

Recording customers' personal information and equality monitoring

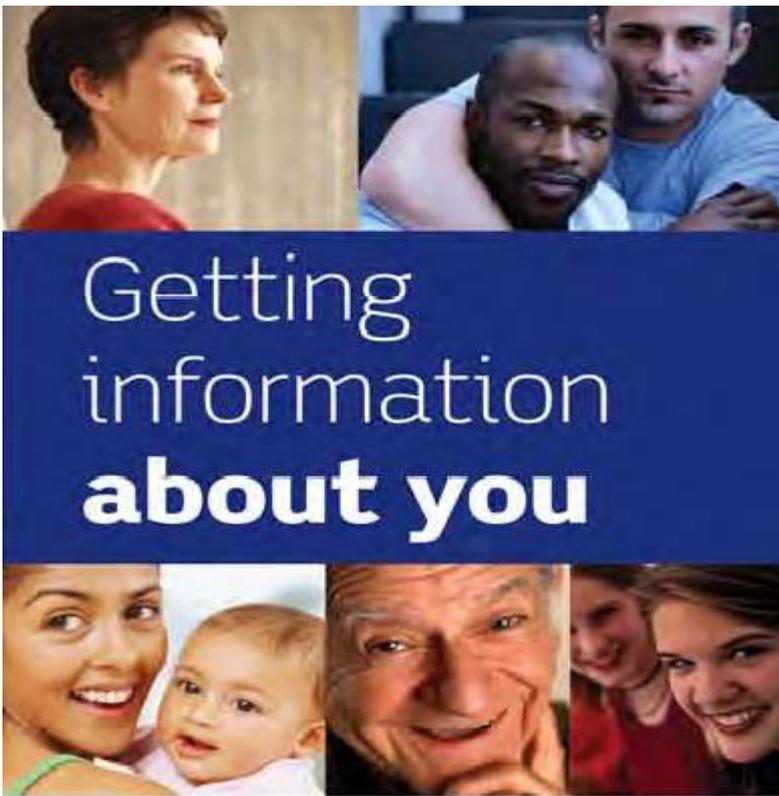


Your responsibilities as a manager and a provider of services

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1.0 Why we record personal information about customers



1.1 Introduction

The services we provide have a big effect on the quality of life of people in Sheffield. Our services provide care, housing support and key life opportunities; they help to keep people safe and secure and build stronger communities and develop personal independence. What we do affects people today and also future generations.

It is because of the significance and impact of what we do that we need to know who is benefitting from our services and which groups are missing out.

For many services we can see, from customers' home address, the level of take-up across the city. However, we know a lot less about whether certain age groups or disabled people or from a specific ethnic community are accessing services that would help them and how decisions we make impact on them.

There is a separate leaflet available for members of the public at www.sheffield.gov.uk/equality.

1.2 Our responsibilities

This guidance outlines what we should be doing in order to comply with legislation but also how we deliver on our commitments to provide services in a fair and equal way to all our customers.

- All staff need to understand what their responsibilities are when collecting and handling personal information about customers.
- They need to know why we do it, the restrictions on how and when it is done.

This guide includes information about the standards and protections we need to apply in order to ensure that we only ask what is necessary, and we use it sensitively and keep it secure.

1.3 Understanding our customers

Monitoring who contacts us and recording their personal circumstances lets us analyse how well we are meeting our commitments to different groups of customers.

Research such as the Census provides a profile of the population of Sheffield that enables us to compare who actually requests and receives services against this.

We also have a number of [Community Knowledge Profiles](#) that can be downloaded from our website.

1.4 Using information to personalise access and service provision

Analysing information gathered helps us to identify and consult groups that do not access our services:

- Understand why services do not meet their needs.
- Improve delivery of services making it easier for all groups of customers to access services

For example, we have used customer information to:

- Write easier to understand information for people with learning disability or literacy problems
- Adapt buildings so they are accessible for people with impaired mobility
- Increase the number of services that can be accessed 24 hours a day online for those who find it difficult to contact us during office hours or visit our offices.

1.5 Legal requirements

The Equality Act 2010 replaced the existing anti-discrimination laws with a single Act. The Public Sector Duty applies to all organisations that provide a service to the public. It also applies to anyone who sells goods or provides facilities and applies to our services, whether or not a charge is made for them.

The duty requires public bodies to understand the needs of their customers and demonstrate equality in the design of policies and the delivery of services.

