by some employers of the need to continue to re-state the case for action in the area of LGB equality.

3.8   Key points

3.8.1 Starting out

- Employers' reasons for initiating LGB equality policies and practices included to improve equality and diversity across equality strands, and more specific aims such as to improve provision to lesbian and gay customers and service users. Some employers were keen to ensure they were meeting their legal and statutory responsibilities.

- Anticipated business benefits were important to some employers when initiating LGB equality actions. These included attracting talented employees from diverse groups. Employers were also concerned to ensure commitment of employees, through expressing respect for their sexual orientation and facilitating staff to be themselves at work.

- Some employers, particularly larger employers, wanted to be viewed as champions in the area of equality, including sexual orientation. There was evidence of a competitive spirit in some sectors, and between very large employers.

- LGB employee networks helped give momentum to policies and practices in some employers, as did having commitment from a senior LGB manager or straight manager with a strong commitment to equality.

3.8.2 Barriers to starting out

- Many employers did not anticipate barriers to taking LGB equality actions, because they already had a commitment to equality. However, some employers had anticipated objections from straight employees who did not see the relevance of sexual orientation to employment, with male dominated environments seen as most problematic in this respect.

- Some employers had anticipated concern from LGB staff who might feel 'exposed' by the new emphasis on sexual orientation. In reality, objections came only from heterosexual employees.

- Inertia was often more problematic than hostility, with commitment from senior managers and good communication helping to overcome this barrier.

- Some employers appeared nervous about addressing sexual orientation, feeling that they needed to progress in other, less 'difficult' areas of equality such as gender first. Employers also felt the need to explain to employees and managers why sexual orientation is a workplace issue, and found that this made a difference to acceptance of LGB equality actions. Some employers were nevertheless unclear themselves about exactly what they should be doing in this equality area.

- Costs were not seen as a barrier to developing policies and practices, and benefits were often seen to outweigh costs. However, because of the relatively low proportion of the workforce who are LGB, action in respect of other equality could be seen as more cost-effective.

- Employers who had taken no action, or who had only included sexual orientation in equality statements, felt there was no need to take LGB specific actions either because they believed they were already fair and inclusive or because they did not wish to give emphasis to sexual orientation. Some employers believed it to be a difficult and 'sensitive' issue.

3.8.3 Overcoming barriers

- Barriers to taking action and to achieving progress were overcome by having clear organisational commitment, support at senior level,

having an active LGB network and making a clear case to employees for action on sexual orientation.

- Staff objections to action on LGB equality sometimes increased as employers progressed, and particularly when they raised their public profile on sexual orientation issues. Objections also changed over time, for example taking a religious aspect, showing the need for continual restatement of policies.

- Barriers were hardest to overcome in peripheral sites and offices, and in relation to monitoring of sexual orientation, again requiring committed employers to restate their case. Employers where most work had been done on sexual orientation were most aware of the need for continual restatement of policies and review of practices.

4 Motivators and barriers to employers developing transgender-friendly workplaces

4.1 Introduction

There was little activity in relation to transgender in the employer case studies. Whilst around half (15) had an equal opportunities statement which mentioned transgender, few had developed policies and practices to support their statement. Very few respondents thought that their organisation had any transgender employees and few respondents had much expertise on transgender employment issues. Therefore, this chapter concentrates on motivators and barriers to take any action (and does not include motivators and barriers to continuing action, as in the previous chapter).

4.2 Motivators

According to the transgender and umbrella organisations interviewed, the most common motivator for developing policies and practices to make a workplace more trans-friendly was having an employee transitioning.

This was illustrated by a number of the case study employers, both through examples of action due to an employee transitioning [Bank2, Prodco1] and through case study employers giving the reason for their lack of action that they had never had a transgender employee [Umbrella1].

Case study employers which had taken action without the spur of a known transgender employee, tended to be organisations with a high commitment to equality and diversity and with a corresponding expertise and knowledge of the needs or benefits of such action. Development of trans policies and practices flowed from their other equality and diversity activities. For example,

- developing a greater involvement in diversity generally [Umbrella5];

- transgender action being seen as a natural extension of LGB activities [Umbrella5];

- using the Stonewall Workplace Equality Index (WEI) to benchmark LGB performance; although the WEI does not cover transgender, it prompted the organisation to recognise their lack of action on transgender [Umbrella5];

- revision of all equality and diversity strategies, resulting in recognition that too little had been done on transgender and so policies and practices were developed,

    'We referred to transgender before because of the, what are they called, the assignment regulations? We refer to it

> *but that was all, its just this is the piece of legislation now we've gone into it in a little more depth in the inclusivity strategy.' [Fire];* and

- inclusion of a representative from a transgender support organisation (Inner Enigma) on their Diversity Overview Group.

These case study employers also identified other prompts to action. Pressure from interested individuals, including the LGB network [Umbrella5] and diversity champions [Umbrella5] had prompted some case study employers to take action.

Legislation, both gender reassignment equality legislation [LA3; Bank2; Fire] and other equality legislation, had prompted action. As an example of the latter, the Employment Equality (Age) Regulations had prompted a Local Authority [LA2] to review their policies and practices in respect of all equality groups. However, the extent of action could be small (see previous quote).

Legislation alone might not prompt action, but, was important in tandem with an employee identifying themselves as trans,

> *'in 2004 when the Gender Recognition Act came into being was when the previous policy sort of took shape. … the story goes that suddenly [we] got [our] first applicant or first person saying I need to transition…So a policy was written…. I suspect that the actual Gender Recognition Act itself didn't spark the policy but what it did was it empowered that individual to then ask.' [Police]*

The importance of legislation was also illustrated by a company [Designco] which had taken no action. The organisation said that they would only take action if required by law. It also appeared they would be spurred to action if an employee took action against them.

Another spur to activity was a perceived greater visibility and recognition of transgender people. Recognition of the size of the trans community (who they serve) had prompted a Local Authority to action [LA3]. The Police saw the need for staff to learn more about transgender people, as transgender people's involvement in the criminal justice system affected their policing work,

> *'it's suddenly become visible and because the Police, unfortunately, deal more regularly than any other group I suppose with trans people in terms of trans sex workers or trans people as victims, people needed to know, they're desperate for the information. So I think there is a desire amongst a bigger proportion of the workforce to know what transgender is about.' [Police]*

One case study employer was prompted to action by its parent company which was progressive on transgender. In the case of Lawco2, their US parent prompted action. (However, there is no reason to assume US parent companies, in particular, will prompt action. Another of the case studies, Foodco1, with a US parent, had done nothing on trans and little on sexual orientation.)

The difficulties that Bank2 had in finding the right information led to it improve procedures and guidance, to document everything better.

As a final comment on motivators, the Police case study respondent thought that transgender had been easier to deal with than LGB because it was easier to convince the organisation of the business need and the moral need because it was described in medical terms and was then seen as a medical condition.

4.3 Barriers

The primary barriers to employers taking action to develop a more trans-friendly workplace seemed to be lack of thought given to gender identity issues, in general, and lack of recognition of it as an employment issue, in particular. As one transgender organisation put it, it is '*off the radar'.* This helps explain why the main motivator to action was having a (recognised) trans employee.

General barriers to implementing equality actions, as discussed in the previous chapter, also prevented action on trans issues. For example, Designco felt there was no need to develop equality policies and practices at all and that this would take people away from doing their design work.

Once trans issues have moved on to the radar, a range of other barriers can prevent it being taken up as an employment issue. These include:

- lack of perceived need, due to lack of recognition of any trans employees and due to the small size of the trans population;

- lack of knowledge of gender identity issues, legal requirements and appropriate actions; and

- hostility and fear towards transgender people generally, both from management and staff.

Each of these barriers is discussed separately below, although the barriers are interlinked. Together, they appear to lead to inaction, except where commitment to equality and diversity is already high or where the employer has a recognised trans employee. However, neither equality commitment or having a recognised trans employee appeared to guarantee action to make the workplace more trans-friendly [Foodco1].

4.3.1 'Off the radar'

As has been said, although half of the case study employers had equal opportunities statements covering transgender explicitly, few had taken specific actions.

A number of case study employers explicitly said that they did not think about transgender because the issue had never arisen [Lawco1; Umbrella5; Foodco2; Bank3].

> '*We have this Corporate Equalities Group that meets say monthly or every two months and we deal with suggestions and issues that have been brought forward. So the, I guess the group has been*

around for about a year. So we are still really trying to decide on our, on widening our mandate but I guess what I'm trying to say is at the moment we're pretty reactive. If somebody raises or brings a suggestion to that group it's heard in that group. So I think that group when it becomes more mature we will sort of start to look out and think okay how can we be more proactive.' [Umbrella1]

Lack of thought on the issue meant that other barriers had not arisen, so whether other types of barriers might come into play was not clear.

4.3.2 Lack of perceived need

The relatively low incidence of trans people (see Section 1.1), combined with their invisibility (which may be through fear or positive choice) and the conceptual (and self-identity) issue of whether someone who has transitioned continues to be trans, mean that employers do not do anything because they believe they have no trans employees.

'it still feels a bit theoretical in a way that the LGB side of things doesn't because it's real.' [Umbrella5]

'Well, what we tend to do there, because it's a very, very rare condition, and we've only had two examples…...about three or four years apart, and they've gone now anyway because they retired early. What we're likely to do, I think, is only worry about the issue if it ever hits us again, and then learn from our lessons over the last time, we don't consciously do anything with transgender people because we may not have any, we could well not have any with a smallish workforce. And so we would simply try and deal with any issues sympathetically should they arise in the future.' [Prodco1]

This approach, to deal with each case as it arose and not to develop a policy was apparent in many of the case study employers. The result appeared to be a lack of knowledge about the issues and how these might be addressed.

This lack of visible trans employees could reduce action in other ways too:

- one case study employer relied on people to champion equality issues and the lack of any trans employees meant that there was no-one to champion the issue [Umbrella5];

- another case study employer relied on its staff attitude survey to identify issues to address; they explained that, because there were so few staff who had identified themselves as trans on the survey, the findings were too unreliable to act on [Umbrella1].

Because of the small size of the trans population, the reliance on statistical interpretation of staff attitude surveys means that employers cannot identify whether there are problems and so may not take action. In these circumstances, it would be better if employers responded to any indication that trans employees were encountering problems, whether statistically valid or not.

The belief that those who have transitioned have moved on and would not welcome recognition of themselves as trans, was found to discourage action,

'with guidance we've had from Stonewall, what they've been saying is that the majority of people who perhaps are T don't necessarily want to focus on that because they're trying to move on and have their life in their new gender.' [Bank3]

At the same time, because there are few trans employees (and fewer who are identifiable) there appears to be little benefit to employers of taking action,

'I tend to look for where I can have the greatest effect most quickly, because everybody's jobs are pressurised these days… So I do see it as an important agenda and we will get to it but it's a case of we haven't got there yet to the extent that I want to be involved. [And so have focussed on gender, race, faith and ethnicity]' [Bank1]

Some saw it as a waste of resources except in response to an individual trans employee's needs [Prodco2]. In some cases, this led to a hierarchy of equality strands, with other strands being dealt with first [Foodco1; Bank3]. For example, on whether equal opportunity training covers trans, a case study employer said,

'I would imagine that we probably wouldn't expressly cover it. We'd mention it within the other groups but because we I think will plan diversity awareness training on, including females and ethnic minorities I would think that it would probably be too small an area to warrant a headline. And probably too small even to warrant a specific example though I would hope that each of the other three groups would and I think they will. But I don't know if ... that's rather on the basis that people will tend to react to things that are real, they know someone in the office and they think okay I need to make sure that there is fair treatment because everyone understands the principle but if there's no live example it's more, has the danger of making the training theoretical and as soon as the theoretical people turn off.' [Lawco1]

4.3.3 Lack of understanding and knowledge about policies and practices

The lack of need combined with a lack of understanding and lack of knowledge so that some respondents whose job covered diversity knew little or nothing around issues of transgender [Retailco1]. Certainly, many case study employers were ignorant of equality law issues, as exhibited by the case studies which said that trans people might use disabled toilets [Retailco1] or that they would not get time off for medical treatment.

Some difficulty was engendered by how to treat transgender generally, namely whether it should sit with LGB/sexual orientation, with gender or on its own. The case study employers which raised this as an issue did not place transgender with sexual orientation (exhibiting their greater knowledge of the issue), although, in practice, it was sometimes combined, particularly in LGB and T networks [LA2].

'in terms of transgender, if we have anybody who has become female then they have support with the UK women's network in any event.' [Bank3]

'when we talked to them about our LGB network, we talk about the T and the transsexual and they talk about transsexual being, if you like, coming under the heading of gender as opposed to sexual orientation so, therefore, we would feel by talking about not being discriminated against on the grounds of gender that that would incorporate the transsexual population.' [Bank3]

At the same time Bank3 did not feel that trans employees would be adequately covered by their gender policies and practices, e.g. they would be covered by their bullying and harassment policies, but specific needs would not be covered.

'I guess we haven't really identified it as a separate area in that sense. Maybe we would if anyone ever had raised an issue with it, or raised an issue in the future but I guess we would then have to consider it but until then my view is that, that we get this right for ... we get our policies right for the whole sphere of LGB and T, and there's so much overlap that, you know there's not that much we need to do specifically addressed towards transgender and transsexual issues that we don't cover by addressing LGB and T generally.' [Lawco2]

Case studies also had secondary knowledge issues about specific policies and practices, how transitioning should be treated in practice, monitoring and the law. The issues mentioned tended to be fairly basic such as which toilets to use (with several mentioning disabled toilets) and willingness or not to provide time off for medical treatment (which is required by law). This suggests very basic lack of trans knowledge and experience. Wider issues, such as how to manage and communicate had not been considered.

One case study respondent with substantial experience of LGB issues, could only speculate on some basic trans approaches, drawing parallels with LGB approaches,

'I can only imagine that it might be something similar for transsexual staff, in that they might want personal and individual support but not a whole raft of policy and practice and communications because it would probably make people feel uncomfortable.' [Bank1]

Fear of getting things wrong could compound reluctance to take action. For example, Umbrella5, which had experienced problems due to some mistakes in its disability policies and practices, said

'the fact that you stuck your head above the parapet wanting to make something more appropriate and to have a commitment does expose you and yeah that fear I think can sometimes be a bit debilitating … it can cause inertia.' [Umbrella5]

The Police case study respondent saw the issue as complex, compounding difficulties,

'Well colleagues themselves in my experience anyway is that they want to know the information. They want to know, they want actually to be told in black and white but of course you can't with

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transgender because its such a complex subject but they want to know in black and white what they should and shouldn't do in say for example custody situations. They also want to know in black and white whether their colleague who is transitioning can use the same toilet as them now that he is now a she and this sort of stuff. Again they want very black and white information and it's not always that easy but that's the sort of thing they want to know. And it's not always been plain sailing, it still isn't plain sailing with colleagues. One of the difficulties is always facilities, changing rooms and toilets.' [Police]

4.3.4 Reliance on other policies and practices

One case study employer felt no need to take action on transgender because they felt confident that other policies and practices and the general inclusive approach in their company would mean that there would be no problems,

> *'so if, if a transgender person joined one of our stores, I, I think that they would have a positive work experience and be actively accepted by that team and I think we have systems in place that if that wasn't the case then we would pick that up and I haven't picked any of that up. So I, I think that most of our people are great and we have a ... they would have a positive experience of work I would like to think so, yes.' [Retailco2]*

Although the validity of this view could not be verified, it seemed a risky approach.

4.3.5 Hostility towards and fear of transgender issues

The transgender organisations interviewed said that hostility and fear were major barriers to workplaces being more trans-friendly. This was not particularly apparent in the case study employer interviews. The examples of hostility were fairly mild, but we suspect this was more a result of the research method (with most interviews conducted with managers with responsibility for equality or human resources) and because the interviewees' organisation lacked experience of identified transgender employees.

