



How to Get Involved As a Speaker, Facilitator or Trainer For Out & Equal

Table of Contents

Introduction	3
About Out & Equal Workplace Advocates	3
Our Vision	3
Our Mission	3
A Rich History	3
Governance of Out & Equal	4
What We Do	4
Out & Equal Discussions and Programs	5
About Out & Equal University and Building Bridges toward LGBT Diversity Programs	5
How You Can Get Involved as a Speaker, Facilitator, Trainer	6
Speaker's Bureau/Certified Facilitators	6
Certified Trainers	7
Notification of a Training Opportunity	8
Training Materials and Equipment	8
Compensation of Trainers	8
Appendix A: Speaker's Bureau, Certified Facilitators and Certified Trainers Quick Information Chart	9
Appendix B: Course Preparation Checklist	10
Appendix C: Certified Facilitator Quarterly Report Form	11

Introduction

About Out & Equal Workplace Advocates

Out & Equal is the preeminent national organization devoted to the improving the workplace for Lesbian, Gay, Bisexual and Transgender (LGBT) employees. Headquartered in San Francisco, Out & Equal strives to provide services and programs that promote diversity in the workplace.

Our Vision

Out & Equal's vision is workplace equality for all regardless of sexual orientation, gender identity, expression or characteristics.

Our Mission

Out & Equal educates and empowers corporations, organizations, HR professionals, employee resource groups (ERG's) and individual employees. Using professional, strengths-based programs and services, Out & Equal wants to create workplaces with equal policies, opportunities, practices, benefits, and climate regardless of sexual orientation, gender identity, expression or characteristics.

A Rich History

In 1998, three LGBT workplace organizations merged in an effort to effectively collaborate on their common mission of workplace equality. Named "The Pride Collaborative," this alliance included:

- Building Bridges, formed in 1990 to offer LGBT "sensitivity training" to United Way-funded agencies in the San Francisco Bay Area
- A Group of Groups (AGOG), formed in 1994 by employees from a dozen San Francisco Bay Area companies. This organization created opportunities for members of their respective LGBT employee associations and Employee Resource Groups (ERGs) to network
- Progress, formed in 1995 to provide leadership development resources including national leadership summits for ERG leaders

In 1999 The Pride Collaborative merged with:

- COLLEAGUES, a national volunteer organization that sponsored a yearly conference aimed at HR professionals and LGBT employees
- The new organization was names Out & Equal workplace Advocates
- This same year, *Progress Leadership Summit* and *COLLEAGUES Out & Equal Conference* combined resources to produce the annual *Out & Equal Workplace*

Summit. Each year, these conferences provide LGBT employees, management and Human Resources professionals an opportunity to network and learn

Governance of Out & Equal

Out & Equal is an independent 501(c)(3) nonprofit organization led by a governing board and staffed by a dedicated group of individuals. The board works closely with the executive director and the management team to provide governance and oversight of the organization. The board hires the executive director, raises funds and approves the budget. The executive director and staff conduct the day-to-day work of the organization. Currently, there are 17 staff and 3 interns working with corporations and organizations to create a fully inclusive workplace.

What We Do

Out & Equal is hard at work! Programs include:

- Annual *Out & Equal Workplace Summit*
- Training programs:
 - *Building Bridges Toward LGBT Diversity (for corporate, social services, government and fire/rescue sectors)*
 - *Out & Equal University* developing courses tailored for a broad range of training needs with our training partners (including PFLAG, TransEd, Common Ground and subject matter experts around the country)
 - *LGBT Diversity in the Workplace Lunch & Learn program*
 - *Town Call Webinar series*
 - *Trainer, Facilitator, Speaker Bureau Network*
- **NETWORKS!** professional communities:
 - *Regional Affiliates (12)* creating networks around geographical areas
 - *Employee Resource Group Registry* providing support to LGBT ERG's
 - *CollectiveX Professional Communities* is an online community for networking, discussions and information sharing
- *CareerLinks* is a collaborative effort with the National Gay & Lesbian Chamber of Commerce for LGBT job resources and career development.

Out & Equal Discussions and Programs

Out & Equal Speaker's Bureau

The Speaker's Bureau is a resource network for speakers who are knowledgeable about LGBT employees in the workplace. Whether as an ally or an LGBT employee, speakers can provide insights about workplace equality around the water cooler or presenting as part of speaker's panels. Speakers bring their expertise, provide facts to overturn myths and stereotypes and make a difference sharing your story and knowledge.