A public authority we must pay due regard to:

- Eliminate discrimination, harassment, victimisation
- Advance equality of opportunity
- Foster good relations

Practising equality of opportunity involves:

- Removing or minimising disadvantages
- Taking steps to meet the needs differing needs
- Encouraging people to participate in public life/activity where participation is disproportionately low

Fostering good relations means:

- Tackling prejudice
- Promoting understanding
- Meeting the needs of disabled people in making reasonable adjustments

Compliance with the duties may involve treating some persons more favourably than others.

The relevant protected characteristics (pc) are: age; disability; gender reassignment; pregnancy and maternity; race; religion or belief; sex; sexual orientation and marriage/civil partnership status* (relates to eliminate discrimination only) so the law protects everyone.

The Specific Duties require public bodies to set equality objectives, publish information annually to demonstrate compliance with the General Duty and publish information relating to our employees and people impacted by our policies such as customers. Monitoring information will help enable us to meet these Duties. For more information visit our www.sheffield.gov.uk/equality.

To find out more about the Equality Act 2010 visit the Home Office or Equality and/or Human Rights commission websites:

- <http://homeoffice.gov.uk/equalities>
- www.equalityhumanrights.com/legal-and-policy/equality-act

This guidance relates to customers and not employees. See the website for staff diversity. www.sheffield.gov.uk/equality

2.0 Getting started

Tell us what you think
Child's Club and Household Family Storage: Making a difference together

Thank you for your interest in helping improve our services. We have suggested some questions on our website which provide a helpful guide to the form. Please complete at least 10 of the questions below to give us the best idea of what you think. Please email us at Feedback@ccf.co.uk if you have any questions.

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Question	Answer
1. How often do you use the club?	
2. How often do you use the household family storage?	
3. How often do you use the club and household family storage together?	
4. How often do you use the club and household family storage together?	
5. How often do you use the club and household family storage together?	
6. How often do you use the club and household family storage together?	
7. How often do you use the club and household family storage together?	
8. How often do you use the club and household family storage together?	
9. How often do you use the club and household family storage together?	
10. How often do you use the club and household family storage together?	

CCF
Child's Club and Household Family Storage

2.1 What and when to monitor

Customer insight and equalities monitoring should only be undertaken where you are confident that you can gather useful information that will be acted upon.

Customers should not be asked for personal information unless the information is going to be used to improve services or reveal possible inequality of access.

Therefore it is important to understand the difference between

what you are going to record to help you understand who uses your services to help monitor whether the needs of groups of customers are being met.

and
personal information that you need to collect to meet the individual customers and provide a personalised service or /access to service

For example

- For equality monitoring it is sufficient to know that the customer is disabled and has a hearing impairment
- For service delivery purposes you would need to know how it is best to contact them and what arrangements may be needed to access and receive a service.

Monitoring Information should be collected (and stored) separately from the personal information recorded to identify individuals' service needs.

You should not ask people for their names or identifiable personal information etc on the same form as monitoring information.

Heads of Service and Service Leadership Teams should lead the service in deciding what the priorities for collecting. This gives staff and managers a clear reason for asking customers for the information

It is important that customers understand the reason why they are been asked for the information, they know what the information will be used for and understand that the data will be stored confidentially.

Judgement needs to be applied on a case by case basis as to when it is appropriate to collect personal information. Ask your Portfolio contact for advice as required (see [Appendix 4 – Contacts](#)).

2.2 What to consider and plan for at the start

Where services do not currently collect and use monitored information they should commit to carrying out at least one survey in the next half year. 5% minimum customer base would be expected, which could be built on. Here are ten action points to help services plan the exercise.

Senior Leadership Teams

Review what Equalities and Customer Insight information they currently collect from customers. (Refer to list in [Appendix 1 – Sheffield City Council equality monitoring form.](#))

Decide on what personal information is a priority for monitoring over the forthcoming year - in order to comply with legal duties and to fill gaps in specific areas customer insight and commit to act on. (See [Appendix 3 – Examples of what you might measure.](#))

Determine the sample size (the number of customers you need to monitor) to enable sound conclusions to be drawn. Check that the skills and resources to collect and analyse the data are available.

Communicate a clear explanation of what the services will need to monitor and why, in a way that will be understood by staff and customers.

Service Managers

Decide what monitoring will take place in their service in consultation with staff who will be recording it and their line managers.

Identify which items of personal information cannot be asked about and use this exercise to demonstrate good practice in Information Management complying with Council policies and procedures for handling personal information.

