HWEI AS A ROADMAP

Welcome to the Health + Wellbeing Equality Index

Since 2020, the Health + Wellbeing Equality Index (HWEI) has stood as the definitive national benchmarking tool on LGBTQ+ inclusive service delivery, alongside the national accreditation process, the Rainbow Tick. It is comprised of a roadmap, auditing and benchmarking tool, and an engagement survey, by which national standards of best practice for LGBTQ+ inclusion are set. The Index drives best practice in Australia and sets a comparative benchmark for Australian organisations providing health, wellbeing and human services to LGBTQ+ clients. For this reason, the Index has to be comprehensive and rigorous. The work compiled annually by organisations submitting for the Index is a testament to the importance of LGBTQ+ inclusion within their current D&I initiatives.

HWEI as a Roadmap

The HWEI contains a set of criteria that empower organisations to develop their LGBTQ+ inclusive service delivery strategies and action plans, through an evidence-based approach, guided by best practice insights from national and global trends. The structure of the HWEI lends itself to being a benchmarking tool, but also provides an effective strategic opportunity for organisations commencing a journey in improving LGBTQ+ service delivery. Organisations can use the criteria for planning by:

- completing a gap analysis to identify areas that need improvement,
- using a priority-based approach for where to focus activity,
- understand what community and peak organisations are including in assessment of inclusive service delivery to help scope the inclusion initiative.

While some organisations use the criteria solely for planning, others may also have their work audited through the Submission process.

This roadmap walks you through key areas of LGBTQ+ inclusive service delivery practice.

Where do we start?

When it comes to answering the question, "Where do we start?", our answer is always going to be "Get the foundations right first!"

This roadmap is designed to help you set up a plan, using the HWEI Submission criteria as a guide.

These criteria are updated every 3 years to ensure they continue to reflect and drive leading practice; for this reason, we recommend you refer to the latest submission documentation, which can be requested at: HWEI Submission Request (Mar 2024 - Feb 2025) (websurveycreator.com)

The criteria are comprised of 9 sections:

1. Organisational Readiness
2. Marketing and Communications
3. Intake and Assessment
4. Confidentiality and Data Management
5. LGBTQ+ Consultation Engagement
6. Staff Development, Training and Resources
7. Referrals and Stakeholder Engagement
8. Risk Mitigation and Management
9. Continuous Improvement

Within each of these sections there may be both 'foundation' and 'advanced' work.

This roadmap will step you through each section.

1. Organisational Readiness

Do we have a clear strategy and action plan to drive our LGBTQ+ inclusion objectives? Do we have people, structures, and governance in place to support the strategy? Do we have access to appropriate knowledge and expertise?

Since LGBTQ+ people have traditionally been invisible in our services, and Diversity and Inclusion (D&I) is a relatively new and quickly changing area, many organisations have little experience or expertise in LGBTQ+ inclusive service delivery; while they want to do the 'right thing', there could be little knowledge on how to achieve that. Organisations should treat inclusion work like any other strategic imperative, with appropriate objectives, plans, resources, reporting, etc.

Topic	Level	Initiative
LGBTQ+ inclusion strategy	Foundation	We have LGBTQ+ inclusion as part of our organisational strategy, and a documented LGBTQ+ inclusion action plan, aligned with the organisational strategy, which clearly states deliverables, accountabilities, and timelines, that are used to track progress.
External LGBTQ+ expertise	Foundation	We have access to external LGBTQ+ inclusion support/expertise that we can call upon, ongoing, for advice and guidance.
LGBTQ+ working group	Foundation	We have a visible LGBTQ+ or Rainbow Working Group that supports the work of the action plan and assists with promotion and communication of our LGBTQ+ inclusive service provision.
Diversity professional accountabilities	Foundation	We have the following people within our organisation with documented accountabilities for LGBTQ+ inclusion: an Executive Sponsor, LGBTQ+ Working Group Leaders.

2. Marketing and Communications

Do we communicate our inclusion focus outside of our organisation, to service users, suppliers, and other stakeholders? Do we show signs of support within our client spaces? Do our CEO and other Senior Leaders visibly support LGBTQ+ inclusive service delivery within our organisation? Do they advocate for LGBTQ+ inclusion outside of our organisation?

Workplace incivility, bullying, and harassment is over experienced and under reported amongst LGBTQ+ employees. In order to tackle this issue, organisations can instigate a number of initiatives.