One respondent said that taking LGB action was groundbreaking for their employer and that transgender was just too far [Bankco3]. Another said that, when two women underwent gender reassignment at Prodco1,

> *'it was a shock to their colleagues, as it is to family and friends when someone makes this kind of decision, and there was lots of debate about toilets.' [Prodco1]*

The issue of toilets was also raised by the Police respondent,

> *'There might be resentment about you know so and so using the same toilet as me and not looking very good as a woman or something you know but that's human nature isn't it really so but I think on the whole we are pretty successful and I'm finding that managers are usually very robust in managing situations around*

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transgender and they will always come and ask for advice which is good.' [Police]

In some cases, expected barriers did not materialise. For example, when the Police case study rewrote its trans policy to extend it from transsexuals to transgender, the trans lead had envisaged resistance from human resources (which had to agree the policy). This did not occur.

4.4 Key points

4.4.1 Motivators

The main motivator to taking action in respect of transgender was having an employee transitioning. However, this may result in actions focused on assisting an individual to transition, rather than making the workplace more trans-friendly generally.

Employers with a high commitment to equality and diversity may take steps to make their workplace more trans-friendly without the transitioning prompt. However, specific prompts included:

- reviews or development of equality and diversity policies covering other equality strands, including an extension of LGB activities;

- pressure from interested individuals (LGB network, diversity champions and transgender groups);

- legislation on gender reassignment;

- recognition of the trans community as customers, service users and facilitators of the employers' business;

- difficulties finding information when an employee transitioned; and

- benchmarking using the Stonewall Workplace Equality Index (WEI).

4.4.2 Barriers

The main barrier was lack of recognition of the issue in general and as a workplace issue, in particular.

Once transgender was recognised, the barriers were:

- lack of perceived need, due to lack of recognition of any trans employees and due to the small size of the trans population;

- lack of knowledge of gender identity issues, legal requirements and appropriate actions; and

- hostility and fear towards transgender people generally, both from management and staff.

5 Business benefits of LGB and T-friendly workplaces

5.1 Introduction

For many years governments have encouraged employers to take equality and diversity actions by emphasising their business benefits and business benefits were found to be a motivator to developing an LGB-friendly workplace in some of the case studies (Section 3.3.3). This chapter looks in more detail at the nature of the benefits which may be derived from making a workplace more LGB and T-friendly and the evidence on whether benefits are actually derived.

The nature of the evidence on the business benefits of equality and diversity varies. At one end, there is narrative information on specific types of benefits that are believed to be derived, based on expectations of how actions change behaviour (e.g. making a workplace more LGB and T-friendly improves morale and therefore improves retention and productivity). This indicates plausible effects, but does not prove these effects. This approach rarely takes into account negative effects (e.g. negative reactions of homophobic employees) or costs, which may outweigh benefits. In the middle is descriptive evidence which juxtaposes changes in equality and diversity policies and measured changes in outcomes (e.g. morale and turnover) and assumes that the changes are causal. This approach can (but may not) take into account negative effects, particularly those directly related to the effect. It may also not take into account costs. However, it cannot provide proof of causality. At the other end of the spectrum are quantitative studies of overall effects on productivity, morale and profits. These better address negative effects and costs, but despite their sophistication, rarely overcome the problem of proving causality.

The evidence is drawn from previous research, the case study employers and interviews with LGB and T organisations and other stakeholders. There is very little previous evidence on the business benefits of a LGB and T-friendly workplace and what there is is narrative or descriptive. The evidence from the case study employers and from the LGB and T organisations and other stakeholders is also narrative or descriptive. For assessing business benefits, it is important to take into account negative effects and so quantitative evidence needs to be considered. However, there are no robust, quantitative studies of the business effects of making workplaces more LGB and T-friendly and the case study employers could not provide such evidence. Because of this, we first look at the evidence on the business benefits of equality and diversity more generally, which may be used to inform a view on the business benefits of having a LGB and T-friendly workplace. Sections 5.3 and 5.4 turn to evidence relating to LGB and to trans respectively. Section 5.4.4 turns to costs. All the evidence is qualitative and, largely, narrative and it is important

to bear in mind the limitations of this approach. The final section draws out conclusions.

5.2   Robust evidence on the business benefits of equality and diversity

Many employers at the forefront of improving equality and diversity point to business benefits they have derived (Dickens 1999). However, robust research evidence of business benefits is limited, due to lack of data and methodological difficulties. The consequence is that most 'evidence' is highly descriptive and fails to identify causality or costs. This does not mean that there are no business benefits, just that they have not been proven.

Much of the more robust evidence relates to gender equality, due to better availability of data (see, for example, Dex, Smith and Winter, 2001; Gray, 200; Forth and Rincon, 2007). Much of this considers family-friendly policies and practices, which have their own peculiar costs and benefits. At the same time, findings are mixed. Research examining a wider range of equality policies also has mixed results (Pérotin and Robinson, 2000; Riley, Metcalf and Forth, 2009).

A consequence of being LGB and T-friendly may be a more diverse workforce. It is argued that this brings benefits. The general evidence on the impact of diversity on the workplace is mixed, showing not only greater access to different perspectives and sources of knowledge, a greater understanding of diverse groups of potential and existing customers, better communication with diverse groups of potential and existing customers and improved legitimacy among a wider audience, but also increased conflict among the workforce, poorer internal communication and increased management costs (Anderson and Metcalf) .

However, most of the robust evidence is based on quantitative data. This has its own limitations, including that, if benefits are derived in certain circumstances only, these may not be identified. Dickens (2005) suggests this is the case, that the business case for equality and diversity depends on organisational circumstances. For example, equal opportunities may increase the labour supply and skills, but this is of no benefit where the labour supply was already adequate. The emphasis on morale may be of relevance to all, but may not be to those who practice tough forms of human resource management. Ultimately, in some circumstances, discrimination may enable to employers to reduce labour costs. The implication of this is that, although the body of quantitative evidence does not definitively support the contention that equality and diversity result in business benefits, it is likely that there are benefits to some employers and that the benefits argument should relate to the circumstances of the organisation.

Other evidence which indirectly supports the arguments of equality and diversity leading to business benefits is the management literature on employee commitment and morale (see, for example, Lee, Carswell and Allen, 2000; Judge *et al.*, 2001: Meyer *et al*, 2002, Rhoades and Eisenberger, 2002; Riketta, 2002; Thorsteinson, 2003; Wright and Bonett, 2002). This identifies a link between higher commitment and morale to:

- lower levels of stress and psychosomatic illness and increased psychological well-being;

- lower absenteeism;

- lower staff turnover;

- fewer grievances; and

- higher job performance, increased work quality and greater 'organisational citizenship' (extra-role behaviours).

Other than the quantitative evidence relating directly to productivity and profitability, the literature tends to ignore any costs of equity and diversity. These include costs of developing and implementing policies, and costs due to resistance from other staff (e.g. non-parents objecting to flexible working for parents; a straight, white male backlash) (Foster and Harris, 2005; Kaplan, 2006). These costs are difficult to measure, but should not be entirely ignored in considering the business case (and are unlikely to be ignored by employers). Moreover, the costs and benefits may occur at different times, with benefits appearing longer-term (Humphries and Rubery, 1995).

5.3 Business benefits of developing a LGB-friendly workplace

The following describes the business benefits of developing a LGB-friendly workplaces identified in the literature (research reports and stakeholder literature), by LGB organisations and other stakeholders and by the case study employers. It should be borne in mind that each employers' ability to derive these benefits depends on their circumstances, as discussed above.

Benefits fall into two main types: effects on employees and effects on the quality and nature of the business. These are discussed in turn below, followed by other identified benefits.

Much of the evidence is based on employers' beliefs, rather than proven benefits, although, particularly in respect of employee effects, in some cases, corroborating evidence was found through employee data, including staff attitude surveys.

5.3.1 Benefits related to employees

Three types of business benefits relating to employees were identified. The first, was that it improved recruitment (that being seen as LGB-friendly widened the pool of recruits). This improved the quality of staff and hence productivity. The second was due to the impact of enabling LGB staff to be themselves and raising their morale and commitment, which, In combination, were thought to improve employee effectiveness, productivity and retention.

Recruitment
Being able to draw recruits from across the whole workforce is an argument for being LGB-friendly. For example, Stonewall (2007) reported Life Long Learning UK (a government agency) saying,

> 'Lesbian, gay and bisexual people comprise around 6 per cent of the UK population, according to government estimates. That's

roughly 3.6 million people, or 1.7 million in the UK workforce. The arguments for ensuring your organisation's diversity policies and practices include lesbian, gay and bisexual (LGB) people have never been stronger. By 2011, only 18 per cent of the UK workforce will be white, male, not disabled, under 35 and heterosexual. Many progressive employers are now recognising that they need to draw on talent from all sections of the population and create a workforce culture that embraces diversity and equality.'

LGB employees report that their decision to apply for jobs is affected by their expectation that an organisation is LGB-friendly (Guasp and Balfour, 2008).

Pinsent Masons, a major law firm, believe that

'Our people are our greatest resource. So we actively seek out not only people with first-class legal and business expertise, but those whose ability is matched with character, communication skills and enthusiasm.'

They see their work on making their firm LGB-friendly has helped attract and retain the very best people (Foster, 2008). The converse was described by Lt Cdr Craig Jones, an out gay former Navy officer, referring to the Armed Forces' previous ban on LGB recruitment,

' It had a terrible impact on all involved. For the Armed Forces, well, they lost a huge number of talented men and women who were too afraid to sign up, but who could have really made a difference.' (Insua, undated)*.*

Many of the case study employers believed that developing a LGB-friendly workplace improved recruitment [Police; Lawco1; Umbrella5; LA3; Bank2; Umbrella1; Bank3; Lawco2]. However, this belief could be based on hope rather than evidence,

'there must be a positive spin off from that if they can see that we are a different beast then how we used to be. So we must be getting better people I would hope anyway that are more representative.' [Police]

It was important that potential applicants were aware that the employers were LGB-friendly and some of the case study employers described involvement in Stonewall as achieving this. Joining Stonewall's Diversity Champions was one approach [Bank1; Lawco1], as was sponsoring a Stonewall publication [Lawco1].

'Frankly it's very cost effective but we felt that it was a very simple way to reach out to people and put our name on the map and say this is what we stand for. At that point there were remarkably few law firms that were doing that so we thought it was the right thing to do. I still think it's the right thing to do.' [Lawco1]

'We've had people come in as summer associates and as trainees I think coming in that have self identified but I don't know whether they wouldn't have done that if we hadn't got a name with Stonewall … we've certainly seen benefits and we've certainly

seen more openness with recruiting but whether that's Stonewall driven or because we're signed up to the commitment or whether it's something that is a natural evolution of people being more confident with super, with more rights [unclear-33.10] I couldn't tell you.' [Lawco1]

Other case study employers had received feedback from recruits (who were LGB) that they had been attracted to apply because of the employer was a Stonewall Diversity Champion [Bank1] or because of the employer's LGB image [Umbrella5].

The mechanisms for advertising a workplace to be LGB-friendly were not investigated in detail, but these approaches (rather than merely placing a LGB-friendly statement on advertisements) might be more appropriate for employers which recruit nationally.

The recruitment effects of being LGB-friendly was not always believed to be confined to widening the pool of LGB applicants. Bank1 thought that their LGB profile might also attract women, as it would be seen as an indicator of equality.

Morale, commitment and being one's self

Much of the evidence on the business benefits of being LGB-friendly relates to the effect on LGB employees being able to be themselves, their morale and their commitment. These factors interact and are believed to improve employee effectiveness, reduce absenteeism and sickness, improve productivity and raise retention. The evidence tends to rely on the assumption that morale improves productivity, evidence for which is referred to in Section 5.2.

Previous research has found that LGB employees feel that in a LGB-friendly workplace where they are able to be open about their sexual orientation at work means they could be themselves fully at work (Guasp and Balfour, 2008). They did not need to be constantly wary about revealing their home life and sexual orientation, including in the most casual and minor conversations. They reported that this resulted in:[10]

- increased motivation;

- increased work effort;

- improved concentration;

- increased confidence, affecting not only day to day performance, but also willingness to present new ideas and to take risks;

- reduced stress and exhaustion;

and, ultimately, increased efficiency and productivity (Guasp and Balfour, 2008; Colgan *et al.*, 2007). Unison (2003) argues that the reduced stress will result in less sickness and absence, as well as higher productivity.

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[10] Based on self-reporting in focus groups of 107 LGB staff from 21 organisations.

The ability to be oneself fully at work described above, was also reported by LGB employees to improve their ability:

- to communicate and build relationships with colleagues; and

- to communicate and build relationships with clients (Guasp and Balfour, 2008).

This could occur through general chat and socialising at work and also through ability to participate in out of work activities. This should enhance teamworking and relationships with clients and so result in better work effectiveness.

Moreover, in LGB-unfriendly workplaces, other employees may exclude known LGB employees, e.g. refusal to speak to or exclusion from meetings (Guasp and Balfour, 2008).

The themes of comfort, commitment and engagement were taken taken up by many of the case study employers [Police; Lawco1; Umbrella5; Umbrella1; Bank3; Lawco2; LA3; Bank1].

One decribed his own views and experience, as a gay man,

> *'If your employer (and I know some bad ones) excluded you persistently or asked you to remain in the closet … then you're not gonna be of your best or giving your best. So if you've got an employer that's actually keen to hear from you and wants you to be counted well its not rocket science is it really? I know where I'd go.'* [Police]

Another said,

> *'if you don't feel included where you work it's almost impossible really to feel highly engaged in the organisation.'* [Retailco2]

The effect of a workplace being LGB-unfriendly was described by Prodco1,

> *'Yeah, if they're made to feel uncomfortable. In fact, you could argue that if you're not allowed to be yourself at work, you're lying about what you did on the weekend, that could affect your work output as well. Because I can talk about what I did with the wife and kids on the weekend and nobody turns a hair. A homosexual person wouldn't be so inclined to talk about their partner and what they did on the weekend because of fear of ridicule.'* [Prodco1]

The importance of formal support was identified by one respondent,

> *'that's the key, it's making people feel comfortable and I think having something that's formally sanctioned, formally supported by the firm is a tangible and clear statement that the firm has made that people in these groups should not be concerned and they will be supported and if they feel that they aren't supported there is redress. And not just redress the law, softer redress as well in terms of making something actually happen within the firm. And I've never felt that anyone has been treated in a way that wasn't in a way that I thought they should be treated. And no-one's certainly no-one's ever come to me and said I'm concerned.'* [Lawco1]

In some cases, the effects were identified through staff attitude surveys, showing that LGB employees felt included and supported [Umbrella5] or that they were proud of their employer [LA3].

The business benefits of inclusion and being able to be oneself identified by the case study employers were:

- better employee relations [Bank3];

- higher productivity [Bank2; Lawco2; Umbrella1];

- better customer service [Retailco2]; and

- reduced absence/sickness [Lawco2; Umbrella1; Retailco2] .

As one gay respondent put it,

> *I am now far more productive and committed to what I'm doing than I was earlier, in my early days, because I do feel valued and I think that's a key thing is feeling valued for who you are. [Police]*

The productivity benefits of inclusion were not seen as restricted to the productivity of LGB employees,

> *'We would like to say that we believe if we address these issues and we help those people feel comfortable enough to be themselves at work and give us their best then we should see productivity in that area and also in the, the whole team around it. So in terms of inclusion and employee engagement, we believe there is a good business case for that. If you're asking me what pound signs we, we don't track that at the moment.' [Retailco2]*

Being able to be oneself and to feel valued was reported to increase retention (Guasp and Balfour, 2008; Colgan *et al.*, 2007). As Stephen Golden, Executive Director, Office of Global Leadership and Diversity, Goldman Sachs said,

> *'Employers recognise the value of an inclusive environment. There is a clear business case for encouraging your employees to feel comfortable in the workplace, and retaining lesbian and gay staff long term.'* (Insua, undated)

Inclusion and morale effects were perceived by the case study employers as affecting retention [Umbrella5; Umbrella1; Bank3; Lawco2],

> *'when people can be themselves at work I think you get the best out of them and without a doubt if somebody feels included in their workplace and safe then first of all they're gonna join that organisation because they know that they've got a champion and secondly they are going to try to progress in the organisation and stay.' [Police]*

However, retention illustrated how potential benefits varied with an organisation's circumstances. Two of the case study employers with very low turnover did not see increased retention as a benefit [Fire; LA3], whilst Prodco1 felt that lack alternative jobs for their skilled workers meant that the workplace being LGB-friendly did not affect retention.