Be responsible for ensuring the information is collated and used as planned.

Team Leaders / First Line Managers

Plan the practical steps - what will be monitored and how.

Communicate to staff what they need to do and what the various areas of personal information mean (Use [Appendix 2 – Understanding terminology and categories of personal information](#).) Also explain customers' right to refuse to answer questions and the circumstances when personal information should not be recorded.

Collect and review feedback from staff on their experience of collecting the data and ensure that they receive the outcomes of the monitoring exercise.

2.3 Choice of contact method

Monitoring can be undertaken in a variety of different ways and at different points in your interaction with customers. Examples include:

In writing

Anonymous surveys, which are sent to customers to ask about their satisfaction with a service is one of the most effective ways of capturing monitoring information. It can often have the highest rate of completion and return as it gives customers the opportunity to express their views on the service received.

Face to face

Confidentiality is often an issue when asking equality monitoring questions in public offices. Customers should never be asked monitoring questions if they are in an environment where their responses will be overheard by other customers or staff. It may be more suitable to ask customers to fill in a form themselves and place the completed form in a sealed envelope or response box and if the survey can be anonymous this increases completion rates.

Over the phone

Service teams can also conduct telephone surveys and record customers information as part of this process.

Customer Relationship Management IT system (CRM)

When the Council's CRM is operating there will be a facility to record this information against customer's records. The system could provide a significant resource to extract profiles of customer insight information. However this information will need to be kept separate and confidential being stored and would only be accessed by authorised staff.

3.0 Using the data



*AHC relative income poverty Source: Households Below Average Income, Department for Work and Pensions
The graphic shows the groups at highest risk of poverty, with other groups included for comparison.

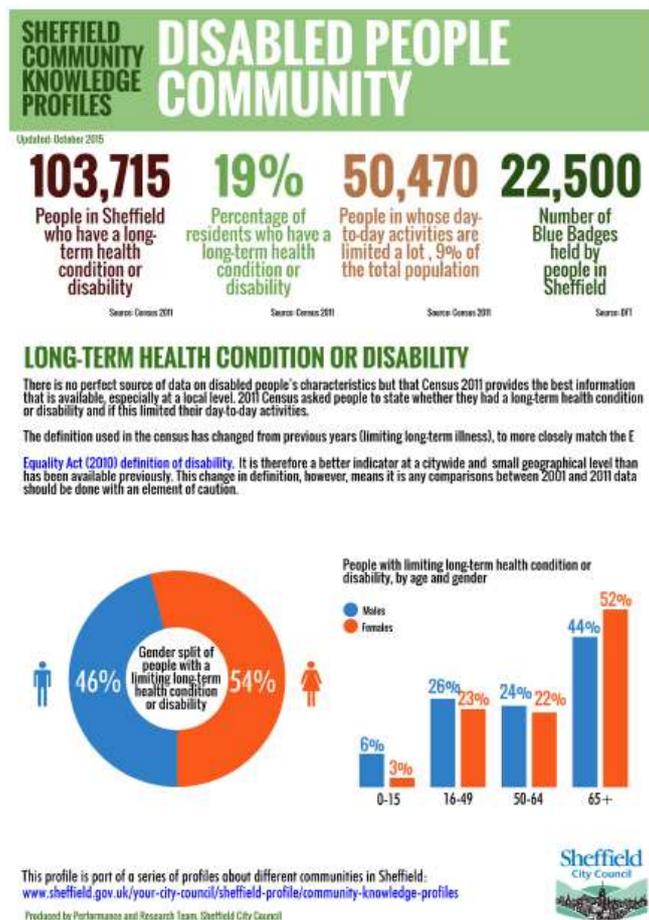
3.1 Making use of the data

Where to find comparative data

Our website provides a wide range of statistics and information about Sheffield that could be useful in setting targets or looking for comparisons in monitoring.

We have city profiles, neighbourhood profiles, information on health, education, economy and housing etc. There are also links to [national data](#).

We also have a number of [Community Knowledge Profiles](#) that can be downloaded from our website.



3.2 Suggested ways to use the analysed data

Monitor your plan in your Equality Impact Assessment.

We need to be able to demonstrate what has happened as a result of service changes and identified risks or benefits to specific customer groups.

At a time of significant change in service provision and eligibility it is important to understand the effect of decisions on different customer groups.

Where specific concerns are raised about the impact of a change then those need to be followed through and the impact assessed over a period of time.

