

# Welcome to Out & Equal's June Town Call

Be sure to dial into the  
audio portion of the conference

1-866-740-1260 (U.S. & Canada)

Participant Access code: 6946500

Your line will be muted



# Where are our *LGBT* employees?

*Using self-identification to track gender identity and sexual orientation in the workplace!*



Workplace  
Advocates

**Sponsored by:**



**Presenters:**

**Howard Solomon, Terry Hildebrandt,  
Ralph Carter, Samir Luther, Pat Baillie**

# A word from our sponsor...



Representing PG&E: Tita Gray  
Principal Manager of Diversity & Inclusion



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# Announcements



! Out & Equal Training Programs

! 2009 Out & Equal Workplace Summit

October 6th thru 9th at Disney's Coronado Springs in Florida

Early registration open until July 30, 2009!



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# History & Rationale



**Howard Solomon**

Regional Alliance Manager, US Software Practice at Sun  
Microsystems, Inc & chair of the Self-ID Community of Practice



# Historical Perspective

- ! First approached Sun 4/06
- ! Engaged key participants at O&E 9/06
- ! First formal session at O&E 9/07
- ! Formed steering committee in 2008
  - Ralph Carter – Xerox
  - Terry Hildebrandt – independent
  - Chris Crespo – Ernst and Young
  - Alan Gardner – ING
  - Samir Luther – HRC
  - Pat Baille – Out and Equal



# Current Status

- ! History of tracking minorities
  - ! Protected classes data utilization
  - ! Business Case for tracking
- ! Legal situation
  - ! US vs. UK
- ! Who is doing what today?
  - ! LGBT Surveying
  - ! LGBT Tracking
  - ! The need for this report



# The Project Goal

! Goal: Identify best practices for Voluntary LGBT Self-Identification

! Criteria

- ! Includes L, G, B & T
- ! Multinational Solution
- ! Scalable
- ! All industries & organizations
- ! Practices acceptable to Legal & HR
- ! Develop discussion among sectors



# Community of Practice

- ! We are a Community of Practice
- ! Over 40 companies
- ! People from the US and Canada
- ! Profit and Non-profit
- ! Key workplace advocacy partners including:
  - ! Out and Equal Workplace Advocates
  - ! Human Rights Campaign



# Methodology



**Terry Hildebrandt**

Executive Coach at Terry Hildebrandt and Associates LLC



# Methodology Overview



- ! Survey
- ! Form Committees
- ! Interview Corporations
- ! Develop Best Practices
- ! Summary report for community use



# Survey



- ! March 2008, Out & Equal ERG Survey:
  - ! 91 of the 107 uses terms related to sexual orientation and gender
  - ! 96 of the 107 conducts a staff survey
  - ! 23 of the 107 specifically asks its employees to identify or state their sexual orientation

# Committees



- ! Formed steering committee 2/2008
  - ! Current Practices, chaired by Alan Gardner of ING North America;
  - ! HR Systems, chaired by Chris Crespo of Ernst & Young LLP;
  - ! Data Utilization, chaired by Howard Solomon of Sun Microsystems Inc.;
  - ! Legal Issues, chaired by Terry Hildebrandt of Terry Hildebrandt and Associates LLC
  - ! Report Integration, chaired by Ralph Carter of Xerox Corp.

# Interviewing



- ! Select companies interviewed
  - ! Corning, Hewitt, Sun Microsystems, Ernst & Young, JPMorganChase, Bank of America, Merrill-Lynch, IBM
- ! Reported on current practices

# Compile Results – Who is doing what



- ! Standalone LGBT Survey
  - ! Hewitt, E&Y
- ! Climate Survey included in demographics:
  - ! Bank of America, Sun, JPMChase, Corning
- ! HR Systems
  - ! Merrill-Lynch, IBM



# Report Overview



**Ralph Carter**

Senior Analyst WHESC Customer Satisfaction & Quality  
Xerox Corp.