Topic	Level	Initiative
External facing LGBTQ+ inclusion promotion	Foundation	We have detailed information on our Australian LGBTQ+ inclusion focus or work on our external facing website.
External-facing social media communications	Advanced	Our external-facing organisational social media pages regularly show our LGBTQ+ inclusion work.
Promotion of services	Advanced	We promote our services directly to the LGBTQ+ community.
Visibility in service spaces	Advanced	We actively encourage the visible support of LGBTQ+ inclusion by providing options for client-facing staff to visually indicate that they are an ally or supporter of LGBTQ+ inclusion, and by displaying visible organisational support across client-facing spaces.
Internal senior leadership advocacy	Advanced	Our CEO or Senior Executives visibly show their support for LGBTQ+ inclusion internally.
External senior leadership advocacy	Advanced	Our CEO or Senior Executives visibly show their support for LGBTQ+ inclusion externally.

3. Intake and Assessment

Are our intake and other forms and documentation inclusive of LGBTQ+ people? Do we collect information on gender that is affirming for trans binary and non-binary people?

As heterosexuality, cisgender experiences and binary genders are the presumed norm, intake and other forms and documentation do not always allow a person to identify themselves or affirm their sexual or gender identity. Assumptions made thereafter can negatively impact the care delivered to that person.

Topic	Level	Initiative
Intake forms	Foundation	The language used within our intake forms/documentation is inclusive of LGBTQ+ people.
Non-binary options on forms	Foundation	We include non-binary options when collecting gender information within client-facing forms.

4. Confidentiality and Data Management

Do we have a privacy and confidentiality policy and staff guidelines, regarding the collection and management of LGBTQ+ sensitive data? Do we consider inclusivity of services beyond initial intake, service users' support teams and families, and do we consider people's rights in disclosing their identity throughout their journey?

LGBTQ+ people experience a high level of stigma and discrimination when accessing health services. It's common for LGBTQ+ people to be asked intrusive and inappropriate or irrelevant questions, and receive criticism or blame, based on the personal health information they share when accessing services. These negative experiences make LGBTQ+ people reluctant to talk about their health concerns – and, as a result, they may not get the best possible care for their health or situation. Staff should be informed on issues and reasons why LGBTQ+ service users may have concerns and hesitations around disclosure and privacy, and should understand what to do if someone discloses after intake.

Topic	Level	Initiative
Care planning and referral documents	Advanced	Our care planning / management and referral documents are inclusive of LGBTQ+ service users, their support team and families.
Privacy policy (or equivalent)	Advanced	We have a visible, documented privacy and confidentiality policy, with staff guidelines, regarding the collection and management of LGBTQ+ sensitive data.
Staff guidelines on disclosure	Advanced	We provide documented guidelines to staff regarding service users' rights to manage their disclosure throughout their journey, considering service user disclosure options, healthcare professional handover scenarios, and the service user's support team and families.

5. LGBTQ+ Consultation and Engagement

Do we consult with LGBTQ+ people about the design of our services? Do we allow LGBTQ+ people to provide feedback about their experiences accessing our services?

Planning, developing and improving LGBTQ+ inclusive health services requires input and feedback from those who the services are designed for. Like subject matter experts, LGBTQ+ service users can provide valuable advice to help ensure your health service is safe, friendly and welcoming for all patients, regardless of their sexual orientation or gender identity.

Topic	Level	Initiative
Feedback mechanism	Advanced	We provide LGBTQ+ service users with a feedback mechanism to comment on their experience within our organisation.
Service user consultation	Advanced	We provide an opportunity for our LGBTQ+ service users to consult with us regarding LGBTQ+ inclusive service provision.

6. Staff Development, Training and Resources

Do we have LGBTQ+ Awareness and Allyship training and resources available to all our employees? Have we actively encouraged all our employees to participate in training? Do we ensure we always have employees in critical functions who have the role-specific knowledge required to perform their roles inclusively? Do our front-line staff have specific knowledge about respectful and inclusive service provision for trans and gender diverse people?

Education is a vital component of an inclusive organisation. Employees may have little experience of LGBTQ+ people, who have traditionally been invisible in our services, and may not understand why inclusion is important, and what it looks like. Additionally, some roles within an organisation are particularly critical to the LGBTQ+ service user experience. It is important that people within these roles are equipped with role-specific LGBTQ+ inclusion training.

Topic	Level	Initiative
Access to resources	Foundation	All staff have access to resources that provide an understanding of the specific needs and health disparities of LGBTQ+ people within our sector/service.
Ally / champion reference guides	Foundation	All staff can easily locate ally/champion reference guides that detail how to be an effective ally and/or active champion for LGBTQ+ inclusion within the workplace.
LGBTQ+ training availability	Foundation	We have dedicated LGBTQ+ awareness, inclusion or allyship training, available to all employees, and promote it as widely as possible so as to maximise uptake.
Specific roles training	Advanced	We acknowledge that there are some roles within the organisation where it is essential that incumbents have a thorough understanding of the challenges that LGBTQ+ people face, so they are able minimise LGBTQ+ related challenges and roadblocks. We have ensured that people within these critical roles have been adequately skilled to provide an inclusive experience for LGBTQ+ service users. Those roles include client-facing providers or practitioners, client-facing admin and support staff, service managers and planners, and our organisation's leadership.
Trans and gender diverse resources	Advanced	We provide frontline staff with educational resources specifically regarding respectful and inclusive service provision for trans and gender diverse people.