To set targets

Equalities/customer monitoring is an important mechanism for improving the council services, but it is a means to an end, not an end in itself. It is essential that action is taken following the analysis

of the data and changes are made to improve services to ensure that service improvement occurs and service areas can set targets.

These should be:

- validated by the analysis of the data
- achievable, so that expectations are not raised too high
- realistic, so that they are capable of changing the service
- time-bound, so that it is something which needs to be reached by a certain point in time

Gain further insight into customers' needs and preferences

Analysis of customer information may show the need for further consultation and involvement with members from a particular community or type of customer.

Identifying variation in take up or awareness of services does not automatically suggest an answer to the problem.

Monitoring provides a focus for consultation of these customers, helping understand better why variations occur and to involve them in the design of more accessible service provision.

Include data in your performance indicators

Targets are an indication of what type of service you are aiming to deliver. Performance indicators are about what is currently being delivered.

For example, if equalities monitoring indicates that a service is discriminatory towards women, then a target could be to increase female usage of the service by an appropriate percentage.

4.0 Summary of key guidance

- Monitoring equalities information is important as legislation imposes specific duties and obligations on services to demonstrate that we advancing equality, eliminating discrimination and fostering good relations for all protected characteristics under the Equality Act 2010.
- Anyone recording customers' personal information needs to understand that this is different from collecting information about an individual's personal needs or circumstances as part of service eligibility or assessment process.
- You must have a plan of how you are going to report on the recorded information.
- You need to check the relevance of asking about the specific items of personal information, take account of the nature of your service
- Your plan needs to identify the most appropriate method of obtaining the information.
- You need ensure that what you do complies with our Information Security rules about collecting storing and reporting on personal information.
- You should be able to show at the end of a period of time how the information you have collected has been used to develop services, reduce discrimination or advance equality.
- If you are asking for a title, such as a prefix please add Mx as a gender neutral option. We have agreed as a Council to add this whenever we ask the question. However the title question itself is option.
- This guidance does not cover legal responsibilities for monitoring your workforce but the questions are similar.

Appendix 1 – Sheffield City Council equality monitoring form

We want to make sure that our services are provided fairly and to those who need them. The information collected helps us get a picture of who contacts us, uses or does not access our services, so will help us improve what we provide and reduce potential barriers to access.

Please answer the questions below by ticking the boxes that you feel most describes you. Some questions may feel personal, but the information we collect will be kept confidential and secure. The better the information is that we collect the more effective our monitoring will be.

If you do not want to answer any specific question then please leave it blank.

Ethnicity

White

- English/Welsh/Scottish/British/Northern Irish
 - Irish
 - Gypsy/Irish Traveller
 - Roma
 - Other White background (please state below)
-

Asian or Asian British

- Indian
 - Pakistani
 - Bangladeshi
 - Chinese
 - Other Asian background (please state below)
-

Black or Black British

- Caribbean
 - Somali
 - Other African
 - Other Black background (please state below)
-

Other ethnic group

- Yemeni
 - Other ethnic group (please state below)
-

Mixed/multiple heritage

- White and Black Caribbean
 - White and Black African
 - White and Asian
 - Other mixed background (please state below)
-

Age

- 15-18
- 19-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65-74
- 75-84
- 85+

Sex

- Female
 - Male
 - Other (please state below)
-

Gender identity

Is your gender identity the same as the gender you were assigned at birth?

- Yes
- No

Caring responsibilities

A carer is someone who provides unpaid support/care for a family member, friend, etc who needs help with their day-to-day life; because they are disabled, have a long-term illness or they are elderly.

Are you a carer?

- Yes
- No

Childcare responsibilities

Do you have unpaid responsibility for children as a parent / grandparent / guardian, etc.?

- Children aged 0 to 4
- Children aged 5 to 10 (primary)
- Children aged 11 to 18 (secondary)

Are you pregnant or have you given birth in the last 26 weeks?

- Yes
- No

Disability

A disability is an impairment that has (or is likely to have) a substantial (more than minor), adverse, long-term (more than a year) effect on the ability to carry out normal day-to-day activities.

Do you consider yourself to be a disabled person?

- Yes No

If you have answered 'yes', please tick the box(es) below that best describe your impairment. This information helps us improve access and remove barriers to our services.