LGBT Diversity in the Workplace Lunch & Learn Program

Using 90-minute Lunch & Learn discussions, Facilitators provide an overview of the business case for the inclusion of LGBT employees in their own workplace. Out & Equal provides the slide deck materials that can be customized for your workplace. Facilitators address expanding the diversity in the workplace as well as reviewing LGBT related policies, benefits and workplace climate of their business or organization. Using skills to open discussion and providing facts, Facilitators assist fellow employees to assess the workplace environment and develop action plans to create equality in the workplace.

About Out & Equal University and Building Bridges toward LGBT Diversity Programs

Out & Equal University and Building Bridges Toward LGBT Diversity courses provide the keystone for education on the:

- Diversity of LGBT culture/terminology
- Business case for having fully engaged LGBT employees
- Assessment the current workplace climate
- Creation action plans to address desired changes

The course is designed to help employers get the most from LGBT employees and their co-workers by providing the tools to create a workplace that values diversity. This training fosters alliances between LGBT, straight employees and allies by providing opportunities to and in the workplace.

Trainers present these programs in coordination with Out & Equal Staff. Building Bridges Toward LGBT Diversity is traditionally presented as a 4-hour course or as an 8-hour train-the-trainer courses.

Additional Out & Equal University courses are currently in development for both classroom and online presentations which provide more opportunities for trainers to use their expertise.

How You Can Get Involved as a Speaker, Facilitator, Trainer

The Out & Equal programs offer several ways to get involved in the workplace equality movement. See Appendix A for a quick information table on the certification process.

The *Speaker's Bureau* is an easy way for individuals to gain a deeper understanding of the concepts and facts regarding LGBT employees. Speakers gain skill and confidence by having workplace conversations or presenting as part of a panel. Using Out & Equal reference materials, Speakers can be a resource to provide information to interested employees in the workplace. Speakers can also lead presentations on topics in which they have expertise as part of the Out & Equal Trainer's Network.

For those who want to more actively influence their own workplace, the *LGBT Diversity in the Workplace Lunch & Learn* program provides a foundation to share facts and open discussions with other employees. Certified Facilitators schedule and facilitate workplace discussions using Out & Equal materials regarding the business case for diversity in the workplace and cover:

- current policies
- benefit programs
- evaluating workplace climate
- developing action plans for change in the workplace
- creating a workplace where all employees are fully engaged and productive.

Facilitators work with individual LGBT and ally employees, LGBT Employee Resource Groups (ERGs), Human Resources professional and with management to create a dialogue about creating the best practices for their workplaces.

Speaker's Bureau/Certified Facilitators

The purpose of the Speaker's Bureau enables speakers to have the resources and knowledge to answer questions and open conversations about LGBT issues in the workplace for their company, organization or local community.

Individuals take the Out & Equal Train-the-Trainers course have a strong foundation in the concepts and telling their own personal stories to others in the workplace. Speaker's Bureau members can also facilitate *LGBT Diversity in the Workplace Lunch & Learn* discussion using Out & Equal materials. Speaker's with additional areas of expertise, can work with Out & Equal to set up speaker's panels and other presentations.

To be an Out & Equal speaker or facilitator:

- Attend the 8-hour Out & Equal Train-the-Trainer course (if you have training experience, contact Pat Baillie, Out & Equal Training Manager at pbaille@outandequal.org or 415-694-6521)
- Receive a certificate of completion
- Sign Statement of Agreement to be certified for 2 years as an Out & Equal Certified Facilitator or Speaker Bureau member
- (optional) Attend the full Building Bridges toward LGBT Diversity course

Speakers or Facilitators upon certification will:

- Be invited to join the Out & Equal CollectiveX Trainer's Network
- Be able to download from the Trainer's Network the current version of the 90-minute *LGBT Diversity in the Workplace Lunch & Learn* materials.
- Have access to the reporting and feedback forms to use after Lunch & Learn sessions (due March 31, June 30, September 30 and December 30)

Speaker's Bureau/Certified Facilitators members are not paid by Out & Equal to facilitate these discussions. Certification is good for two years at which time speakers and facilitators can re-take the Train-the-Trainer course for an additional 2 year certification.

