



2009
Out & Equal
Workplace Summit

**Everyone Counts:
Voluntary Self-Identification Project Update**
October 9, 2009

Panelists:
Pat Baillie, Ralph Carter, Chris Crespo, Terry Hildebrandt,
Samir Luther, Howard Solomon
Elena Baca (moderator)


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**Moderator Opening Remarks
and Panel Introduction**


Elena Baca (moderator)

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Objectives of Workshop

- Background information on Self-ID project
- Current status and research using LGBT data
- Evaluate Best Practices
- Recommendations for further development



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Introductions


- Pat Baillie, Out & Equal Workplace Advocates
- Ralph Carter, Xerox
- Chris Crespo, Ernst & Young LLP
- Terry Hildebrandt, Terry Hildebrandt & Associates
- Samir Luther, Human Rights Campaign
- Howard Solomon, Sun Microsystems, Inc.





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**Introduction to the
Community of Practice and its History**



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Background - Scope


- Establish diversity benchmarks
 - Recruiting, retention, promotion
- Data collection includes L, G, B & T
- Multinational Solution
- All industries, organizations



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Background - History


- Precedence - HR Systems – tracking other demographics in employee record (race, sex)
- Global variations in tracking (US vs. UK)
- Previous US LGBT tracking efforts
 - Informal estimates using ERG memberships
 - Enrollment in Domestic Partner programs
 - Survey – 2003 in anonymous employee engagement surveys
- Resistance – privacy issues and protections



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Community of Practice Process


- Self-ID Community of Practice Committees
 - Legal Issues
 - HR Systems
 - Data Utilization
 - Survey Committee



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Best Practices – Legal Issues

- Actions if data demonstrates that the employer is broadly discriminating against LGBT employees
- Discussion about retaliation, discrimination, and harassment if LGBT employees answer questions honestly
- How to address employees' fears of retaliation, discrimination, and harassment
- Maintaining the privacy of the data
- Legally identifying employees to take climate surveys



Best Practices – HR Systems

- Developing a Self-ID program
- Privacy requirements best practices
- Technology system requirements
- Ask current employees or just new employees
- How to ask the questions about LGBT
- Getting people to trust and answer question
- Looking at US versus global issues

Best Practices – Data Utilization

- Create a summary of data collected from participating companies
- Identify current companies collecting data
- Develop interview survey to gather data
- Interview and consolidate data gathered
- Provide examples of best practices by participating companies

Best Practices – Survey Committee

- Create sample survey items for use in best practices
- Identified data to be collected (16 items)
- Receive and record survey responses
- Summarize findings

Summary of Reporting Companies

- Small sample
- Sharing process, not data collected
- Two major processes
 - Anonymous employee engagement survey
 - Confidential Employee Records
- Initial years yield low results
- "Opting out" option

Impact of Self-Identification

Would they tell if we asked?

100% YES
100% NO
100% DON'T KNOW/REFUSE

Degrees of Equality Report, 2009

Why not come "out"?

Degrees of Equality Report, 2009

Looking deeper into workplace climate

Degrees of Equality Report, 2009

What impact do allies have?

Degrees of Equality Report, 2009

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Discussion

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Brainstorming Session

- Break into panelist-led subgroups
- No preconceived notions – learning from each other
- Primary goals:
 - Continue raising awareness
 - Add to best practices
- 20 minute discussion groups to develop:
 - Major questions/concerns
 - Possible solutions
- Report Out by panelists

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Discussion Topics

1. Where do I begin?
2. Wording for questions on sexual orientation & gender identity
3. Adding LGBT Self-ID to your employee satisfaction survey
4. Adding LGBT tracking to your HR employee databases
5. Going international/global with LGBT Self-ID
6. Using the LGBT Self-ID data

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Reporting Out

- Questions
- Concerns
- Suggestions
- Parking lot

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Views from the Field

- Internal Organizing
- Benchmarking Call
- Follow Up

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Bring it Home

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Bringing it Home

- Key messages heard
- Poll
- Next steps
 - Take home
 - For community of Practice
- Getting involved

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Resources

- Where are our LGBT Employees? Voluntary LGBT Self ID Best Practices - <http://outandequal.org/documents/LGBTSelfIdentificationReport.pdf>
- 2010 Corporate Equality Index – company ratings - <http://www.hrc.org/cei>
- Degrees of Equality Report – workplace climate findings - <http://www.hrc.org/degreesofequality>
- Williams Institute – research on LGBT issues - <http://www.law.ucla.edu/williamsinstitute/home.html>
- Transgender Equality and the Federal Government - http://www.transquality.org/Resources/NCTE_Federal_Government_web.pdf
- Wilcock-Combs Communication/Harris Interactive – market and LGBT research - http://wilcockcombs.com/research_insights/harris_interactive.html

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Final Thoughts

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