- | | |
|---|---|
| <input type="checkbox"/> Communication, eg speech | <input type="checkbox"/> Developmental, eg dyslexia |
| <input type="checkbox"/> Hearing, eg profound to mild deafness | <input type="checkbox"/> Impaired memory/concentration or ability to understand, eg stroke, dementia, head injury |
| <input type="checkbox"/> Learning, eg Downs syndrome | <input type="checkbox"/> Long-term illness or health condition, eg cancer, HIV, diabetes, chronic heart disease, rheumatoid arthritis, chronic asthma |
| <input type="checkbox"/> Mental ill health, eg bipolar disorders, schizophrenia, depression | <input type="checkbox"/> Mobility or physical, eg walking, dexterity |
| <input type="checkbox"/> Visual, eg blind or partial sighted | |
| <input type="checkbox"/> Other (please state below) | |
-

Relationship status

- | | |
|---|----------------------------------|
| <input type="checkbox"/> Civil partnership | <input type="checkbox"/> Married |
| <input type="checkbox"/> Co-habiting | <input type="checkbox"/> Single |
| <input type="checkbox"/> Other (please state below) | |
-

Religion/belief

- | | |
|---|-----------------------------------|
| <input type="checkbox"/> No religion | <input type="checkbox"/> Buddhist |
| <input type="checkbox"/> Christian | <input type="checkbox"/> Muslim |
| <input type="checkbox"/> Jewish | <input type="checkbox"/> Sikh |
| <input type="checkbox"/> Hindu | |
| <input type="checkbox"/> Other (please state below) | |
-

Sexual orientation

- Bisexual
 Gay man
 Lesbian/gay woman
 Heterosexual/straight
 Other (please state below)
-

Postcode

(First part of code only, e.g. S1)

Residency

Are you a British/United Kingdom citizen?

- Yes No

Are you a national of another country?

- EU national
 Other (please state below)
-

- Refugee Asylum Seeker
-

Employment status

- Student
 Employed/self-employed
 Not employed and looking for work
 Not employed and not looking for work
 Apprenticeship scheme/training
 Retired
 Other (please state below)
-

Service personnel and their families

Are you currently serving or a veteran in the UK Armed Forces? Yes No

Are you a member of a serviceman or women's immediate family? Yes No

Are you a reservist or in part time service such as in the Territorial Army? Yes No

Please tell us any other considerations you would like us to know.

Appendix 2 – Understanding terminology and categories of personal information

This section of the guidance is the longest. It seeks to clarify some of the terminology around equalities and customer insight categories and help understand definitions of terms such as disability or ethnicity etc.

We have used, as far as possible, definitions cited in legislation or what nationally recognised agencies recommend as appropriate wording. It is important that staff recording personal information understand, sufficiently, what these categories are asking about, so that they feel confident to explain them to members of the public.

Protected characteristics

The Equality Act 2010 protects people from discrimination on the basis of 'protected characteristics' (these used to be called 'grounds'). The relevant characteristics for services and public functions are:

- age
- disability
- gender reassignment
- pregnancy and maternity
- race – this includes ethnic or national origins, colour and nationality
- religion or belief
- sex
- sexual orientation
- marriage or civil partnership* (only relates to discrimination).

At the end of the guidance there is a list that can be used by all services as a standard template to record customer insight information. However you always need to decide whether all of the information headings are needed and how you are going to use the data it will provide. The standard template ensures consistency in what we record and that we use the same wording in the questions.

Ethnicity

This category includes various descriptions of race and ethnicity. Some of the categories are in terms of nationality, ethnic or racial group, others skin colour, heritage based on the ethnicity / skin colour of parents.

These categories have been chosen because they are the ones used by government in the Census, therefore enabling us to compare with national data. The groups included in our list are based on the profile of the population of Sheffield. In a number of cases the wording used is what members of these communities have told us is most meaningful to them.

We have also added additional categories relevant to Sheffield such as Somali and Yemeni

The form uses a mixture of terms such as "Welsh"; to "Arab"; "African" "Black"/ "White", "Irish Traveller". As with other questions these may create a situation where an individual could be in more than one category, in which case the person answering should decide how they wish to record this.

We have added a category of "Roma" in the "Race - White" box, even though it is an ethnic group whose roots that extends beyond the boundaries of Europe.

Language preference

This monitors use of different preferred spoken languages enabling us to more precisely predict demand for specific interpreting services and understand how to reach certain communities more effectively.

This category includes British Sign Language (BSL) for deaf customers, the monitoring of which can help assess need for interpreters who can sign.

Sexual orientation

Sexual orientation monitoring is sometimes seen as a sensitive area to ask customers about, however the reasons for monitoring sexuality are the same as for other equality areas.