Deployment

One further effect identified in the literature was that employers can more effectively use their workforce where sexual orientation does not affect deployment.

Guasp and Balfour (2008) identify this in respect of promotion. This may be due to lack of discrimination or, where networking is important for promotion, the employee being able to be open about their sexual orientation and so able to socialise and network more effectively.

Aggregate effects of recruitment and retention benefits

Improvement in recruitment and retention together were believed to improve the quality of employees: to result in the '*best talent'* [Bank1; Umbrella1] and to reduce recruitment and training costs (Unison, 2003).

Corroborating evidence of the effectiveness of policies was given by IBM (which has been prominent in making the organisation more LGB-friendly): the number of LGB executives had increased by 733 per cent since 1995 (Thomas, 2004).

5.3.2   Business/service/finance

As well as the effect on productivity and service quality, being LGB-friendly was believed to affect sales (or funding) and the quality of the service provided. In part, this was seen as due to a greater willingness of gay customers to buy from known LGB-friendly companies, in part, due to purchasers (in the public sector) and funders (for the charitable sector) demanding that its suppliers were LGB-friendly and, in part, to an LGB-friendly employer being better able to serve the LGB community.

Attractiveness to customers

It is argued that LGB-friendly workplaces can increase market opportunities through tapping into the pink pound. This may be through LGB people being more willing to purchase form LGB-friendly organisations, or through specialist development of products and services for LGB people.

> *'it means that we are tapping into a market which is very fussy about the credentials of the organisations that they work with. And I know that myself in that as a customer I will not support any business which is not overtly positive about LGB. Not when you're talking about businesses that you are very closely aligned to, like a bank, for example. So I think it wins us clients. It wins us business.'* [Bank1]

Certainly, the potential size of the pink pound is used to encourage employers to be more LGB-friendly. For example,

> *'Britain´s 3 million gay and lesbian citizens earned over £70 billion last year. Coupled with the fact that gay and lesbian households have fewer children, this community have a greater disposable income to spend. Therefore there is a clear business case for organisations to welcome and encourage customers regardless of sexual orientation.*

'Businesses have much to gain by opening their doors to the gay, lesbian and bisexual community: it makes good business sense to have a range of clientele as diverse as society itself. Embracing diversity and promoting equality of opportunity will only serve to welcome and encourage more customers.' (Equality Commission for Northern Ireland, 2010)

The analysis shows that the internal variety, made up of different skills, competencies, cultural orientation, and personal sensibility, is mainly used to better interact with the markets and to produce customised products.

Examples of organisations reporting this as a benefit were found in the literature. For example, IBM has a LGB Sales and Talent Team which was described as having made '*significant marketplace initiatives'* (Lubensky *et al.*, 2004, p218; Thomas, 2004).

None of the case study employers identified benefits in terms of product development. Bank1 explicitly stated this was not the case (not seeing LGB people as having different banking needs). However, sales benefits were believed to occur for a number of reasons, including

- better knowledge and treatment of LGB customers [Lawco2], for example,

   '[the LGB network] in developing the awareness of client-facing staff of the unique nature of LGB clients. I provide personal advice to bankers on how to manage LGB clients. There's nothing more irritating to a gay customer than having a private banker, for example, who really struggles to utter the word 'gay' without putting his hand over his mouth or isn't quite confident enough to say ... when he has to ask the client if they're in a civil partnership, not having the confidence to say, 'Fantastic. When did you get married? Where did you go?' [Bank1] ; and

- raising the company profile through networking with LGB potential customers [Lawco2].

In some cases, benefits were believed to be developing, rather than to have been realised. For example, Lawco1 considered that a network it had established was helping to raise its profile with certain business customers and that business was likely to develop in the future.

Service provision
In the public sector, diversity can be seen as enabling the organisation to better serve a diverse community, providing a wider range of insights appropriate to a diverse community (Colgan *et al.*, 2009; Insua, undated). For example, Sheffield City Council said,

   'In the city council, we have needed to employ registrars, who must be trained to understand sexual orientation issues. This has had a very positive effect as it has raised awareness so much. People have to learn to be more ambiguous, or inclusive, so that nobody is offended'. Insua (undated)*.*

Examples were found of this in the case study employers, with a LGB-friendly workplace resulting in,

- improved engagement with the LGB public and improved ability to clear up crime (Police),

> *'One of the areas that has benefited enormously are, is investigating serious crime. We have had some fantastic results in terms of investigating homicides, LGB homicides … And, as a result of having them on board with us from the word go, our media campaigns are more successful, we're not saying the wrong words anymore, offending people but we have actually, I believe we have actually got to a point where we'll have people come and give us intelligence where they wouldn't have done in the past. So that's a very huge change for us and a tremendous one for the community.' [Police]*;

- LGB community feeling included in all the Council's activities [LA3];

- trust of the LGB community [Fire]; and

- better understanding of and ability to meet the needs of LGB customers [Umbrella5; LA2; Fire].

The police sought to develop these benefits by combining its operational and its human resource training. Greater awareness and sensitivity was seen as improving trust in the police and therefore the police's ability to provide a better service to the LGB community.

However, one public sector organisation said that because they were not directly serving the public (but serviced other public sector organisations) that having LGB policies did not affect the service it provided [Umbrella1].

Procurement and funding requirements
Corporate, as well as individual, customers may demand suppliers are LGB-friendly or at least evidence of seeking to achieve this, as part of their purchasing criteria.

One case study employer described how a major corporate client was emphasising LGB action

> *'I knew that other law firms had been contacted by clients and asked the question what are you doing in this area. Specifically JP Morgan … went through the amount of fees that JP Morgan spends on lawyers in London and … contacted the top 10 by fee spend and said to them what are you doing, do you have a diversity policy, what are you doing the area of LGB.' [Lawco2]*

Charitable case study employers described how some of their funders sought LGB action.

At the same time, some of the case study employers themselves included LGB equality in their procurement [LA3]. Some felt that, the better they themselves were, the more they could demand of their suppliers [MCC; Umbrella5; Fire]

> *'as part of tenders, you will be required to submit your equal opportunities policy and what we, in effect, say is that your policy must be as good as our policy if we're going to work with you.' [LA3]*

This organisation did reject some organisations whose policies they deemed inadequate. This type of approach can be criticised for not going far enough (paper policies may not mean effective approaches) and this organisation was looking at how to strengthen their approach.

5.3.3 Other benefits

Wider considerations

A number of wider considerations were mentioned by the case study employers as benefits of developing a LGB-friendly workplace, in respect of image and ethical or political considerations.

- Image

  A number of case study employers saw projecting a good image as important. This included:

  - o charities, which felt it was right that they were seen to be LGB-friendly;

  - o private sector employers for whom a competitiveness over their equal opportunities image had developed; and

  - o public and third sector employers where diversity was part of the aims of the business and so they felt the need to be seen to be good themselves [Umbrella5].

- Ethical or political desire to reflect the community [Umbrella5].

Tribunal costs

Avoidance of tribunal cases, with their concomitant costs and damage to reputation has been reported as a business benefits of a LGB-friendly workplace (Unison, 2003). This was identified as a benefits in some of the case study employers [Bank3; Lawco2].

5.4 Business benefits of developing a trans-friendly workplace

The lack of knowledge and experience of transgender issues and employees amongst case study employer respondents meant that case study employers were less able to identify business benefits of being trans-friendly. Some assumed these would be the same as for being LGB-friendly, but, in few cases had they given thought to this issue. However, others did discuss trans specifically.

5.4.1 Business benefits related to employees

The employee-related business benefits described by most case study employers were the morale and commitment of the trans employee, with this improving employee engagement, commitment, productivity and retention [Police; Prodco2].

Recruitment, i.e. increasing the pool of talented applicants, was not seen by many case study employers as a business benefit, owing to the size of the transgender population. The exceptions included a large company with high skill demands [Prodco2].

'And I know talking to trans colleagues, I've actually had trans colleagues tell me that they view the [name] Police Service as an employer of choice because first of all they are recruited but sometimes we actively recruit you know by putting trans officers or PCSO's at recruitment fairs so they're visibly trying to you know say its okay to be trans in the [name of Police Service].' [Police]

Another saw the recruitment benefits as somewhat wider,

'Irrespective of whether trans people are attracted, the message that the organisation celebrates and protects individuality will increase recruitment.' [Umbrella5]

5.4.2 Business/service/finance

Only one case study employer [Police] described sales or service benefits. This related to their ability to serve and police the trans population. It was unclear the extent and to which this related to being a more trans-friendly employer or to their outreach work in the trans community, although it might be expected that the two went hand-in-hand.

5.4.3 Litigation

Reducing the likelihood and success of litigation against the employer was seen as a benefit of taking steps to be more trans-friendly [Police].

5.4.4 Comment

The size of the trans population community seems to limit the potential for realising business benefits, except where the organisation feels it has special need of transgender expertise or acceptance. This meant that perceived business benefits are likely to relate to individual trans employees, rather than to the sales and service side, and to be limited to the morale of the trans employee and those around that employee. Other benefits may be found by organisations with need for trans expertise of acceptance. They may also be realisable by large employers with extensive skill (or talent) shortages, where the costs of a small improvement in recruitment is low, due to economies of scale.

5.5 Costs

Costs have already been touched on as a barrier to starting to develop a LGB-friendly workplace (Section 3.4.5). This section looks at all costs, both initial and continuing.

While some costs of taking LGB and T actions are clearly difficult to itemise and separate out from either equality work in general or from organisational operations, it was perhaps surprising that many respondents did not seem to recognise the cost of some actions.

Where costs were recognised, they were often seen as very minor [Prodco1; LA3; Bank2], although set up costs (including training, subscriptions,

conference costs, development) could be seen as higher [Umbrella1]. This and the general lack of recognition of costs, suggests that cost were not high.

Only in one case were costs reported as affecting activities. Umbrella5 said that the additional recruitment advertising costs meant that they did not do as much as they might wish (and because they wish to do this in the ethnic minority and disabled press). However, the fact that some case study employers reported prioritising their work across strands (with LGB and T taking second (or later) place) indicates that costs constrained action.

5.5.1 Costs of general development and implementation: LGB

Awareness of general costs of policy development and implementation, such as equality specialists' and employees' time varied. At most, respondents reported costs in relation to expenditure and specialists' time. None mentioned other employees' time.

Some did not seem to consider policy development and implementation had any cost [Lawco2; Fire].

> *'it is a question of policies and attitudes and they don't cost anything financially.' [Lawco2]*

A number of respondents stated that there is no cost to having words in a policy and that the work they had done had been to make existing policies more inclusive. This was neither seen as time-consuming nor costly.

In case study employers with existing structures for equality and diversity, including equality units and staff with specific responsibility, cost was sometimes disregarded, since including LGB actions were considered part of the organisation's work and could not be separated from other equality actions. Therefore a number of respondents talked of the costs in terms of being 'hidden' within other equality work or impossible to separate out from other equality actions. This did not necessarily mean that costs were not recognised: one local authority pointed out that costs were distributed across the organisation because equality, including by sexual orientation, were built into its work across all service areas [LA1].. Another, with a diversity budget recognised some costs, but could not relate this explicitly to LGB and T [Retailco2]. The representative of a large company argued that, since most of the change to the organisation had been to its culture, this was not possible to measure in terms of cost [Prodco3].

In some cases the lack of recognition of costs may have been a result of either the emphasis the organisation placed on assessing the costs and benefits of activities generally or the remit of the respondent. For example, one respondent now that responsibilities had been devolved from their specialist unit to the whole of human resources now saw costs as negligible [LA3]

Others were aware that everything they did had a cost [Prodco2] and some specific costs of policy development and implementation were identified:

- developing policies [Bank1];
- implementing and communicating policies [Umbrella5];

- keeping policies up to date [Bank2]; and

- training [Prodco2; Bank2; Bank1; Umbrella1], although some only recognised such costs when they involved external trainers [Fire].

5.5.2 Costs of specific actions: LGB

Costs of specific actions were more often recognised, perhaps because they entailed accounted for expenditure. With the exception of monitoring, costs of employees' (specialists') time was not mentioned.

Some respondents were able to list the costs they had incurred through taking action over sexual orientation, while others could not because these were 'hidden' within equality expenditure.

> *'you've got … monitoring [costs] (but that's presumably you're monitoring across the equality strand so that's not sexual orientation)….Yes it's all internal ... we're using a system which we already have. So hopefully there won't be any, apart from general overhead costs there won't be any other costs to it.' [Lawco1]*

Where specific costs were identified, these included the following:

- training delivered by external providers;

- setting up mentoring for LGB staff [Bank1];

- time off for civil partnership, care leave for same-sex partners [Umbrella5];

- additional recruitment advertising e.g. in the gay press, jobs fairs [Umbrella5; LA3];

- LGB support group/network budget [LA2; Prodco2; Bank2; Bank3]. This may include giving people time off for network activities [Bank2];

- membership of LGB support organisations, for example the Stonewall Diversity Champions Programme [Prodco1; LA3; Prodco2; Bank1; Umbrella1; Lawco2];

- sponsorship of LGB events [Umbrella5]; and

- donations and subscriptions to LGB organisations [Umbrella5; Bank1].

Some of these costs could be calculated and some case study employers had specific budgets for some of these areas. However, the costs associated with some LGB actions were either difficult or impossible to measure, for example care leave for same sex partners.

5.5.3 Costs of specific actions: transgender

As with benefits, case study employers tended not to have thought about costs of making their workplace more trans-friendly and, few had had actual experience of costs (since they had not taken any action).

One case study employer, who had employed trans employees, believed there were no costs [Bank2]. Another distinguished between policy changes (which were seen as cost free) and certain practices (which were not). The costs identified by case studies were:

- sick leave (for medical treatment) [LA3; Police];

- washing facilities [Police]; and

- sponsoring a trans organisation [Bank1].

The way in which costs were thought about (or not) is apparent from the following quote,

> *'Well again it doesn't sort of cost anything to change policy or write words. I suppose the immediate cost that springs to mind would be obviously transsexuals who are transitioning and need time off for [medical treatment]. I suppose there's a cost to the organisation in terms of sick leave. Potentially you could say I suppose in the new Police stations that we're building,…we did engage with the architects … to ensure that they had single shower facilities specifically for trans people but anybody could use them you know there might someone whose just had a mastectomy or something who doesn't want to shower in front of everybody and so there is a benefit for anyone but perhaps you could say that was a cost that they wouldn't have ordinarily considered. But really and truthfully the costs are minimal compared to if you get it wrong.' [Police]*

5.5.4 Relative costs and benefits

Several respondents felt that, while there had been costs to work in this area, the benefits outweighed the expenditure. Reasons for this included the benefits to the profile and reputation of the organisation of having LGB policies and practices for employees and the community:

> *'It costs us something to run jobs fairs. It costs us something to do advertisements. It costs us something to be part of the diversity champion scheme, but ultimately we like to think that there's an economic comeback on that in terms of the image of the city so I don't think it's excessive in terms of investment.' [LA3]*

Another respondent believed that actions taken in this area had helped to prevent legal action from employees:

> *'The costs are minimal really. I mean the cost of monitoring was obviously quite a significant one, I'm sure my colleagues in HR would say, but it doesn't cost anything to change the words in a policy and I think, if we hadn't, the cost would have been employment tribunals from LGB people.' [Police]*

This same point was made by the representative of a law firm:

> *'The only cost that we have that specifically relates to the LGB area is membership of the Stonewall Diversity Champions Programme and we don't have big budgets allocated to sponsoring events and that kind of thing so it is a question of policies and attitudes and*

they don't cost anything financially. I think our view is that if we didn't have them in place, we'd potentially have significant costs and it is a cost saving to have them…. If hypothetically we didn't have any policies in place, situations could arise where you might have a harassment claim or a discrimination claim.' [Lawco2]

However, for some, the relative benefits of work related to other equality strands was seen as greater and so could lead to LGB actions being neglected.