The Out & Equal Agreement materials are the property of Out & Equal and cannot be shared, released or sold by the Speaker/Facilitator without prior coordination with Out & Equal.

Certified Trainers

The purpose of the Trainer certification program is to develop a cadre of individuals who can present both Out & Equal University courses and the Building Bridges toward LGBT Diversity Training program.

To be an Out & Equal Certified Trainer:

- Attend the 8-hour Out & Equal Train-the-Trainer course (if you have training experience, contact Pat Baillie, Out & Equal Training Manager at pbaillie@outandequal.org or 415-694-6521)
- Receive a certificate of completion for the training.
- Sign Statement of Agreement to be certified for 2 years as an Out & Equal Certified Facilitator or Speaker Bureau member.
- Attend a Building Bridges toward LGBT Diversity course
- If selected, assist in presenting a Building Bridges course as a third instructor
- If selected, co-present a Building Bridge course with Out & Equal staff
- Certified as an Out & Equal Trainer

Trainers are also certified as speakers or facilitators. Upon certification, they will:

- Be invited to join the Out & Equal CollectiveX Trainer's Network
- Be able to download from the Trainer's Network the current version of the 90-minute *LGBT Diversity in the Workplace Lunch & Learn* materials.
- Be able to download from the Trainer's Network the current versions of the *Building Bridges Toward LGBT Diversity* materials.
- Have access to the reporting and feedback forms to use after Lunch & Learn sessions (due March 31, June 30, September 30 and December 30)

All *Building Bridges toward LGBT Diversity* programs are delivered by two co-presenters. Certified Trainers normally deliver the training with an Out & Equal staff member or another Out & Equal Certified Trainer. Certified Trainers may also be selected to train others through the Train-the-Trainer program. Other Out & Equal University courses, both presented in the classroom and online, are also presented by Certified Trainers.

Certified Trainers are eligible to receive a stipend, plus coverage of travel expenses, when they are presenting Out & Equal University courses. Out & Equal will schedule all training courses. Trainers may be asked to co-present at variety of businesses and locations. Certification is good for two years at which time trainers can re-take the Train-the-Trainer course for an additional 2 year certification.

Notification of a Training Opportunity

When a request for training course, outside your workplace, that request is forwarded to Out & Equal. When a training agreement has been reached, Out & Equal staff will contact the certified trainers for their availability. Scheduling is flexible and there are no guarantees on the frequency of course opportunities for the certified trainers.

Training Materials and Equipment

Speakers, Facilitators, and Trainers will use CollectiveX to get the most current training materials. See Appendix B, Course Preparation Checklist, on how to schedule and prepare for a presentation. Facilitators and Trainers should:

- Have a laptop that has PowerPoint software installed for the course
- Make copies of handouts and feedback forms as needed for the courses

For Building Bridges courses where Out & Equal staff is not available, the Certified Trainer will send the class list and evaluations to Out & Equal within 5 days after the class. Facilitators will send quarterly reports on *LGBT Diversity in the Workplace Lunch & Learn* discussions (Appendix C). All materials, whether in print or electronic form are the property of Out & Equal, and may not be used for any purpose other than an Out & Equal training program.

Compensation of Trainers

Some Certified Trainers prefer to volunteer their services, while others accept a stipend. The following is the rate schedule for teaching Building Bridges and classroom presentations for Out & Equal University courses. (NOTE: When payments reach or exceed \$600 in any calendar year, that income is reported to the Internal Revenue Service and to the trainer)

	Compensation	Travel Expenses
Train-the Trainer Course	None	None
<i>Local training (or additional courses taught out of town):</i> 4-hour training within 75 miles 8-hour training within 75 miles	Stipend of \$150 Stipend of \$400	Up to \$100 in travel (gas, parking etc – receipts required)
<i>Out-of-town training:</i> 4-hour training 8-hour training	Stipend of \$800 Stipend of \$1000	Reimbursement for travel expenses – receipts required – additional classes in the same location are paid at the local training rate.