There are a number of key issues to consider in relation to sexual orientation monitoring:

- Generally lesbians, gay men and bisexual people welcome the inclusion of sexuality monitoring within service planning and delivery. However, some may not feel safe declaring their sexuality. You will need to ensure that information is collected, collated and stored confidentially.
- People of different generations may use different language to define their sexuality. For example, some older people may define themselves as homosexual rather than lesbian or gay and some younger people may prefer to identify as queer/ or questioning etc. There are a variety of ways for people to identify that's may also be offensive to others so we always include 'other' so people can tell us how they prefer to identify.
- It is important to include heterosexual in order to ensure that all sexual orientations are covered.
- People carrying out monitoring need to do so appropriately and sensitively.

Sexual orientation monitoring should not generally be asked on surveys of customers under the age of 16, unless it's a younger persons service and relevant. For monitoring under 18 always include an unsure/ questioning response as well as other.

You may be concerned that people will object to questions on sexual orientation being asked. Sometimes people do object to any type of monitoring but the option not to fill in any of the sections should be made clear and never just said in reference to sexuality.

You should never make an assumption about a person's sexual orientation based on appearance. You should always ensure that the customer is the one who selects the category they feel defines their identity. For more information visit the LGBT organisation website: www.stonewall.org.uk.

Religion and belief

Religion and belief can also be a sensitive area to ask about. On our form we use the same categories as used in the Census, however any other religions and faiths can be captured in the "Other (Please state)" section.

For purposes of the equality monitoring form Jewish is an option within the religion and belief section rather than the ethnic origin section as this mirrors the categories within the Census. If an individual describes their ethnic origin as Jewish, this can be recorded in the "Other ethnic groups" section on the monitoring form.

You should never make an assumption about a person's religious background based on race or appearance and when monitoring you should always ensure that the customer is the one who selects the category they feel defines their identity.

More information on religion and belief issues can be found at the Equality and Human Rights Commission website: www.equalityhumanrights.com.

Gender

Monitoring is important to make sure that women and men are treated equally in the provision of goods and services. This is sometimes called gender. We can provide gender specific services where appropriate. You may decide to look at it as an important factor on its own or also alongside other categories (sex and age or caring responsibility; ethnicity).

If you are asking for a title, such as a prefix please add Mx as a gender neutral option. However the title question itself is optional.

Gender identity

In addition there is the important area of gender identity that has not previously been recorded.

Gender identify means a person's internal sense of being a man or woman or boy or girl. For transgender people, their gender identity does not match the sex they were assigned at birth. A transgender or transsexual person is someone whose gender identity is not his or her biologic sex, or sex assigned at birth.

Asking about gender identity for transgender people can be a sensitive area. The question we have included is "Is your gender identity the same as the gender you were assigned at birth?" You need to have identified a clear purpose for how you are going to use the information when you decide to include 'trans' monitoring. Anxiety about this scenario may also inhibit people from identifying themselves.

The number of transgender customers in Sheffield is relatively small and there is a risk that individuals could be identified. This could jeopardise the privacy and safety of people (including those who are not trans but might be perceived to be).

Remember that many trans people (especially those who have the protection of legal gender recognition) may not wish to be identified as having a trans history. Any process which leads to their identification could lead to prosecution under [Section 22 of the Gender Recognition Act 2004](#) or via the Data Protection Act 1998.

Questions on gender identity should only take place if it is anonymous and kept confidential. See guidance for managers on gender identity in [HR SharePoint](#).

Age

Legislation prevents discrimination in employment and in the provision of goods and services. This does not mean that we can't provide age specific services.

However, there are varying levels of awareness and take up of council services by different age groups and monitoring this is one way of ensuring services are accessible. This is not solely about barriers that older people have in accessing services; it applies to younger people and other specific age groups for different services.

The age bands we have used are based on Census information [2011 Census for Sheffield](#). Please add a further under 15 categories if required.

Disability

By monitoring initial contact from and take up of services by disabled people with particular impairments we can compare this against local and national data and calculate what percentage of local people we are reaching.

Analysing the feedback from customers with a particular impairment helps you better understand their experience, needs and preferences. This learning informs the design of more accessible services or provides the basis for further discussion with involvement of disabled people in process or service redesign.

The categories we have used are quite general groupings and as with other questions an individual may fit more than one of the headings. It is for the people answering to state which best describes the nature of their impairment.