'Ethically, we ought to do it, if we're trying to get the best people we can, well, they're not always straight, so we want to try and make ourselves attractive as employers to LBGT people. But we also have to keep a sense of proportion. There are so few, even by the Government's own statistics, so few adults that are LGB and T that it's a small population to tap into. Whereas the female population is about half of the working population anyway, and there's a much bigger potential there for us to dip into that pond and get more fish out of it than there would be … than there'll ever be with the LGB and T population.' [Prodco1]

5.6   Key points

There is very little robust evidence of the business benefits of making a workplace LGB and T-friendly. This demonstrates a dearth of research into the issue, as well as the difficulties of providing evidence. It does not mean that there are no business benefits. Certainly, employers, LGB and T organisations and other stakeholders believe there are business benefits and these claims appear plausible.

5.6.1 Benefits: LGB

- Employees
  - o recruitment : being able to draw from a wider pool;
  - o improved morale, commitment and being able to be oneself, resulting in increased work motivation and effort, reduced stress and exhaustion, reduced absence/sickness, better employee relations, higher retention and, ultimately, increased efficiency, productivity and customer service;
  - o improved deployment; and
  - o 'best talent'.
- Business/service/finance
  - o attractiveness to customers: the pink pound, improved knowledge of any LGB-specific needs and making contacts through LGB networks;
  - o service provision: improved engagement with the LGB community, recognition of their needs and building trust and co-operation; and

o meeting customers' procurement and funding equality requirements.

- Wider considerations

   o image: ethical, competitive on equalities, part of their aims;

   o ethical or political desire to reflect the community [Umbrella5]; and

   o avoidance of tribunal costs and damage to reputation.

5.6.2 Benefits: transgender

The size of the trans population community seems to limit the potential for realising business benefits, except:

- where the organisation has a special need of transgender expertise or acceptance;

- avoidance of litigation; and, possibly,

- recruitment for large employers with extensive skill (or talent) shortages.

Recruitment benefits were unlikely for other owing to the size of the transgender population.

Otherwise, the business benefits are likely to relate to individual trans employees and to be limited to the morale of the trans employee and those around that employee:

- morale and commitment of the trans employee: improving employee engagement, commitment, productivity and retention.

5.6.3 Costs

There is a lack of evidence of the costs of making workplaces more LGB and T-friendly. Case study employer respondents reported costs as low. General policy development and implementation costs, which were part of general equality budgets were given little consideration. At the same time, limited staff resources affected the work undertaken. Respondents were more aware of external expenditure (payments for LGB and T organisation membership, donations, external training and consultancy).

LGB costs
Specific costs mentioned included:

- training delivered by external providers;

- setting up mentoring for LGB staff;

- time off for civil partnership, care leave for same-sex partners;

- additional recruitment advertising e.g. in the gay press, jobs fairs;

- LGB support group/network budget, including time off for network activities;

- membership of LGB support organisations;

- sponsorship of LGB events; and

- donations and subscriptions to LGB organisations.

Trans costs

Specific costs mentioned included:

- sick leave (for medical treatment);

- washing facilities; and

- sponsoring a trans organisation.

5.6.4 Relative costs and benefits

Case study employers, LGB and T organisations and other stakeholders which had taken action believed that the business benefits outweighed the costs. However, there is too little robust evidence on either costs or benefits to be able to demonstrate this.

Better evidence of net benefits would be useful. Some case study employers indicated resource constraints and LGB action taking second (or lower) place to other equality strands. If, indeed, there are net benefits to making the workplace more LGB and T-friendly, then this should be able to be used to convince senior staff to reduce resource constraints.

6 Support for employers

6.1 Introduction

In developing LGB and T-friendly workplaces, employers may need expert information, advice and assistance and one of the aims of the study was to investigate the adequacy of support for employers. Case study employers were asked about the support they used, its adequacy and gaps in support. This was also discussed with LGB and T and stakeholder organisations. The main sources of support for employers was identified through a websearch and from the provision described by case study employers and LGB and T and stakeholder organisations.

Many of the case study employers were selected because they were Stonewall Diversity Champions and so Stonewall featured as a major provider of support to the case study employers. Information on support needs of others was gained from the six case study employers which were not involved with Stonewall and from the stakeholder organisations.

6.2 Providers of LGB and T support to employers

There is a large number of LGB and T organisations providing support to individuals. In some cases, these impacted on employers' actions through employees involvement in these groups. Some of these organisations do get involved with employers and provide valuable support (for example, providing advice through sitting on advisory groups). However, support from these organisations is *ad hoc.* Employers cannot rely on its availability. Moreover, these organisations' knowledge focuses on individuals and not on human resourcing and organisational change. Therefore, the study concentrated on specialist support, i.e. organisations which had a remit to provide human resource support to employers and which included support on LGB and T. However, where a case study employer had contact with such groups (e.g. Fire had a representative on one of its Groups), this is mentioned.

The websearch excluded consultancies. Few of the case study employers mentioned consultancies as a source of support (one for training and one, which mentioned Pearn Kandola, a consultancy with a long-standing reputation in the equalities field, more widely). None of the LGB and T and stakeholder organisations mentioned consultancies. This suggests that consultancies, generally, are not major players in this field.

Sixteen organisations were identified which provide employers support to make their workplace more LGB and T-friendly (including one which was closing). Four of these were organisations had wider remits than LGB and T,

four specialised in LGB and T issues, four specialised in trans issues and four in LGB, with one of the latter specialising in gay and bisexual men.

The type of support provided by these organisations included written guidance, assessment tools, training and consultancy. Some provided little or no assistance other than written guidance. Consultancy, together with publications and training, was more often provided by LGB and T specialist organisations.

The support provided is described below. Further details of the organisations is given in Appendix 3.

6.2.1 Organisations with a wider remit

Of the major organisations which had agendas wider than LGB and T, in respect of LGB and T support to employers:

- the Advisory, Conciliation and Arbitration Service (ACAS) provided a few publications (largely on legal aspects and some research reports), an assessment tool, training courses and an advisory service;

- the Chartered Institute of Personnel and Development (CIPD) provided a small amount of written material to non-members and training and publications to members; however, it appeared as though the support on LGB and T was limited;

- the Equality and Human Rights Commission (EHRC) rarely provided support other than publications and, for LGB, these were fairly limited, focussing on legal issues; a trans toolkit is provided on the website, but this is not very user-friendly, as it is composed of numerous separate web pages and is not downloadable as a single document; and

- the Federation of Small Businesses (FSB) provided legal advice, policy templates and telephone help.

6.2.2 Organisations specialising in LGB and T

The four organisations which covered LGB and T issues provided both human resource and service delivery support, with some focussed on the latter. None provided comprehensive cover across Britain, covering either a smaller location or a single industry. The organisation were:

- Stonewall Scotland[11]: this provides consultancy (via the Diversity Champions programme, see Stonewall England and Wales below), LGB benchmarking and free publications, including on LGB and trans;

- Intercom: training and consultancy in the South West of England;

- LGB and T Excellence Centre: training; accreditation scheme in Wales; and

- Schools Out: training, restricted to the education industry.

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[11] Stonewall Scotland is part of Stonewall. Stonewall is a devolved organisation, comprising Stonewall Cymru, Stonewall England and Stonewall Scotland. The first two cover LGB only, the last LGB and T.

6.2.3 Organisations covering LGB only

Support to employers by LGB specialist organisations was dominated by Stonewall[12]. The other three organisations were regional or industry focussed.

- Stonewall provide detailed information (freely available on its website) on policies and practices, including on implementation approaches and cases studies. It provides consultancy, advice and benchmarking through its Workplace Department. Owing to restricted resources, consultancy was mainly restricted to members of its Diversity Champion programme. It was only provided to others where Stonewall considered this met its wider objectives. In practice, this meant that consultancy was provided mainly to large employers (around 600 across Britain). However, Stonewall was developing a wider consultancy role.

- The Lesbian and Gay Foundation: training and consultancy, focussed on the Northwest.

- The Southwest LGB Network: facilitates interchange of information between employers in the South West of England.

- Gay Police Association, provides advice to the police services.

6.2.4 Organisations covering transgender and gender identity only

Six transgender specialist organisations which provided employer support were identified[13]. Two provided assistance to certain employers (the Police and the Civil Service) only. Of the others, three provided consultancy and training to employers and one published information. All were small. The organisations were:

- Gender Identity Research and Education Society (GIRES): consultancy, training and published information;

- the Gender Trust: publications and individual support; support for organisations;

- Press for Change: consultancy, training and published information;

- Scottish Transgender Alliance: published information;

- A:gender: advice and support to civil service departments; it runs a Trans Equality Index where departments can be assessed on their trans equality; and

- Trans Police Association: advice to the police services.

6.3 Case study employers' support experience: LGB

All the case studies employers which were developing LGB policies and practices had sought expertise outside their organisation.

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[12] See previous footnote.
[13] These also provided support to transgender people.

Information, advice and assistance was required for:

- development of policies and procedures, including first steps [Umbrella5]; and

- policy implementation [Umbrella5]

Whilst the above covered information, advice and assistance on specific policies and practices, participants in the study felt particular need for assistance for:

- monitoring: this was seen as a particularly tricky issue and even organisations which had highly well developed equal opportunities policies and practices reported needing expert assistance [LA3]; and

- establishing LGB networks [Umbrella5]; as well as information and advice on general issues around establishing a network, some employers sought assistance on the finer details, for example,

  'Well at this stage it's almost like the lessons learnt talking to individuals or other banks or Stonewall about guidance into what's the best way to start things. … how do we communicate? How do we have that launch event? … we want individuals who may attend to know there's support from senior management but we don't want them not to come because they're worried about senior management attending the event. So all those… quite detailed issues [which] are absolutely key to making sure that the launch event is a success. [Some] as simple as choosing the right place to have the launch. We don't want to go to, for example, a bar or anywhere too near the office where perhaps individuals may have normal departmental drinks. We want to go somewhere slightly different and we don't want to create an environment where people would be worried about walking in. So we want somewhere that's a little different, where they are not worried about being able to attend.' [Bank3]

Another area where support was important was outreach work [Police].

The organisations the case study employers used for assistance are listed in Table 6.1. Some used a single source [Umbrella1; Lawco1] (which was Stonewall), the rest ranged from using a small to a large number of sources.

Table 6.1 Support used: LGB

LGB organisations providing employer support	Stonewall	[Police; Lawco1; Prodco1; LA2; Prodco2; Bank2; Umbrella5; Bank1; Umbrella3; Retailco2; Umbrella1; Foodco1; Lawco2; Fire; LA3]
LGB organisations supporting individuals	Terence Higgins Trust	[Retailco2]
	Lesbian and Gay Foundation	[Fire]
	Others not specified	[Umbrella5]
LGB employee networks	Own networks	[Police]
	Other companies' networks	[Bank3; Bank2]
Other employers	Local Authorities	[LA3; LA2]
	Industry equality networks	[Prodco2; Umbrella5; Bank3]
	Employers' Human Resources networks	[Lawco2]
Professional bodies	CIPD	[Umbrella5]
	Law Society Equality and Diversity Forum	[Lawco2]
Unions		[LA2]
Consultants	Pearn Kandola	[Retailco2]
	unspecified	[LA3]
Statutory bodies	EHRC	[Prodco1; LA2]
	Government (unspecified)	[Police]
	Local Government Improvement and Development (formerly the IDeA)	[LA2]
Other	Other parts of the company internationally	[Bank2]
	Internet	[Umbrella5]

Stonewall was seen as the main source of information and advice on making workplaces more LGB-friendly[14]. It was used for a range of support: publications on actions and approaches (free on their website) and, by those

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[14] This was reported by stakeholder organisations as well as case study employers.

which were Stonewall Diversity Champions, for consultancy and benchmarking.

> *'Stonewall is really useful I mean the membership of the diversity champion programme isn't just £2,000 so that we can put a logo on our website or whatever it is, they actually do provide a lot of literature and we have a little library of brochures that Stonewall have produced which anyone in the firm is able to consult. They have a helpline as well which people here can use, …they also run conferences and stuff, one of which I have been to which help advise and how to improve best practice so that's the important one.'* [Lawco2]

> *'We have, we always make the best use of our annual feedback assessment feedback and really explore with our main contact what more we could be doing, how we could improve, what you know, what other good practices are going out then.'* [Umbrella5]

Even organisations which had highly developed equal opportunities policies and practices turned to Stonewall for advice [Lawco1; Prodco2; LA3].

Almost all case study employers which had used Stonewall found them extremely useful [Retailco2; Umbrella1; Lawco1; Umbrella3].

> *'They're very knowledgeable and they have access to a lot of information and they're able to provide guidance and support that was appropriate to our need in this company.'* [Umbrella3]

> *'We use them for consultancy so they've come in a couple of times. Sources of information, website, recruitment, materials that we can distribute throughout the building, intranet messages so just the full range.'* [Umbrella1]

The ability to copy and freely distribute information provided was seen as important by a number of case studies. It was also made about the Terrence Higgins Trust and may, as Retailco2 suggested, result from these organisations having a wider agenda, rather than to be focussed on profit.

However, not all case studies were uncritical of Stonewall. Membership of Stonewall's Diversity Champion programme costs £2,000 p.a.. Some found this difficult (and Stonewall acknowledged it could be a barrier for small organisations). However, others commented that it was good value for money *[Lawco1; Bank1]*

Prodco1 made an interesting comment about the role of Stonewall, that,

> '[becoming involved with experts] *You start to understand more about what the issues are and start to try at least to make some headway with the advice from these expert people. So it wasn't something we've consciously not done, put in a drawer marked "Too difficult", it's just a question of once we did get more into equal opportunities as a whole … we then, at a particular point in time, got more involved with Stonewall.'*

Stonewall was also mentioned as useful to the LGB networks, providing information and discussion [Prodco2].

However, Stonewall's approach did not suit all organisations and some felt it was too standardised and not flexible enough to suit some cultures. One preferred not to focus on individual equality strands, seeing this as contrary to their inclusive culture [Foodco1]. Another felt that Stonewall was too focussed on monitoring, an approach the company did not want to take [Retailco1]. They felt this meant they got little value from the Diversity Champions programme.

LGB organisations supporting individuals were used by some case study employers. The ways in which these were used were to provide experts on advisory groups [Fire] and to help the case study employer to ensure that the service they provided was appropriate to the LGB community [Umbrella5]. These too were seen as very helpful. As with Retailco2 felt that the Terrence Higgins Trust's willingness for them to share information they provided stemmed from the Trust's wider agenda and that it was not focussed on profit.

LGB employee networks Case study employers used their own employee networks to help the employer to identify problems, to feed into development of good practice (including monitoring) and to assist in gaining acceptance for policies (specifically, monitoring). Other companies' networks were also tapped into, which was useful where the organisation had a small or no network [Bank3]. Case study employers also reported their own LGB and T employee network getting support from other organisations' networks [Bank2].

Other employers were described as being highly co-operative about sharing information and providing advice. These included industry-based networks [Prodco2; Umbrella5; Bank3] and Human Resources networks [Lawco2]. Two Local Authorities said they had regular contact with other Local Authorities' equality specialists [LA3; LA2].

> *'the law firms are so keen to share best practice and we phone up our competitor law firm and say we're beginning to monitor do you mind if we have a meeting and chat to you about what your experience is and what your challenges were and they're more than keen to do that.' [Lawco2]*

One organisation (Bank2) was particularly impressed by a Conference they went to, organised by BT

> *'it was compered by somebody, by a transgender woman, a very confident speaker. The presentations I suppose just covered a whole range of issues and, that were very pertinent to the work place and so it did make me realise, you know, the gaps that we have got in policy of [and] our engagement with government, but as a group rather than in the UK. [Bank2]*

Issues raised meant that they realised that legislation affected their LGB and T workforce, for example, making it problematic for gay, partnered, members of staff to work in the US (as their civil partnerships would not be recognised for immigration purposes and so they should take these issues up).