Appendix A: Speaker's Bureau, Certified Facilitators and Certified Trainers Quick Information Chart

	Speakers/Facilitators	Certified Trainers
Steps to become	<ul style="list-style-type: none"> Attend Train-the-Trainer course Optional: Attend Building Bridges 	<ul style="list-style-type: none"> Attend Train-the-Trainer course Attend full Building Bridges Co-lead Building Bridges Receive and incorporate feedback Optional: co-lead again Receive certification
Requests	<ul style="list-style-type: none"> Seeks out requests for delivering Lunch-n-Learn presentations Requests for Out & Equal University/Building Bridges course are forwarded to Out & Equal Training 	<ul style="list-style-type: none"> Seeks out requests for delivering Lunch-n-Learn presentations Seeks out requests for delivering Building Bridges/O&E University classes Out & Equal also fields requests for Building Bridges, and may call upon Certified Trainer to co-lead. Requests for Out & Equal University/Building Bridges course are forwarded to Out & Equal Training
Scheduling	Sets up schedule for <i>Lunch-n-Learn</i> presentations	<ul style="list-style-type: none"> Out & Equal staff schedules all O&E University and Building Bridges training Building Bridges requires two Certified Trainers
Lunch-n-Learn	<ul style="list-style-type: none"> Free to attend Takes place only within the Speaker's/Facilitators own company or organization. 	Certified Trainers are able to present <i>Lunch-n-Learn</i> discussions (see details under Speakers/Facilitators)
Building Bridges	Cannot deliver the Building Bridges programs.	Certified Trainers are eligible to deliver the Building Bridges
Materials & equipment	Able to download from the CollectiveX Trainer's Network: <ul style="list-style-type: none"> the most current version of <i>Lunch & Learn</i> materials Lunch & Learn Handouts Feedback forms for attendees Quarterly report forms 	<ul style="list-style-type: none"> See <i>Lunch-n-Learn</i> material list For O&E University and Building Bridges courses: <ul style="list-style-type: none"> Most current version of course materials Out & Equal evaluation forms
Compensation	None	<ul style="list-style-type: none"> Certified Trainers receive stipend by Out & Equal and are reimbursed for out-of-town travel expenses (receipts required) Donations in lieu of stipend are tax-deductible. Paid within 30 days of training.
Reporting	Quarterly reports on date of training, number attending and copy of evaluation forms (Mar, Jun, Sep, Dec)	<ul style="list-style-type: none"> Facilitator requirements for Lunch & Learn discussion For other courses, class list and copy of evaluations sent within 5 days of class to Out & Equal.

Appendix B: Course Preparation Checklist



Facilitator Name/s: _____

Date of Lunch & Learn: _____

Resources (what's needed for the class): (handouts, other details needed for the course)

Length of Lunch & Learn: 1 hour

Prep Time: 30 minutes to set up room

Facilitator Responsibilities:

Prior to day of class:

- Schedule course (use company scheduling system if available)
- Reserve room
- Schedule audiovisual equipment (projector, flip chart, white board, pens)
- Check that laptop is available for course and has PowerPoint program on it
- Download most current version of training materials (Out & Equal CollectiveX Trainer's Network)
- Review materials
- Make copies of handouts, feedback forms and other materials
- If more than one facilitator, meet with co-facilitator to prepare for course
- Have a sign in sheet for the course

Day of class

- Ensure the room is set up and ready 30 minutes before class
- Have all materials for the Lunch & Learn (Handouts, notes etc)
- Review room logistics (room temperature, emergency exits and restrooms)
- Conduct course
- Have participants complete feedback forms and collect
- Clean up room and gather extra materials
- Complete any in-house reporting requirements for the course

After the class

- If there is a second instructor, debrief from class
- Trainers: send class list and evaluations to Out & Equal within 5 days
- Facilitators: Complete Out & Equal Quarterly report form
- Notify Out & Equal of any errors, changes to presentation materials

Appendix C: Certified Facilitators Quarterly Report



Report Date:

March 31, 20__

September 31, 20__

June 30, 20__

December 31, 20__

Even if you have not conducted any Lunch & Learn session, send this electronically or by mail to pbaillie@outandequal.org by the above dates and indicate NONE on the form.

Please send the Lunch & Learn evaluation forms to Out & Equal (you can scan them in and send them to pbaillie@outandequal.org if that is easier) or mail them to:

Pat Baillie, Training Manager
 155 Sansome St, Suite 450
 San Francisco, CA 94104

If you have any question, call Pat at 415-694-6521

Certified Facilitator Name:	Email address:	Phone Number:
Dates of Lunch & Learn:	Number Attending:	Location:
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		