It is important to remember that not all impairments are readily identifiable. While some impairments, particularly visible ones, are easy to identify, there are many which are not so immediately obvious, for example some mental health conditions and learning disabilities.

We consulted various disability groups on the terminology and categories in this section and also used definitions and terminology used in legislation and by national data sets.

Caring responsibilities

The Equality Act 2010 extended the definition of direct and indirect discrimination to disability. Therefore a carer can be discriminated against if the person they care for is affected by a decision or policy.

There is now much more information from national surveys about the number of people providing care and their circumstances. Asking customers about their caring responsibilities increases recognition of carers and from this we can develop a better understanding of what support will enable them to continue to provide care. This applies to universal services not just social care support.

By carers we mean people providing unpaid care for family members or friends. It does not apply to people who are paid to care or who do it in a formal but unpaid capacity for a voluntary organisation.

Childcare

This enables us to gain a better understanding of the needs of people who use our services, better plan service provision around different childcare responsibilities or overcome barriers to accessing services.

Service personnel and their family

Men and women currently serving in the UK Armed Forces, their families and also former servicemen and women will need to access our services and also be linked into support from others agencies.

We need to develop our understanding of the needs and particular circumstances of these groups of customers in accessing council or other services. Service history may also link to other categories of personal information collected on the form such as disability, ethnicity, or caring responsibilities.

We want to ensure that members of the Armed Forces and their families are not disadvantaged in their access to service and support by their contribution to or the effect of their service in the Forces.

Armed forces include: Army, Navy, Air force, and reservists such as members of the Territorial Army who have active service. "Families" means partner, dependant child, parent or sibling where they are supporting or supported by service personnel.

Residency

Our commitment to fairness means that wherever an individual lives in the city they have fair access to our generic services. By recording part of customers' postcode it is possible to plot geographical variations in service access and take up across Sheffield. It also offers the opportunity to match various customer insight profiles that the Council has developed.

The inclusion of residency as a question will also enable us to collect information about our new and emerging communities. There have in recent years been increases in the population of migrant workers from Eastern Europe who are moving to Sheffield, as well as asylum seekers and refugees.

If you feel that by collating information on residency it will be beneficial in removing barriers and improving service delivery then this should be included on your equality monitoring.

Knowing how many people are permanent residents and how many are visitors / applying for right to stay will also inform the planning of future provision.

Please note the distinction between a Refugee and an Asylum Seeker.

"For the UK the European Convention on Human Rights defines a refugee as someone who seeks refuge in a foreign country because of war and violence, or out of fear of persecution. (Persecution is defined as "on account of race, religion, nationality, political opinion, or membership in a particular social group" as grounds for seeking asylum.)

Until a request for refuge has been accepted, the person is referred to as an asylum seeker. Only after the recognition of the asylum seeker's protection needs, is he or she officially referred to as **a refugee** and enjoys refugee status, **which carries certain rights and obligations** according to the legislation of the receiving country."

Relationship status

You need to think how this information will enable you to better understand your customer needs and preferences or overcome a barrier to accessing services.

If this question is to be included you should use all of the categories listed on the standard set of monitoring categories form.

Same-sex couples across the UK can either enter into a civil partnership or a marriage.

Employment status

We want to better understand the needs of customers in relation to economic activity; we use information to build the [Community Knowledge Profiles](#) we produce.

We also have a large student population and it's important to understand how the needs in this area impact on service delivery.

Titles

Asking for a title, a name prefix such as Ms or Dr is optional but if you do choose this question you should always include a gender neutral option such as Mx. This is because some people will prefer not to use a gender specific term and others will identify as [non-binary](#).

Appendix 3 – Examples of what you might measure

1. Ongoing contact

This measures people's experience, over a period of time, of using our services. It shows how different groups are treated at different stages of a process, e.g. from first contact through to the final service/ outcome they receive.

An example of where this method may be used might be in processing housing applications to find out if:

- there is a difference in outcomes of applications for different customers
- there is a difference in the perception of service delivery for different groups
- all groups are accessing the service equally
- any action that has been taken to improve the service is working

2. Occasional one-off contact

This looks at what happens when the customer contacts us. An example of where this method may be used is in the processing of planning applications to find out if:

- there are any particular groups that are using the service more than others
- all groups are accessing the service equally
- there are differences in the outcomes of applications for different groups
- there is a difference in the perception of the service for different groups

3. Take up, use of and drop out of services

This can help to assess and allocate the resources needed in the future, and to develop service delivery methods that meet the needs of different groups. An example of where this method may be used is in library or Children's Centre to find out if:

- there are differences in the frequency of usage by different equalities groups
- there are differences in the ways that different groups use services
- Services that are delivered are meeting the needs of the communities they serve
- there is anything you can do to increase usage by those groups that don't use the service

4. Satisfaction, complaints and other feedback

Most satisfaction surveys are anonymous so it makes it easier to ask personal information and is helpful to see the profile of who is responding. When handling and analysing the returned information you need to ensure that individuals are not identified by comments etc.