Professional bodies were also mentioned as providing support. This included the CIPD [Umbrella5] and the Law Society, through its Equality and Diversity Forum, which provided a forum for law organisations to interact [Lawco2].

Unions with LGB specialists were a source of advice [LA2].

Consultants were used A Local Authority said they only used consultants '*for bits and bobs, specifically training'*, rather than for developing policies and practices [LA3]. Retailco2 mentioned using Pearn Kandola, a consultancy which has a long-standing reputation in the field of diversity and the company had found them '*excellent'* .

Statutory bodies. The EHRC was used by a case study employer which still had a long way to go to make its workplace LGB-friendly [Prodco1] and by a Local Authority [LA2]. The EHRC (Wales) had helped Prodco1 develop its with staff survey to cover equalities, providing extensive advice by phone. Prodco1 had found the EHRC '*good and professional*' and felt it covered most of the organisation's needs. However, others were more critical of the EHRC,

> *'I've tried to go on their website a couple of times. It's not particularly friendly.'* [Umbrella1]

One mentioned government more generally,

> *'I think the guidance and support from Government agencies is actually very good and I've used it quite a lot around transgender particularly so I think it's actually very good.'* [Police]

However, there may be a problem over knowledge as two organisations [Umbrella5; Lawco2] expressed the view,

> *'I don't think we would have ever thought to go to government departments for any advice or support.'* [Umbrella5]

Accessibility could also be a problem,

> *'[Government could be useful]…you've got Gov.net whatever it is the portal but its so huge and massive … you just don't know where to go and even if you go through the main portal it just gets so many results and searches for you know what those individual departments are doing around their own commitment to these agendas but it just feels that it hasn't got the same degree of profile or resources or support as perhaps other diversity issues have.'* [Umbrella5]

Other sources of support included other parts of the company internationally [Bank2] and the internet [Umbrella5].

A few other comments help illustrate the nature and quality of the assistance required. Retailco2 described an important aspect of the assistance they received from Stonewall, the Terrence Higgins Trust and Pearn Kandola,

> *'they don't push too much … because … this is only one particular issue on .. my agenda … so I've got lots of other people to worry*

about as well. So they are very good at giving you the information that you need.' [Retailco2]

Information overload was also a potential problem, where many organisations were involved in providing advice and, possibly, taking different approaches [Retailco2].

The case study employers which were not developing LGB and T policies and practices had not been in contact with any organisation about LGB and T issues [Designco; Foodco2]. One of these did not know where to look (although it did use government websites for other equality issues) [Foodco2]. Both said they would expect to find information through an online search.

6.4 Case study employers' support experience: Transgender

Few of the case study employers had taken action to make their workplaces more trans-friendly so it was not surprising that few had sought external support. The support sources used are listed in Table 6.2.

Table 6.2 Support used: transgender

Transgender organisations providing employer support	The Gender Trust	[Bank1]
	Press for Change	[Police]
	Gires (Gender Identity Research and Education Society)	[Police; Retailco1]
Transgender organisations supporting individuals	Inner Enigma	[Fire; Police]
	Trans London	
	Beaumont Society	
Employee networks	National Police Transgender Association	[Police]
	Own LGB and T networks	[Umbrella5]
	Other companies' LGB and T networks	[Umbrella5]
Other	Stonewall[15]	[Umbrella5]
	Internet	[Umbrella5]

Compared with LGB sources of support, information, advice and assistance on making the workplace more transgender-friendly was dominated by specialist transgender organisations, rather than a combination of specialist and organisations with a wider remit. Other than the internet, the non-trans specialist sources of support were LGB or LGB and T specialists (Stonewall and employee networks). This pattern suggests a greater need for specialist, rather than general, information in this area or, possibly, a lack of trans

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[15] Note that only Stonewall Scotland normally provides information and assistance on transgender issues.

assistance from the non-trans specialist organisations. Indeed, although Stonewall was referred to as proving trans support, this is not part of Stonewall (England and Wales) remit.

The type of support described by the case study employers included individual advice and having a representative from a trans organisation on the their diversity group. The organisation which mentioned Stonewall as providing assistance was tailoring Stonewall's LGB advice to transgender:

> *'the kind of literature they [Stonewall] produce the kind of guidance they give is as useful for transgender issues as it is for LGB.' [Lawco2]*

This may mean that the organisation was not, in fact, gaining specialist information relating to transgender, information which is likely to be necessary for making the workplace more transgender-friendly.

Prodco2 had found information, through its employer networks, on

> *'the whole process of gender reassignment, about getting you know, the whole you know, the different stages that people go through, some of the both specifically but also emotionally some of the challenges they face, some of the ways which employers can support them through the process. You know a lot of information which was very helpful.'*

Police described how they had used members of the Police's trans network (the Trans Police Association) to completely redo their trans policies and practices, resulting in a much more inclusive and comprehensive approach. The case study employers thought the quality of assistance was good, although one did comment that one of the organisations (Press for Change) were sometimes difficult to get hold of [Police], although acknowledging this was probably due to the demands put on them.

Some case study employers were unaware of the organisations which provided help on transgender. Some assumed there were some and that, if the need arose (i.e. they had a transgender employee) then they would be able to get find support [Lawco1]. Others seemed less aware that any existed [Prodco1].

6.5   Adequacy of support

6.5.1   LGB

As stated in Section 1.3.4, the identification of the adequacy of support was somewhat hampered by case study sampling approach, which was biased towards those receiving support from Stonewall, whilst most of the other case studies had little perceived support needs because they had little interest in taking LGB action. Nevertheless, the information provided by the case studies, together with the web search of support and interviews with stakeholders provided evidence on the adequacy of support.

Support structures

All the case study employers, including those which had never sought LGB support and those which had not taken LGB action believed that they would be able to identify support if they wished to.

For large employers, Stonewall seems likely to meet many needs, with inter-employer networks and, for those with them, own employee LGB networks providing further support. However, Stonewall's approach does not appear to suit all large employers, for example, those which do not wish to monitor and those that wished to take general diversity or equality approaches without LGB specific actions. There may be a gap in consultancy support for this group. However, whether it would be useful for there to be support to assist employers with these approaches is unclear, as this would depend on whether these approaches could be made more effective (i.e. whether or not monitoring and LGB specific actions are essential for progress).

The second gap in support was for smaller employers. Although smaller employers could join Stonewall's Diversity Champions programme and gain access to its consultancy, few do. The extent of other consultancy support is fairly limited, leaving smaller employers dependent on publications.

The charge for membership of the Diversity Champion programme, £2,000 per annum, may discourage membership and so reduce access to support. This is more likely the smaller the employer, although some of the larger employers raised this as an issue. Given the services provided to members and the business benefits described, we were surprised this level of fee might discourage large employers' membership (and thus their access to consultancy support). Obviously, lower costs or free consultancy and advice would avoid this problem. Alternatively, it may be that, the problem stems from payments being made out of equality budgets, but the benefits being realised under other budgets (and, in reality, being unmeasured). Greater recognition by senior staff outside the equality and diversity field of the business benefits of being LGB-friendly might reduce this problem. This might be assisted by the equality and diversity teams within each organisation, as well as by wider publicity on the business benefits. However, it also depends on the case for business benefits to be convincing to senior staff with less of an interest in equality and diversity and, as we have discussed, there is little robust evidence (see Chapter 5 and, particularly Sections 5.1and 5.6).

Employer networking was seen as useful, with employers very willing to share information. Some case study employers had access to good networks, largely on an industry basis. Others, outside these networks, suggested that a LGB-specific network (an Employers Forum on Sexual Orientation), similar to the Employers' Fora on Age or Disability would be useful. One of the advantages of these reported by case studies, was that, after an initial payment networking was free (rather than dependent on attendance at paying events). Their advice lines were also seen as good [Retailco1]. These comments suggest a lack of knowledge of the Stonewall Diversity Champion programme, as this provides networking of the sort described.

Nature of support provided

Our identification of the support available and case study employers suggestions suggest that the following would be useful:

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- provision of consultancy support for approaches which did not take LGB-specific actions and which did not include monitoring (as discussed above);

- more publications providing detailed information on practice and implementation, including case study examples; information required included setting up monitoring and employee LGB networks; employers were particularly keen on case study examples,

'The thing that brings it to life is always case studies. So you either look for organisations that are like you or a similar size or have similar characteristics and see what they're doing or you look to the big boys or big girls and see what they're doing and see what you might aspire to. So I think that case studies help to bring back to life because you can see real examples of how people have started, tackled, dealt with and then are able to demonstrate…. Case studies of like this person in this organisation and these were the issues that they faced and this is what was done to help them be comfortable in the work place.' [Umbrella5];

- benchmarking on an industry basis; for example, a Local Authority case study employer said

'something that we would benefit from is more benchmarking of the information perhaps, with some of those other organisations, best practice, I mean we've got the Stonewall index but I'm thinking more on the ground issues, maybe across local authorities, which we probably haven't got enough of at the moment.' [LA3]; and

- improved EHRC web design to make information more easily accessible.

The interest in detailed information and case studies might explain the popularity of Stonewall publications and the lower interest shown in EHRC and ACAS publications, which provide less of this type of detail. The latter publications (EHRC and ACAS) focus more on legal compliance and avoiding discrimination and less on developing LGB-friendly workplaces.

6.5.2 Trans

Case study employers which had used specialist trans organisations had found these very good. The main issues around trans support is that employers need information and assistance from a very basic level (understanding gender identity issues) to developing transgender policies to make their workplace more trans-friendly, as well as assisting an employee through transitioning. However, there is very little support available: organisations are small and there are few of them.

'Maybe there's a little bit on the information plan in terms of transgender. A little bit more of the information on …reasonable adjustments for transgender people, it's information on some of the treatment they might have, the effect that that might have, that could give … we could inform our occupational health we would understand, "Okay, this medication kicks in here …and this is the

process. This is the support that you could do in terms of running a lifting", if an employee's had an operation and they'd … what are the implications for that operation on a day to day job.' [Retailco1]

Employers are less aware of sources of support for making workplaces more transgender-friendly and cannot always identify support [Bank2; Umbrella5], even when spurred by an employee transitioning. This seems surprising as the specialist support organisations can be identified easily by an internet search[16].

Although there are few publications to assist employers make their workplace more trans-friendly, those that exist (by the specialist organisations) are relatively detailed. However, they are short on case study examples, an approach which the case study employers sought.

The extent of consultancy and training support is limited, with only a few, small organisations providing this. The study could not determine whether the extent of consultancy and training was adequate, but, certainly, some case study employers thought there was not enough assistance,

> *'[it's} a really complex area to work with and everybody remembers their first trans member of staff that they needed to integrate and you can make a real hash of it. So no, I don't think there is enough technical expertise to help with trans workplace issues.' [Bank1]*

Another mentioned how busy one of the specialist organisations was [Police].

At the same time, the small number of organisations involved in providing employer support was seen as making access to information easier [LA3; Retailco1].

It would seem useful to extend publications for employers to include case study examples of good practice. It may be useful to examine how well the current small number of publications meet employers needs in other respects. The EHRC might consider adding its toolkit as a single document. It would be useful to consider how support might be more easily identified. Perhaps, as a start, ACAS and the EHRC should include links to the main specialist support organisations identified in this study (including Stonewall Scotland). It may be useful to consider how consultancy and training could be increased.

To maintain ease of access, this might best be done through working through the current main organisations. Indeed, one case study employer suggested that having a single good provider of both LGB and trans support would be useful,

> *'It would be more effective for us to be able to go to a single organisation representing that agenda because that's one of the reasons why Stonewall [in respect of LGB] has been so successful in that, unlike some of the other diversity agendas, they have genuinely been a one-stop shop. Whether it be education, public*

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[16] The reasons for problems identifying support were not investigated. Possible problems could be lack of knowledge of the appropriate language or ability to judge the quality of the organisations found.

policy, business in the community or asylum seeking or whatever, they've covered the whole breadth.' [Bank1].

This respondent could not understand why Stonewall (in England) did not also cover trans, especially as Stonewall Scotland did.

6.5.3 Who should make provision

There seemed to be some preference amongst case study employers for third sector organisations or the public sector to provide support. To some degree this appeared to be driven by cost: with the expectation that the public sector could make free provision and the third sector would, in pursuit of their wider aims, keep costs low. Examples of this had been provided by the a case study saying how it helped them that material provided by Stonewall was freely copiable for use in their organisation. Low cost may be particularly important for e'mployers which are doing very little

EHRC ought to provide more so that we do not have to go to other organisations and pay.' [Umbrella1]

However, for the public sector to meet employers' needs, there may be need for some changes in approach and emphasis. Improved accessibility to information (including user-friendliness of websites) and increased, detailed information on Human Resources policies and practices and case studies might be useful.

6.6   Key points

The picture of support for employers wishing to make their workplaces more LGB and T-friendly is mixed:

- publications: those which seem to best meet employers' needs on human resource policies and practices are from LGB and T organisations; government bodies (ACAS and the EHRC) seem to focus more on the legal side;

- non-commercial consultancy is available: for LGB for employers which are members of Stonewall's Diversity Champions and for trans from a small number of trans organisations;

- employer networks provide fora for exchange of information; and

- larger employers appear to be better served.

Support seems to be mainly provided by non-commercial organisations, although this impression might have been due to the study method.

Non-commercial provision is fairly limited, dominated by Stonewall for LGB and a small number of small organisations for trans. Government organisations seem to provide little of the detailed human resource information or consultancy support. This pattern may lead to difficulties accessing consultancy support for some employers, particularly, for LGB, for those who prefer a different approach to Stonewall's and for smaller employers. Expanding the number of providers in respect of LGB might be useful. For trans consultancy, expanding provision (whether through the

number of organisations or their capacity) might be useful, although the study could not assess whether there was unsatisfied demand in respect of trans.

As well as advice and consultancy, the following might be useful

- the provision of more information on good practice case studies: these seem to be particularly welcomed by employers;
- the establishment of more employers' networks;
- assistance with monitoring;
- benchmarking on an industry basis; and
- improved EHRC website accessibility.

Improving accessibility and relevance for smaller employers is particularly important.

Minimising the cost of support is important and provision through the public and third sector seems attractive to employers.

7 Government action: employers' and stakeholders' views

7.1 Introduction

Employers and stakeholders were asked about the actions that the government and its agencies might take to help make workplaces more LGB and T-friendly. The responses ranged widely, from employment specific to wider approaches and tackling attitudes at large.

Many of the case study employers felt that the government had been quite good already in making work and society generally more LGB and T-friendly. Many were unable to suggest further action or appeared to have no strong views on more action.

On being asked about government action, most case study employers' solely considered legislation and only raised other types of action when prompted.