7. Referrals and Stakeholder Engagement

Do we have a network of other health services, wellbeing providers, professional associations, or communities of practice on the topic of LGBTQ+ inclusive service provision? Can we refer our service users to LGBTQ+ inclusive services? Can we refer our service users to LGBTQ+ support services?

Health and wellbeing service providers often share communities of practice, reference groups and other initiatives which can be used to engage LGBTQ+ inclusion as a priority, stay current on the disparities and barriers LGBTQ+ people face, what programs and services are being offered in the community, and establish a referral network.

Topic	Level	Initiative
LGBTQ+ support services	Foundation	We can refer our service users to LGBTQ+ support services.
Engagement with other services	Advanced	We engage with other health services, wellbeing providers, professional associations, or communities of practice on the topic of LGBTQ+ inclusive service provision.
Referrals to LGBTQ+ inclusive services	Advanced	We can refer our service users to other service providers or practitioners who are clearly identified as LGBTQ+ inclusive.

8. Risk Mitigation and Management

Do we have formal risk mitigation and reporting processes to identify situations, and extract and report on incidents that could or have jeopardised the safety of LGBTQ+ service users?

Potential risks should be identified with a documented understanding of their effect on LGBTQ+ service users, and have clear mitigating actions to help prevent the risk from occurring. If an incident does occur organisations need to demonstrate culturally competent management of the incident. Organisations should collect data on LGBTQ+ related incidents, and report on them, to aid the management process.

Topic	Level	Initiative
Risk mitigation	Advanced	We have a formal risk mitigation process to identify situations that could jeopardise the safety of LGBTQ+ service users.
LGBTQ+ related incidents	Advanced	We have a formal process to address, extract and report on LGBTQ+ related incidents that could (or have) jeopardised the safety of LGBTQ+ people.

9. Continuous Improvement

Do we conduct needs analysis specific to our LGBTQ+ service users. Do we report on the continued improvement of our dedicated LGBTQ+ Strategy or Action Plan? Have we have implemented workforce inclusion initiatives to support LGBTQ+ staff? Are our gender-specific services, programs, or facilities inclusive of trans and gender diverse service users? Do we measure the knowledge and attitudes of our employees about LGBTQ+ service provision? Can we track this over time, and compare ourselves to other organisations in our sector?

Many organisations do some initial work to address the inclusion of their services, but don't consider how to embed this into their organisation as an ongoing consideration. Organisations should be implementing ongoing processes to continually review the changing needs of LGBTQ+ people, measure and track the capability and desire of their staff to deliver inclusive services, and report on this on an ongoing basis.

Topic	Level	Initiative
Needs analysis	Advanced	Our organisation has done a needs analysis regarding the specific needs of our LGBTQ+ service users.
LGBTQ+ inclusion report	Advanced	We report on the continued improvement of our dedicated LGBTQ+ Strategy or Action Plan.
LGBTQ+ staff inclusion	Advanced	We have implemented workforce inclusion initiatives to support LGBTQ+ staff.
'All-gender' inclusion	Advanced	Our gender-specific services, programs or facilities are inclusive of trans and gender diverse service users.
HWEI staff survey	Advanced	We regularly participate in the HWEI Staff Survey and use this data to measure and track the capability of our staff, and our performance vs other organisations in our sector.

3 Year Planning Cycle

It is unlikely that any organisation will be able to complete work in all these areas within a single year, particularly those just starting on their LGBTQ+ inclusion journey. We would recommend organisations map out a multi-year plan to cover all these areas. The HWEI criteria are updated every three years, to ensure they continue to reflect and drive leading practice, so consider working with a 3-year planning cycle, to ensure that the changing criteria are always reflected in your organisation's plans.

Once initiatives have been created and run once, it is equally important to consider how they are to be embedded within all parts of the organisation, so they become 'business as usual'. This means looking at how to build the criteria into organisational processes, reviewing the structure of your organisation to ensure that the different parts are implementing the initiatives and processes, etc.

While the criteria are classified as 'foundation' and 'advanced', you might decide that one particular 'advanced' area is particularly important for your organisation, and tackle it before some 'foundation' work. That is absolutely fine. The structure and criteria are to provide a guide, but they are intended to be broad enough to work for many different types of organisation.

We also acknowledge that all organisations are different. There will be differences in structure, culture, operating environment, etc., which means that other inclusion initiatives, not covered in the areas listed, may be necessary or beneficial. If organisations choose to have their work audited through the Submission process, additional work areas will be recognised.