Using this method services may want to find out if:

- there are differences in the satisfaction levels or complaint rates for different groups customer with different needs or circumstances
- there are particular areas of their service that cause a problem for particular groups of customers
- there is an underlying cause or barrier that means that certain customers are receiving a better service than others and
- whether or not different customers have different expectations of the service

5. Procurement and management of services delivered under contract

Monitoring procurement and contract performance enables you to ensure that services delivered through contracted partners achieve the outcomes that we seek from directly delivered services.

Appendix 4 – Contacts

Council wide

Social Justice and Inclusion Manager – Adele Robinson Tel – 0114 27 35861
equalitiesandinvolvement@sheffield.gov.uk

Portfolios

Equality contacts for each Portfolio are available on the Intranet:
<http://intranet/managers/equality-diversity>

Appendix 5 – Getting Information about you leaflet

Who can I talk to?

If you have any questions or worries about the information we ask for, please tell us. We're happy to talk to you about this.

Do I have to give you information?

No. You don't have to give any information and this will not affect the service we give you.

We may need to ask you questions as part of an assessment. If this happens, we will tell you about the assessment and explain why it's important.

“Buildings and transport can be designed to meet people's different needs, for example ramps in buildings and accessible buses and trams.”

Who do I contact?

If you would like to request access to your personal information please write to

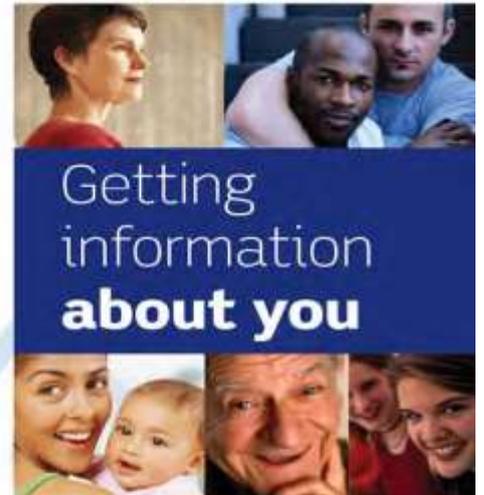
Information Management Team,
Sheffield City Council,
Floor 4,
Derwent House
Arundel Gate,
Sheffield, S1 2JY

or email
informationmanagement@sheffield.gcsx.gov.uk

This document can be supplied in alternative formats, please contact 0114 273 4567

Sheffield City Council
Tel: 0114 273 4567
www.sheffield.gov.uk

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Getting information about you

Why do you collect my information?

By collecting your information we can find out how you are affected by the services we provide and we can try and make sure that we give you the service you need.

Collecting your information helps us to:

- understand you and what you need;
- understand better what action we might need to take;
- find solutions and make changes if we need to; and
- find out if there are unfair differences so we can get rid of them.

We ask you for your information because we can't improve things without your help.

“The Library Service use customer information to make sure that book collections cater for different communities.”

What will you ask me?

We may ask you about your racial group, your sex, your religion or belief, if you have a disability, your age and your sexuality. We may ask you about some or all of these.

We only collect information from you for specific purposes. We will explain this before we ask you so can decide whether to answer. If you have any questions or worries, please ask us.

You won't be asked for any information unless we plan to use it.

“Adult Social Care use customer information to help them identify service users' care and support needs. Customer information is kept confidential and is only shared with other people providing support (such as a family doctor) after they have asked permission from the service user.”

Who can see this information?

We have strict laws about how we look after the information we collect, such as the Data Protection Act. Access to your information is only given to staff that need to offer or provide services to you.

How will you use the information?

We will use the information to see how well our services are working, and to help us make decisions about how we deliver services in the future.

We may need to collect information again for a particular service, but if this happens, we will tell you and explain why we need to collect it again.

“Bereavement Services can make sure that funeral services and facilities cater for all faiths and beliefs because they collect customer information to help them understand different needs.”