7.2 Employment-specific

Some case study employers, felt there was no need for further action from the government to make the workplace more LGB-friendly, feeling the government had already taken effective actions. Some were ambivalent about the need for more government action for LGB,

> *'Well, interestingly, the LGB and T agenda I feel is left to … I do wonder sometimes whether there should be more of a leadership role from government in LGB and T workplace. I'm sure there's a stand back deliberately because Stonewall is so effective, but if you look at the other strands of activity, it's a government-related body that leads that. … But then again, I'm thinking why meddle? It seems to work.' [Bank1]*

Others felt that the government could take a greater leadership role and ensure effective take up of legislation,

> *'Government is there to legislate but it sometimes feels that once a legislation bit has been done there's not always such a commitment to follow through and ensuring there is a degree, I hesitate to use the word compliance but I guess it is compliance but within a supportive context where its not… just stick but I think Government could do a lot more to celebrate and recognise the benefit of the work and also then to showcase it and to show good practice.' [Umbrella5]*

Another case study employer compared government action on LGB and T unfavourably with that on gender,

> *'There's so much stuff in the gender space. It's just everywhere. It would be difficult for an organisation I think not to do any work on gender at the moment because it's everywhere you go…There doesn't seem to be as much around LGB and T. I don't understand why that is. And also the statistics, I don't know if they're absolutely right as well. I hear it's been 5% and 7% of the population. It would be great if they could help lead the way, I think.' [Foodco1]*

The types of action which were employment-specific suggested included,

- increase publicity about rights, legislation and good practice, in order to encourage employers to do more [Bank2; Bank1; LA2];

- having someone high profile coming out as trans [LA2];

- improve access to information [Prodco2], including providing a single point of contact and repository for information, so that employers did not need to contact lots of organisation to get information [Retailco2];

- promote best practice [LA3];

- create a kite mark for LGB and T-friendly workplaces; one suggested this could be part of *Investors in People*,

> *'If for Investors in People to really live what it says it is then you'd expect there to need to be a commitment as part of the standard to supporting diversity in its wider sense but then particularly perhaps you know what specifically are you as a good employer doing to support these issues within your organisation and, therefore, the kite mark becomes more about what it is to be a good employer.' [Umbrella5];*

- help establish networks [Foodco1];

- strengthen enforcement [Prodco2 network respondent]; and

- improve the reputation and management style of the EHRC (the latter was seen as bullying, which was seen as contrary to its aims) [Umbrella1].

The need for support for small employers specifically was raised [Prodco2], some feeling that smaller neither had the resources nor knew what to do [LA2].

> *'I think where might be helpful for government to provide resources, make resources available would be in a very small business area where a 10 person employer doesn't have the resources to become a member of Stonewall or diversity champions or to kind of pay for external consultants to come in and give training. There the government might have a role to play.' [Lawco2]*

The private sector was seen as needing more support (lagging behind the public sector) [Foodco1]. This meant tailoring government action towards the private sector, which required a better understanding of the sector [Lawco2] and focussing on the business effects and benefits.

7.3   Wider actions

The problems encountered in the workplace stem from wider attitudes towards LGB and T and action on a wider-front to tackle prejudice (LGB and T [Bank2]) and improve understanding (transgender) was seen as important if workplaces were to be made more LGB and T-friendly. The need to promote understanding was seen as particularly important for transgender, due to lack of understanding of gender identity issues and the hostile publicity received.

Other actions included,

- including sexual orientation and trans in the Census [Police]

'from the census will come first of all some information, I do appreciate it wont be accurate because it never is, is it? But at least we'll have some figures. You see part of the problem for our work in our and I'm sure it's the same for everybody is we work in the dark on what the need is. We assume the need, we know the need anecdotally... We know the need is there, we know roughly we have an idea of how many people could proportionally be in our organisation but we can never prove anything, we've got nothing. The only legislation or our only data that is absolutely bog standard correct, that's not the right word bog standard, correct is in partnerships.' [Police];

- creating parity across equality strands [Police], including creating a public duty for all equality strands[17] [Umbrella3]

'need parity across the legislation and I know that will come in time I hope but we have issues around faith in LGB and T. Where freedom of speech gets to be a problem, who you can offend and who you can't. It's a little bit messy and we just need that, we need that more clear really from our perspective and it will be easy. Again parity with race and gender basically.' [Police] ; and

- with a public duty extended to LGB and T, create a stronger focus on procurement [Umbrella3]

7.4   Key points

Government was seen to have taken beneficial actions in respect of LGB.

The problems encountered in the workplace were seen to stem from wider attitudes towards LGB and T. Government action to tackle prejudice and to improve understanding, especially for trans, was seen as important. Tackling trans hostility in the media was seen as very useful.

Other suggestions from the case study employers and the stakeholders for taking the agenda further included,

- better follow through of legislation, including enforcement, with government providing leadership;

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[17] Since the fieldwork was conducted, the Equality Act 2010 has created parity in respect of the public duty.

- increased publicity about rights, legislation and good practice, in order to encourage employers to do more;

- improved access to information including providing a single point of contact and repository for information;

- create a kite mark for LGB and T-friendly workplaces;

- help establish networks;

- improve the reputation and management style of the EHRC;

- create parity across the equality strands, including ensuring equal implementation of the public duty in the public sector; and

- include sexual orientation and trans in the Census, to provide data useful for monitoring.

Support appeared to be most needed by small employers and the private sector.

It was also mentioned that having someone high profile coming out as trans would be useful.

8 Conclusions

8.1 Introduction

The study has examined motivators to, barriers to and business benefits of making the workplace more LGB and T-friendly and the support available to employers. This chapter presents are conclusions based on the evidence gathered form the employer case studies, the discussions with stakeholders, the literature review of business benefits and the review of support.

8.2 LGB and T differ

Whilst those familiar with the issues recognise that sexual orientation and gender identity are two separate issues, employers' policies and practices often treat them as a single issue. This study has identified differences between LGB actions and transgender actions in respect of motivators, barriers and business benefits. The legal issues also differ. At the same time, whilst some organisations provide support to employers for both sexual orientation and gender identity, some of the main organisations specialise in one only.

For these reasons alone, it would be better if sexual orientation and gender identity were not treated as a single issue in respect of employment policies and practices. This is all the more important because combining the two issues seems to result in gender identity often being overlooked: it is easy for 'LGBT' to trip off the tongue and for employers then to take LGB-specific actions. The same issue, although less explored was raised by a stakeholder organisation in respect of bisexuals.

This does not mean that LGB and T networks should be discouraged: trans members will not forget they are trans. However, greater consideration might also be given to cross-employer trans networks. Nor is there a problem with organisations providing support to employers on both LGB and transgender (as for example, does Stonewall Scotland), as it is unlikely that transgender will be overlooked because a support service provides advice on both. (The problem of overlooking transgender is internal to the employing organisation.) However, to maintain the public profile of transgender, it may be important that some transgender-specific support organisations exist.

8.3 Transgender

The size of the trans population combined with the extent to which transgender is hidden combine to make transgender an issue which is not seen as relevant by many employers. Need for action is not considered (or if

considered, it is likely to be dismissed) except where employers are very highly committed to equality and diversity. Business benefits as a motivator are slight owing to the small and invisible population. These will normally be confined to the morale, performance and retention of transgender employees and, those working with them. Exceptionally, business benefits will occur where serving (or needing assistance from) the trans community is important. They may also be realisable by large employers with extensive skill (or talent) shortages, where the costs of a small improvement in recruitment are low, due to economies of scale.

In general, there is substantial ignorance about transgender and hostility towards transgender people. When employers do feel the need to take action (which, apart from employers with a strong commitment to equality generally, seems to be prompted by having an employee transitioning and by legislation raising the issue) they need both legal information and advice and assistance in how to handle the situation. This can be difficult for them to find.

There are a small number of good publications available on the internet and consultancy is provided by a small number of non-commercial organisations, which case study users reported to be good.

Much needs to be improved if workplaces are to become trans-friendly and much needs to change outside the workplace. This includes greater education and information of society as a whole to reduce ignorance and to reduce hostility. The employer research suggested that increasing recognition of transgender as a medical condition might assist understanding and acceptance. However, this may not be seen as desirable by transgender organisations. The pros and cons of this approach need further investigation. Greater understanding would not only make it easier for employers to take action, but would place it on more employers' agenda. Increased publicity about rights, legislation and good practice would also help. In the workplace itself, the aim should be to develop proactive policies and practices, so that those with gender identity issues feel more confident about raising the issue: only taking action when prompted tends to encourage the issue to remain hidden.

An expansion in employer specific support may be useful. Certainly, increased good practice guidance, illustrated with case studies, would be useful. It may be useful to examine how well the current small number of publications meet employers needs in other respects. It was not clear if there were unsatisfied demand for consultancy. However, this may need to be expanded if demand is stimulated and so it may be useful to consider how consultancy and training could be increased. It would be useful to consider how support might be more easily identified. Better signposting from government organisations (e.g. links to the main specialist support organisations on ACAS and EHRC websites) to support and information may be helpful.

The study did not look in detail at transgender networks and it was not clear how well LGB and T networks served the transgender population, nor worked to make workplaces more trans-friendly. As raised in Section 8.2, consideration should be given to developing trans networks, as well as LGB and T networks.

8.4 LGB

8.4.1 Barriers

Inertia, lack of understanding that it was a workplace issue and nervousness about the area were key barriers to employers taking action to make their workplace more LGB-friendly. Uncertainty about how to address LGB issues were also a barrier and employers could be worried about resistance from employees, with straight employees being hostile and LGB employees feeling exposed.

Objections from straight staff can increase as LGB action progresses, particularly where this raises the employer's public profile on sexual orientation. Staff objections can also change over time, for example taking a religious aspect.

Barriers can be harder to overcome in peripheral sites and offices, and in relation to monitoring of sexual orientation. Male dominated environments can be particularly difficult.

Costs were not seen by human resource and equality specialists as a constraint, but, in reality, they may be as resource limitations can result in inaction pending work on other equality strands. The study did not fully tease out the reasons for LGB action being placed second (or lower) after other equality strands. It may be due to other strands being more familiar and better accepted or it may be due to lesser pressure or expectations of fewer business benefits. External payments (for example, for training, membership of LGB organisations and for LGB activities, sponsorship and donations could also be constrained.

A preference to address LGB within equality and diversity as a whole, without LGB-specific approaches could also prevent development of a LGB-friendly workplace. This may be due to a general philosophy of how to address equality and diversity or may be due to feeling the issue is too sensitive.

Some employers did not recognise there was any problem, believing their workplace to be fully LGB-friendly. This requires regular validation. Otherwise, a vicious circle of lack the workplace being LGB-friendly leading to LGB employees unwilling to raise issues leading to the perception that all is fine can be sustained.

8.4.2 Motivators and overcoming barriers

Four main factors seemed to lead to LGB action:

- a general commitment to equality and diversity, sometimes honed by a competitive spirit to be better than others;

- expectation of business benefits, including, in the public sector, better serving the LGB community;

- LGB employees or a senior manager (whether LGB or straight) prompting action; and

- legal and statutory requirements.

It is important to develop organisational commitment at a senior level to progress and to make a clear case to employees for action on sexual orientation. LGB networks can also be important in driving action. It is important to view action as a continuous exercise, otherwise workplaces will regress.

Government might reinforce motivators through promoting enforcement of legislation, helping employers to recognise the business benefits of action and assisting the establishment of networks. Creating parity across the equality strands, including through ensuring the public sector implements the public duty equally across the equality strands, would further encourage employers to ensure their workplace is LGB-friendly.

8.4.3 Business benefits

Business benefits are motivators to making workplaces more LGB-friendly. These hinged around: attracting, retaining and getting the best out of employees (and hence raising productivity and customer service); attracting custom; improving service to the LGB community; improved image; and avoidance of tribunal costs and damage to reputation.

For employers seeking to become more LGB-friendly, equality and diversity specialists recognise these benefits, which they believe to outweigh the costs of implementing policies.

However, there is very little robust evidence of the business benefits. This demonstrates a dearth of research into the issue, as well as the difficulties of providing evidence. Whilst the benefits described by employers and LGB and stakeholder organisations are plausible, it is not clear how large these are or whether they outweigh the costs of action. To encourage employers to place a higher priority on making their workplace more LGB-friendly and to increase resources for action may need senior non-equality and diversity specialists to be convinced of the business case and these may need more robust evidence.

However, the difficulties of providing robust evidence should not be overlooked. Whilst there has been much more research into the business benefits of gender equality, most evidence is of the narrative or descriptive quantitative kind and, because of the size of the LGB population robust evidence would be more difficult to provide.

Employee-related business benefits largely hinge on the belief that treating employees well and fairly results in better performance. This is a widely held view: those that hold it are unlikely to need proof in relation to LGB and those that do not are unlikely to be convinced by (or read) evidence related to the benefits of making workplaces more LGB-friendly. Therefore, trying to provide more robust evidence may not be an effective policy approach. However, not all employers which subscribe to the 'treat people well' human resource approach recognise the link between sexual orientation and employee morale. Making sure employers are aware how a workplace being LGB-unfriendly (e.g. having to conceal ones sexual orientation; anticipating and putting up with harassment) can affect an employee's ability to do the job and their commitment to the job would be useful. LGB specialist organisations may be

particularly able to explain the links between a LGB-friendly workplace and business benefits.

Proving business benefits in relation to *sales, services* and *wider considerations* is equally problematic. Other than general sales reaching the pink pound, these types of business benefits vary with the business. Raising awareness of potential benefits, so that employers can consider what is relevant for their own business, may be all that is necessary. Case study examples might be helpful.

8.5   Support

Employers, including those with relatively large equality and diversity staffing feel the need for external support in making their workplace more LGB and T-friendly.

Information, advice and consultancy are needed for all aspects of developing and implementing a LGB and T-friendly workplace. Monitoring and establishing LGB and T networks were areas highlighted where greater support was sought. Assistance needs to be highly detailed. Employers seem to appreciate case studies illustrating policies and practices.

Current, non-commercial, provision is fairly limited[18] and dominated by a small number of organisations: by a single large organisation (Stonewall) for LGB and a small number of small organisations for transgender. ACAS and the EHRC also play a role, although these seem to focus on legal information rather than human resource aspects. Together, these organisations meet some employers' needs fully. However, the extent of support is limited by these organisations' size and some expansion might be helpful. Employers seemed to focus on costs and, for this reason, provision by the state and the third sector may be preferable. Whether expansion would best be through the development of more providers or expansion of existing providers is unclear. Certainly, Stonewall's approach (with an emphasis on monitoring and LGB-specific action) does not suit all employers. However, whether a different approach would lead to such employers becoming more LGB-friendly is unclear and it would be useful to examine how effective other policies and practices would be.

The other way that employers received support was through employer networks. Employers appeared very willing to share information and this was seen as valuable. However, not all employers can tap into existing networks and it would be very useful for networks to be expanded to reach more employers.

Smaller employers may be less well served, in their access to support and to networks. Consideration of how to stimulate support for smaller employers would be useful.

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[18] The study did not examine commercial provision.

8.6 Variations with organisation characteristics

Employer size, sector and employment composition seem to affect the development of LGB and T-friendly workplaces and employers' support needs. Policy needs to take note of this.

Public sector and large employers seem to have a greater awareness of the need (whether for legal, ethical or business reasons) for action.

Whilst employers of all types might recognise employee-related business benefits, recognition of their obligation to serve the whole of their relevant population seems to be an important driver for action in the public sector in particular and, for some public sector organisations, recognition of the need to gain the confidence of the LGB and T population to perform their services better.

However, this does not mean that all public sector employers have developed good policies and practices leading to being LGB and T-friendly. Small public sector organisations seemed to suffer as much as other small employers from lack of expertise and resources and seemed as much in need of support.

The problems small employers have in making their workplace more LGB and T-friendly seem related to resource constraints. Small employers cannot have the same degree of expertise in-house as large employers. Lack of economies of scale mean that developing policies and practices is relatively more expensive, reducing the likelihood of net business benefits. Easy access to succinct information and advice is particularly important for this group, as is low cost consultancy. Smaller employers tend to be less-well networked in respect of human resource issues generally and equality and diversity issues in particular. They are therefore less able to learn from each other. Developing networks for smaller employers and, perhaps, networks encompassing different sized employers would be useful. The smallest employers, without human resource or equality and diversity specialists, seem least likely to recognise that LGB and T is a workplace issue and this needs to promoted. However, it is difficult to see how this would be effective, given that business benefits are likely to be small and not recognised.

Whilst part of the difference between large and small employers may be in their human resource sophistication and hence recognition of business benefits, the net business benefits will vary with employer size (as well as other characteristics). For small employers costs (whether these be in staff time in developing policy, membership of LGB and T organisations, training or recruitment advertising) are likely to be disproportionate to the benefits across a small workforce. At the same time, multi-site organisations seem to face greater difficulties in implementation and hence greater costs.

Other employer characteristics can also be important in affecting whether an employer develops LGB-friendly actions. Higher skill requirements should raise the benefits of action. Male-dominated, or perhaps, male blue-collar dominated workplaces seem to be more resistant to effective LGB and T action. The external environment can also be important: the economy will affect skill shortages (and therefore the net return from increasing the recruitment pool) and benefits will vary with location. In particular, employers may see it as more important to be LGB-friendly in 'gay-friendly' locations.

The difference in the propensity of employers to take action, needs to be considered in the development of government policy. Basing policy on needs requirements suggests that actions should be targeted at the types of employers which are less likely to take action. However, greater progress might be achieved amongst the type of employers which are more likely to take action.

8.7 Wider action

Obviously, the reason that action needs to be taken to make workplaces more LGB and T-friendly is that there is homophobia and hostility towards trans people in society at large. Government action to tackle prejudice more widely and to improve understanding, especially for trans, is important. Tackling trans hostility in the media would be very useful.

9 Recommendations

Sexual orientation and gender identity should be treated separately in all areas of equality policy and employers should be encouraged to treat the two separately. This would apply for example, to all government actions, inlcuding publicity and information, good practice guidance and support.

There may be scope for **encouraging employer organisations and professional bodies to provide more support and to raise awareness of the need for wiorkplaces to be LGB and T-friendly**.

9.1 LGB

The following would be useful:

- **a campaign to promote action**, presenting business arguments and sources of information and assistance; consideration should be given to the variety of business benefits for different types of employers (by size, by sector and by industry);

- **promotion of employer LGB networks**, (similar to the employer for a on age and on disability), including for smaller employers; industry-based networks might be particularly useful; this might be achieved through an expansion of the Stonewall employers network for its Diversity Champions;

- **increased provision of good practice guidance**; this needs to

  o provide information about the reasons for action (largely, the potential business benefits and costs of inaction)

  o provide detailed guidance on actions, including, in particular, monitoring and the establishment of employee networks, including for small employers;

  o to emphasise the importance of leadership and how to develop leadership; and

  o to emphasise the need for and purpose of monitoring (to identify whether and how LGB employees are disadvantaged);

  Guidance should take into account needs of different types of employers (by size, by sector and by industry) and be illustrated with case studies drawn across the range of types of employers. Stonewall provides good examples of good practice guidance;

- **improved access to information** including

  o **better signposting** of available information and assistance on government websites and amongst stakeholder organisations; and

- o provision of **a single point of contact** and repository for information;

- **creating parity across the equality strands**, including ensuring the public sector implements the public duty equally across the equality strands;

- **the provision of low cost advice and consultancy for smaller employers;**

- **create a kite mark for LGB-friendly workplaces; and**

- **benchmarking on an industry basis.**

In relation to business benefits, we are sceptical of the search for evidence to convince employers of the business benefits: the evidence will be poor and likely to be unconvincing to those who are not already committed to making the workplace LGB-friendly. Instead, we would suggest that there are two approaches. The first is for employers which recognise a link between employee morale and productivity, but have not understood the link between LGB employee morale and an LGB-friendly workplace. For these**, publicity about the effect on morale, commitment and related areas such as teamworking of LGB employees not being able to be themselves at work would be useful. This should provide the necessary information for such employers to make the link between a workplace being LGB-friendly and business benefits.**

The second business benefits approach is **to present to employers possible benefits through increased demand from the LGB community, including better service and potential tailoring to LGB customers.** For the public sector, the importance of service to all their community, should also be raised. Case studies of how this may occur would be useful. However, these should not be presented as though these are universally available business benefits.

The issue of **Stonewall dominance** was raised in the study and whether it would be useful to have more organisations providing support. (See Sections 6.5, 6.6 and 8.5.) The first argument was that Stonewall cannot provide support to all those which would benefit and that smaller employers, in particular, miss out. This is an issue of how to expand support, rather than the dominance of a single organisation. Employers seek low cost support (particularly small employers) and there is no reason to suppose that this could be provided by other organisations and not by Stonewall. The issue is resources. Moreover, the quality of Stonewall's consultancy (and publications) and of the advantage of having a single main organisational contact were recognised. The latter would be lost with an expansion of organisations and the quality of new organisations is uncertain. The second issue is that Stonewall does not fully cater for employers which wish to take non-LGB specific and non-monitoring approaches. The effectiveness of such approaches needs to be examined. If these prove to be effective and if Stonewall cannot provide effective support for alternative approach, then this might be a reason to encourage other organisations to provide support.

9.2 Gender identity

Hostility towards trans people is strong and needs to be addressed to make workplaces more trans-friendly (see Section 4.3.5). **Action to reduce hostile publicity is required as is publicity to reduce ignorance and create greater acceptance.**

For employers specifically, the following would be useful:

- **promotion of employer networks on transgender**, including for smaller employers;

- **increased good practice guidance** (on how to make workplaces more trans-friendly and the importance of proactive policies); in particular, case study examples would be useful;

- **an emphasis on the need to develop policies around transgender generally and not transitioning alone,** i.e. policies and practices need to address pre- and post-transition needs as well; and

- **better signposting** of available information and assistance on government websites and amongst stakeholder organisations.

Further consideration might be given to whether the following would also be useful:

- **support to assist in the establishment of trans employee networks**, including for employees in small organisations; and

- **whether there is need for more consultancy support** and, if so, how to encourage this, particularly given the reluctance of employers to incur external costs.

Throughout, whilst transitioning should be addressed, a narrow focus on this should be avoided, with approaches encompassing gender identity issues more widely.

Appendix 1: Stakeholder discussion guide

1   Barriers

1.1   What do you see as the barriers to employers making their workplace more LGB and T-friendly?

If not raised, prompt for:

  a) ***Attitudinal barriers*** *– resistance from employees and senior management, resistance from LGB and T staff*

  b) ***Resource barriers*** *– low prioritisation of LGB and T work compared to other equality work, the impact of the current economic climate, inadequate staffing*

  c) ***Knowledge barriers*** *– lack of understanding of the issues and of their relevance to the workplace*

  d) ***Evidential barriers*** *– a lack of evidence to support the need and the benefits of undertaking the work, a lack of reliable organisational monitoring data*

  e) ***Legal barriers*** *– a lack of a legal duty on employers, a lack of understanding about employers legal responsibilities, confusion caused by employment tribunal rulings*

  f) ***Structural barriers*** *– small workforces, dispersed workforces, sub-contracting*

  g) ***Institutional barriers*** *– occupational segregation, lack of LGB and T employees, perception of organisations/industries as homophobic*

1.2   Do the barriers differ

  a) **for those just starting out and for those which have already taken some actions?**

  b) **for LGB and T?**

  c) **by industry, sector, main occupations, size, location etc?**

1.3 **Why have some employers taken action and others have not?** *- i.e. prompts to action*

1.4 Evidence for their beliefs?

2 Employer benefits

2.1 What benefits are there to employers in developing a LGB and T-friendly workplace?

If not raised, prompt for:

a) ***Staffing*** *–*

- *recruitment*
- *retention*
- *morale*
- *IR*
- *productivity*
- *skill development*

b) ***Customers/products*** *–*

- *understanding of customers*
- *product development*
- *customer response*
- *public sector (or other) procurement demands (including Equality Bill)*

Differences by LGB and T?

Differences by industry, sector, main occupations, size, location etc?

2.2 **What about any costs** *– distinguish between transitional and permanent*

- *costs of developing policies and practices*
- *costs of implementing policies (training etc.)*
- *getting information*
- *customer response*
- *workforce resistance/poor IR*

Differences by LGB and T?

Differences by industry, sector, main occupations, size, location etc?

2.3   Evidence for their beliefs?

3   Action and assistance

3.1   What would help – or make sure – employers took action to become more LGB and T-friendly?

Prompt for the barriers identified

3.2   What do you see as the respective roles for
   a) *government departments and agencies*
   b) *other public sector (e.g. Local Authorities)*
   c) *LGB&T organisations*
   d) *other voluntary sector*
   e) *trade unions*
   f) *employer organisations*
   g) *others*

Prompts

- *information, advice, consultancy*
- *legislation*
- *funding (to the employer)*
- *funding to other agencies*
- *publicity*

For each: why a role for this body and not another body?

4 Assistance provided by the organisation

4.1 What support/services does the organisation provide to employers?

- *information/advice/consultancy*
- *policies and practices/managing change/on legal responsibilities/on benefits*
- *publicity*

4.2 How is this funded?

4.3 Extent of activity in this area

- size
- limitations on coverage

4.4 What other organisations provide support to employers?

get details, as above and contacts

4.5 Are there other organisations which could be useful to tals to as part of this study?

5 LGB and T-friendly employers

5.1 We need to talk to employers who are at different stages of developing a LGB and T-friendly workplace. We are aware of the Stonewall information on this. Do you know of any employers?

- what doing/done
- organisation details: size, sector, industry
- contact details

Appendix 2: Employer discussion guide

1   General background (where not already known)

Organisation
Address
Interviewee name
date
interviewer
Industry/main products/services
Sector
Organisation size (UK)

Is the organisation foreign owned?

- country of ownership

- does the parent company/head office influence human resource policies, especially Equal Opportunities, or is the UK organisation completely independent?

2   Overview of Equal Opportunities policy and practice

Do you have an Equal Opportunities policy or statement? *Get copy*

Does it explicitly cover LGB or sexual orientation?

If not, why not?

if yes does it explicitly mention:

lesbians
gay men
bisexuals
sexual orientation

Does it explicitly cover transgender, transsexuals or gender reassignment? which?

If none, why not?

If transsexual (and not transgender nor gender reassignment)

Do you know why it mentions transsexual and not transgender?

Throughout the interview use whichever term they use.

ASK ALL

(Other than the LGB policy/statement), have you taken any actions to improve Equal Opportunities for LGB or make the workplace more LGB-friendly?

IF NO LGB ACTION,

Have you thought about this issue or about doing anything?

Why haven't you taken any action?

- didn't think about *try to get to explain*
- no reason to *why not? (no LGB employees? – what about potential recruits?)*
- no LGB and T employees (*how do you know this?)*
- expected/actual resistance from employees, line managers, senior management, LGB staff;
- assumptions that others would not like it (customers, clients, locality, general industry, potential recruits)
- costs (*what*? developing policy, specialist staff, practices, training….);
- lack of knowledge (*what*? of the issues, relevance to the workplace, what to do, how to do it…..)
- difficulties of doing it, *explain*
- lack of evidence of needs (*what*) or benefits
- Legal knowledge/constraints: lack of understanding of legal responsibilities; fear of doing the wrong thing. *is this worse than for other strands? Why? What's the problem?*

Do you think there is any reason to do anything in your organisation? What reason?

What do you think would prompt your organisation do take action?

Do you think that not taking action on this affects employee commitment? (*of LGB, of non-LGB*)

How important is developing employee commitment to the organisation?

ASK ALL

(Other than the trans policy/statement) have you take any actions to improve Equal Opportunities for transgender/transsexuals or make the workplace more trans-friendly?

IF NO TRANS ACTION,

Have you thought about this issue or about doing anything?

Why haven't you taken any action?

- didn't think about *try to get to explain*

- no reason to *why not? (no trans employees?)*

- no trans employees (*how do you know this?*)

- expected/actual resistance from employees, line managers, senior management, trans staff;

- assumptions that others would not like it (customers, clients, locality, general industry, potential recruits)

- costs (*what*? developing policy, specialist staff, practices, training….);

- lack of knowledge (*what?* of the issues, relevance to the workplace, what to do, how to do it….)

- difficulties of doing it, *explain*

- lack of evidence of needs (*what*) or benefits

- Legal knowledge/constraints: lack of understanding of legal responsibilities; fear of doing the wrong thing. *is this worse than for other strands? Why? What's the problem?*

Do you think there is any reason to do anything in your organisation? What reason?

What do you think would prompt your organisation do take action?

Do you feel that transgender is covered by your LGB policies and practices? In what way are they covered?

Do you think that not taking action on this affects employee commitment? (*of trans, of non-trans*)

How important is developing employee commitment to the organisation?

3 Development of policies and practices: LGB

ASK ALL WITH LGB POLICY/TAKING ACTION

When did you first start developing a policy (or action) explicitly in respect of LGB/sexual orientation? *very approximate is fine*

Why did you start developing policy (or action) on LGB/sexual orientation?

What prompted this? *get full details*

- LGB staff demands *what, how expressed and response*

- other individual *who, why*

- specific incident(s)/case(s) *what*

- inclusion of LGB in equality law

- legal duty on public sector employers in new equality law

- requirements of customers/in contract *explain*

- professional body (e.g. CIPD) *how picked up*

- media *what*

- risk aversion/trying to avoid employment tribunal – awareness of vicarious responsibility

Why didn't you do so previously? *get full details*

- no reason to *why not? (no LGB employees? – what about potential recruits?)*

- no LGB and T employees (*how do you know this?)*

- expected/actual resistance from employees, line managers, senior management, LGB staff;

- assumptions that others would not like it (customers, clients, locality, general industry, potential recruits)

- costs (*what*? developing policy, specialist staff, practices, training….);

- lack of knowledge (*what*? of the issues, relevance to the workplace, what to do, how to do it…..)

- difficulties of doing it, *explain*

- lack of evidence of needs (*what*) or benefits

- Legal knowledge/constraints: lack of understanding of legal responsibilities; fear of doing the wrong thing. *is this worse than for other strands? Why? What's the problem?*

ASK ALL WITH LGB POLICY/TAKING ACTION OR HAD THOUGHT ABOUT DOING SOMETHING

Did you expect any problems?

prompt for differences across the organisation (by location, type of business, size, e.g. HO and branches) and in follow ups. Why differences?

What?

Did this influence taking action (when, the approach taken…..)

Did the problems materialise?

How avoided/overcome (or not)

Did you expect any cost?

What? – *distinguish between transitional and permanent*

- *costs of developing policies and practices*
- *costs of implementing policies (training etc.)*
- *getting information*
- *customer response*
- *workforce resistance/poor IR*

Did this influence taking action (when, the approach taken…..)**)**

Did the costs materialise? *why not?*

Did you expect any benefits from addressing LGB issues?

What?

Did this influence taking action (in what way? when, the approach taken….)

Did they materialise?

Have there been any other benefits?

Staffing: *recruitment, retention, morale, IR, productivity, skill development, promotion, absence/sickness*

Customers/products: *understanding of customers, product development, customer response, public sector (or other) procurement demands (including Equality Bill)*

Do you think that your LGB/T policy/actions affect employee commitment? (*of LGB, of trans, of non-LGBT*)

How important is developing employee commitment to the organisation?

4 Development of policies and practices: trans

ASK ALL WITH TRANS POLICY/TAKING ACTION

When did you first start developing a policy (or action) explicitly in respect of transgender? *very approximate is fine*

Why did you start developing policy (or action) on transgender?

What prompted this? *get full details*
- trans recruit
- employee transitioning
- specific incident(s)/case(s) *what*

Why didn't you do so previously?
- didn't think about *try to get to explain*
- no reason to *why not? (no trans employees?)*
- no trans employees (*how do you know this?*)
- expected/actual resistance from employees, line managers, senior management, trans staff;
- assumptions that others would not like it (customers, clients, locality, general industry, potential recruits)
- costs (*what*? developing policy, specialist staff, practices, training….);
- lack of knowledge (*what?* of the issues, relevance to the workplace, what to do, how to do it….)
- difficulties of doing it, *explain*
- lack of evidence of needs (*what*) or benefits
- Legal knowledge/constraints: lack of understanding of legal responsibilities; fear of doing the wrong thing. *is this worse than for other strands? Why? What's the problem?*

ASK ALL WITH TRANS POLICY/TAKING ACTION OR HAD THOUGHT ABOUT DOING SOMETHING

Did you expect any problems?

prompt for differences across the organisation (by location, type of business, size, e.g. HO and branches) and in follow ups. Why differences?

What?

Did this influence taking action *(when, the approach taken…..)*

Did the problems materialise?

How avoided/overcome (or not)

Did you expect any cost?

What? – *distinguish between transitional and permanent*

- *costs of developing policies and practices*
- *costs of implementing policies (training etc.)*
- *getting information*
- *customer response*
- *workforce resistance/poor IR*

Did this influence taking action *(when, the approach taken…..)***)**

Did the costs materialise? *why not?*

Did you expect any benefits from addressing trans issues?

What?

Did this influence taking action *(in what way? when, the approach taken….)*

Did they materialise?

Have there been any other benefits?

Staffing: *recruitment, retention, morale, IR, productivity, skill development, promotion, absence/sickness*

Customers/products: *understanding of customers, product development, customer response, public sector (or other) procurement demands (including Equality Bill)*

Do you think that your trans policy/actions affect employee commitment? (*of trans, of non-LGBT*)

How important is developing employee commitment to the organisation?

5   Current policies and practices

ASK ALL WITH LGB POLICY/TAKING ACTION

> **Could you briefly describe the current policies and practices you have in place to make your workplace more LGB-friendly.**
>
> *Throughout check if everything is done for LGB or is there anything which is just for one or two of these? If not for all, find out why.*
>
> Prompt for:
> - targeted recruitment
> - career development initiatives
> - community events
> - support for high profile LGB activities (e.g. LGBT History month)

ASK ALL WITH TRANS POLICY/TAKING ACTION

> **Could you briefly describe the current policies and practices you have in place to make your workplace more trans-friendly.**
>
> Prompt for:
> - targeted recruitment
> - career development initiatives
> - community events
> - support for high profile LGB activities (e.g. LGBT History month)

ASK ALL

TRAINING

Do staff get equal opportunities (or diversity) training?

> **Who to?** *all staff, managers, recruiters, others (explain)*

Does the training cover LGB/sexual orientation specifically?

> **Who to?** *all staff, managers, recruiters, others (explain)*

Does the training cover transgender/transsexuals

> **Who to?** *all staff, managers, recruiters, others (explain)*

MONITORING

Is monitoring of equality groups done?

> **Is this the same for LGB/sexual orientation as for other groups?** *If not, why not?*

> **Is this the same for transgender/transsexuals as for other groups?** *If not, why not?*

NETWORKS

Do you have a LGB or LGB & T network(s)? *Which (LGB, LGBT, L, G, B, T…)?*

6   Current situation – ASK ALL

How LGB-friendly do you feel that your organisation is?

> **Why?**

> *prompt for differences across the organisation (by location, type of business, size, e.g. HO and branches) Why differences?*

Have any issues have arisen in relation to LGB (in general or in relation to employees), *including bullying, harassment, claims for discrimination,*

> **Was this before or after taking actions?**

How much difference do you think your policies and practices have made to this?

Do you currently have any LGB employees?

How Trans-friendly do you feel that your organisation is?

> **Why?**

> *prompt for differences across the organisation (by location, type of business, size, e.g. HO and branches) Why differences?*

Have any issues have arisen in relation to trans (in general or in relation to employees), *including bullying, harassment, claims for discrimination,*

> **Was this before or after taking actions?**

How much difference do you think your policies and practices have made to this?

Do you currently have any trans employees? Have you previously had any?

7   Support needs – ASK ALL

Have you used any external sources of information or support to develop your LGB policies and practices?

> *What for,*
> *type of information/support, sporadic/ongoing,*
> *from where*

How good has this been?

How easy was it to find the right information/support?

Have you felt the need for support but not sought it?

> **What for?**

> **Why not sought?**

Are there any areas in which you have not been able to get suitable support/information. *Detail*

Any other problems in gaining information/support?

Do you think there is anything that the government (or departments or agencies) could do to help you to do more? *Explain*

Do you think there is anything that the government could do to get other employers to do more? *Explain*

Have you used any external sources of information or support to develop your TRANS policies and practices?

> *What for,*
> *type of information/support, sporadic/ongoing,*
> *from where*

How good has this been?

How easy was it to find the right information/support?

Have you felt the need for support but not sought it?

> **What for?**

> **why not sought?**

Are there any areas in which you have not been able to get suitable support/information. *Detail*

Any other problems in gaining information/support?

Do you think there is anything that the government could do to help you to do more? *Explain*

Do you think there is anything that the government could do to get other employers to do more? *Explain*

Appendix 3: Organisations providing support to employers

Table A. 1 Organisations providing support to employers: LGB and T and other agendas

Advisory, Conciliation and Arbitration Service (ACAS)	**http://www.acas.org.uk/**	**Euston Tower, 286 Euston Road, London NW1 3JJ 08457 474747**	**GB**
	Main functions of the organisation Aims to improve organisations and working life through better employment relations. Promotes best practice in the workplace through easily accessible advice and services. Provides advice and guidance on employment and work policies to the Government and social partners (trade unions and employers or their representative organisations).	**Type of support to employers** Publications (on-line and hard copies), including *Guidance on Sexual Orientation in the Workplace*. Produced a joint report with CIPD. On-line assessment tool. Training courses focussing of equality and diversity within the workplace both in an open conference setting and tailor made for specific companies. Run the Equality and Diversity Advisory Service which visits businesses and helps recommend the best way forward in terms of equal opportunities policies, recruitment systems, monitoring and targets, training programmes and dealing with harassment.	**Charge to user** Web information and publications are free. Training courses charged (e.g. £60-£400 per person in London). Visit from advisory service is free. Bespoke business solutions very much company dependent. (Largely funded by BIS.)
Chartered Institute of Personnel and Development (CIPD)	**http://www.cipd.co.uk/default.cipd**	**151 The Broadway, London SW19 1JQ, UK 020 8612 6202**	**Europe**

	Main functions of the organisation A professional body with over 135,000 members. Promotes good human resource management. Provides support, training and accreditation.	**Type of support to employers** Short training courses on diversity in the workplace and bespoke in-company solutions. Information on website. Very brief for non-members. Produced a joint report with ACAS.	**Charge to user** For 1 Day Equality + Diversity course: Non-Member £545 + VAT Members £490+ VAT. Access to detailed web information restricted to members.
Equality and Human Rights Commission (EHRC)	**http://www.equalityhumanrights.com**	**3 More London, Riverside Tooley Street, London, SE1 2RG 020 3117 0235 (London Office)**	**GB**
	Main functions of the organisation A statutory body that has the responsibility to protect, enforce and promote equality across the seven "protected" grounds.	**Type of support to employers** Not so much a supporting body – do offer some guidance about legislation and acts as a useful collection of legislation but is primarily interested in securing legislative framework and enforcement.	
Federation of Small Businesses (FSB)	**http://www.fsb.org.uk**	**Sir Frank Whittle Way, Blackpool Business Park, Blackpool FY4 2FE 01253 336000**	**UK**
	Main functions of the organisation UK's largest campaigning pressure group promoting and protecting the interests of the self-employed and owners of small firms. Formed in 1974, it now has 215,000 members across 33 regions and 230 branches.	**Type of support to employers** Assistance provided to members only. Free legal advice on employment issues 24/7. Provide sample documents to help draft employment policies.	**Charge to user** Membership fee graduated by no. of employees: e.g. 5-10 employees = £300

Table A. 2 Organisations providing support to employers: LGB and T only

Intercom	http://www.intercomtrust.org.uk/	Main Office: 01392 201015	South West
	Main functions of the organisation To highlight the importance of intercommunication: intercommunication between isolated LGB people and community-led sources of support, and intercommunication between LGB people and the big public authorities , such as schools, local government, health and the criminal justice system. Six members of staff + volunteer core.	**Type of support to employers** Training: LGB and T Intercom staff and volunteers have provided general and specialised awareness training and workplace training on LGB and T community issues on countless occasions since 1997. Consultancy: provided specialist consultancy for many organisations, working with them to enable community consultation, improve their draft policies and strategies, and, above all, to mainstream equality and fairness for LGB and T people throughout their service-delivery systems.	
LGB and T Excellence Centre (Wales)	www.ecwales.org.uk	60 Walter Road, Swansea ORGANISATION1 5PZ 01792 645 325	**Wales**
	Main functions of the organisation Gathers and shares excellence, information and good practice for LGB and T people as well as organisations that want to achieve better equality and human rights.	**Type of support to employers** Training, including some for employers wanting to make their workplaces more LGB and T-friendly. Consultations with employers. Free accreditation scheme the Rainbow Mark – criteria set by Excellence Centre and supported by the Welsh Assembly	**Charge to user** For business specific programme: £75 per person in voluntary sector £150 per person in public and private sectors for a one day course.
Stonewall Scotland[a]	www.stonewall.org.uk/scotland	9 Howe Street, Edinburgh EH3 6TE 0131 557 3679	**Scotland**
	Main functions of the organisation See Stonewall	**Type of support to employers** Consultancy via the Diversity Champions programme, benchmarking for LGB and free publications. Publication on transgender	**Charge to user** See Stonewall
Schools Out	www.schools-out.org.uk	BM Schools OUT, London, WC1N 3XX 01582 451424	**UK**

| | Main functions of the organisation To provide both a formal and informal support network for people who want to raise the issue of homophobia, transphobia and heterosexism in education. To campaign on lesbian, gay, bisexual and trans issues as they affect education and those in education. To research, debate and stimulate curriculum development on LGB and T issues. | Type of support to employers Chrysalis training programme: - LGB and T/Sexual Orientation Provide Awareness Training workshops on all 5 Equality areas for front line staff, Managers & ORGANISATION. - Awareness workshops for front line staff in schools and other organisations. - LGB and T related sex and relationships education for schools, colleges and universities, and youth organisations. | |

a Stonewall Scotland is part of Stonewall. Stonewall is a devolved organisation, comprising Stonewall Cymru, Stonewall England and Stonewall Scotland. The first two cover LGB only, the last LGB and T.

Table A. 3 Organisations providing support to employers: sexual orientation

The Lesbian and Gay Foundation	http://www.lgf.org.uk/	Princess House, 105–107 Princess Street, Manchester M1 6DD 0845 3 30 30 30	UK
	Main functions of the organisation Provides direct services and resources to LGB people.	**Type of support to employers:** training and consultancy - flexible in nature, tailored to specific organisations. Equality and diversity is covered more broadly, but LGB is the main focus.	**Charge to user** Training usually from £400 per half day, £800 full day with up to 20 participants. Consultancy more work dependent but anywhere from £75-£150 p/h
The Southwest LGB Network	http://www.equalitysouthwest.org.uk/our-networks/sexual-orientation.html	Equality South West, East Reach House, East Reach, Taunton, Somerset, TA1 3EN 01823 250833	**Southwest of England**
	Main functions of the organisation Brings together individuals and organisations to work on issues relating to LGB equality. Aims: A greater awareness of LGB issues; All organisations to eliminate discrimination against LGB people in their policy and practice; Involvement from LGB people in related events and activities around the region, and; The positive promotion of Equality, Diversity and Human Rights. Facilitated by Southwest Equality Network	**Type of support to employers** Network allowing easy access to resources and communication between organisations including unions.	

Stonewall[a]	http://www.stonewall.org.uk/workplace/1477.asp	Tower Building, York Road, London SE1 7NX 020 7593 1850	England and Wales
	Main functions of the organisation Very wide-ranging, all with a view to eliminating discrimination against, and supporting lesbian, gay and bisexual people: Policy and Research Publications Parliamentary consultation Publicity Events Work with schools Work with employers Free information service.	**Type of support to employers** Stonewall Workplace (special branch of organisation) *Most notably provide tailored advice and support to organisations on gay, lesbian and bisexual diversity and equality through Stonewall Consult. *Benchmarking of employers by LGB-friendliness. *Annual Stonewall Workplace Conference which celebrates the best practice seen by members of Stonewall's Diversity Champions programme. *Provide workplace guides and publications *Ranks according to Workplace Equality Index *Seminar programme in which speakers from Diversity Champions discuss solutions for LGB problems in the workplace. Ten Workplace associates. 492 enquiries in 2009.	**Charge to user** *Consults from £500-1000 a day *Membership of Diversity Champions programme at £2000+VAT per annum.
Gay Police Association	www.gay.police.uk	**London. WC1N 3XX 07092 700 000 (24hrs)**	**Police, UK**
	Main functions of the organisation · Work towards equal opportunities for gay police service employees · Offer advice and support to gay police service employees · Promote better relations between the police service and the gay community	**Type of support to employers**	

[a] Stonewall is a devolved organisation, comprising Stonewall Cymru, Stonewall England and Stonewall Scotland. The first two cover LGB only, the last LGB and T.

Table A. 4 Organisations providing support to employers: trans

a:gender	http://www.agender.org.uk/index.asp	http://www.agender.org.uk/Contacts.asp	Civil Service, its agencies and associated departments and offices
	Main functions of the organisation a:genda is a network of transsexual/transgender and intersex staff across the civil service, its agencies and associated departments/offices. It aims: • to provide advice and information for Departments • to liaise between government departments and external providers of support • to provide advice and support for staff who are being harassed and discriminated against in the workplace. • to hold regular meetings and local contact points for staff who are transitioning, have transitioned, or are about to transition.	**Type of support to employers** Produced guidance for the Home Office about the workplace and gender reassignment.	

Gender Identity Research and Education Society (GIRES)	http://www.gires.org.uk/index.php	Melverley, The Warren, Ashtead, Surrey KT21 2SP 01372 801554	UK
	Main functions of the organisation Information for trans people, their families and the professionals who care for them	**Type of support to employers** "Our policy advice and training services do cover employers' responsibilities towards transgender staff and service users. We do not have a fixed scale of fees. What we do is tailor make the service for each individual organisation and agree a level of fee for the specific assignment that makes economic sense for each client. As an alternative to that, we are now providing services to several major organisations that have become Corporate Members of the charity. For each of them, we provide a range of services paid for out of their individually agreed level of annual subscription." Published information	
The Gender Trust	www.gendertrust.org.uk		**UK, mainly England and Wales**
	Main functions of the organisation Information and support for trans people.	**Type of support to employers** Consultancy and training; planning for transition and follow up (telephone) support over a year.	**Charge to user** Yes – variable

National Trans Police Association	http://www.ntpa.org.uk/NTPA/Home.html	http://www.ntpa.org.uk/NTPA/Contact.html	
	Main functions of the organisation The NTPA exists primarily to provide support to serving and retired Police Officers, Police Staff and Special Constables with any gender identity issue including, but not exclusively, Trans Men, Trans Women, people who identity as 'Transgender', Androgyne or Intersex. Also the NTPA will give support to people who identify as Cross Dressers. The NTPA further aims to provide support to all serving and retired police officers, police staff and special constables who are dealing with people with a gender identity issue whether that person is a colleague, family member or a member of the public involved in a police matter.	**Type of support to employers** Working with Police Forces and the Police Training College on transgender employment and policing issues, for example, a Positive Action Leadership programme course for Trans Police Officers and Police Staff; interaction with Police diversity and LGB&T liaison officers; a LGB&T specific recruitment fair; and working with the police on 'Trans Inclusive Policing'.	**Police, UK**

Press for Change	**http://www.pfc.org.uk/**	**24 Mauldeth Rd, Heaton Mersey, Stockport SK4 3NE**	**UK**
	Main functions of the organisation Lobbying and educational organisation for trans people. Aim to promote better understanding of Transgender and Transsexual equality through the development and dissemination of best practice based on sound research. Formed 1992. Team of four experts/academics. Involved in every major court case on Transgender and Transexual issues since 1992	**Type of support to employers**; Provide legal advice, training and consultancy for employers and organisations as well as undertaking commissioned research and publications.	
Scottish Transgender Alliance	**http://www.scottishtrans.org/**	**http://www.scottishtrans.org/Contact.aspx**	**Scotland**
	Main functions of the organisation Guidance to service providers and employers on transgender equality issues and good practice in Scotland. It also provides information to support transgender people in understanding and accessing their human rights. Part of the Equality Network	**Type of support to employers** Predominantly advice on their website - list of publications, advice on good practice, rights of employees and an explanation of the 'Transgender Umbrella' with explanations of terms etc..	**Charge to user** Free. Funded by Scottish Government

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