# Why Get Involved?



- ! Xerox mission since 1906
- ! Xerox recognized for its LGBT diversity
- ! Galaxe Pride at Work Employee Resource Group 20th anniversary
- ! What led us to engage LGBT Self-ID Community of Practice
- ! How Xerox can use the report



# Other Companies....

## ! Broad engagement in Community of Practice

AARP Magazine  
Academy of Human Resource Development  
Alcatel-Lucent  
Alcoa  
American Airlines  
American Express  
Aon  
Bank of America  
Birch & Company  
Boeing  
Campbell Soup Company  
Cargill  
Carnegie Mellon University  
Chevron  
Chubb  
CIBC  
Cisco  
Citi  
Corning Inc  
Credit-Suisse  
Cummins Inc  
Daon  
Dell  
Deloitte Consulting LLP

Dow Chemical  
Eli Lilly and Company  
Empire State Pride Agenda  
Ernst & Young  
Fedex  
Freddie Mac  
Freescale  
Gap  
Genentech  
Goldman Sachs  
Hewitt Associates  
Hewlett Packard  
Honeywell  
Human Rights Campaign  
IBM  
ING  
Intel  
ITT Space Systems Division  
Johnson and Johnson  
JPMorgan Chase  
Kimpton Hotels / Restaurants  
KPMG  
Lambda Legal  
Mercer

Merck  
Merrill Lynch  
MetLife  
Morgan Stanley  
Oliver Wyman  
OmniStudio  
Out & Equal  
Portland General Electric  
PWC  
Raytheon  
Schwab  
Sun Inc  
Sun Life  
Target  
Transgender Law Center  
Turner Broadcasting System Inc  
U of Mass  
Veterans Affairs Medical Center  
Wal-Mart  
Wellpoint  
Wolfblock LLP  
Xerox



# Best Practice Summary

## ! Understand business gaps and problems to solve

“Allowing LGBT employees to self-identify... enabled the firm to better understand and respond to the needs... relating to satisfaction with the organization, retention, growth opportunities [and] inclusion.” JPMorgan Chase



## ! Know your company's cultural and LGBT competency

- ! Longevity of policies and employee awareness of them
- ! Senior executives freely talk about gender identity and sexual orientation
- ! Willingness to “walk the talk”

# Best Practice Summary

## ! Decide approach(es) for data collection

- ! Anonymous Engagement Surveys
- ! Confidential Employee Records

## ! Leverage existing processes

- ! Assure data integrity, confidentiality, anonymity
  - ! Third party providers, limited drill-down, Safe Harbor review for security of sensitive employee information
- ! Utilize existing Human Resource Information Systems and opt-in approaches. Make it routine.



# Best Practice Summary

- ! Fully explore and resolve any legal concerns
  - ! See Report Appendix: Risk/Benefit Analysis
  - ! No employers surveyed encountered insurmountable legal concerns, as long as processes voluntary and data properly safeguarded.
  
- ! Develop comprehensive communications plan
  - ! Use in diversity context and business mission
  - ! Why data is being collected
  - ! Where data will be stored
  - ! Who will have access to the data
  - ! How information will be used and reported



# Best Practice Summary

- ! Clearly communicate intended uses of information
- ! Utilize for same purposes as for visible minorities
  - ! Hiring, retention, involuntary separation
  - ! Pipeline and succession planning
  - ! Role models for mentoring and employee development
  - ! Enhancing non-visible minorities in processes like recruiting
- ! See big picture, but start small



# Best Practices



**Samir Luther**

**Senior Manager Workplace Project**

**Human Rights Campaign (HRC) Foundation**

# Implementing SelfID



- ! Explore existing LGBT data
- ! Clarify goals, including data needs and intended use
- ! Communicate thoughtfully and consistently to everyone, engage your LGBT leaders and champions
- ! Roll-out engagement surveys/employee demographic questionnaires
- ! Evaluate results and adjust process accordingly
  - ! Follow-through – long term commitment



# Case Study #1: Anonymous Survey

## Corning Inc.

! Each of us is unique. With this in mind, please indicate below how you would describe your own uniqueness. Your answers are voluntary, confidential and will be used only to better understand patterns of diversity across the Technology Community. (Select all that apply)

- ! ....
- ! Lesbian, gay or bisexual
- ! Transgender
- ! ....



# Case Study #2: Employee Records Merrill Lynch & Co.



- ! Merrill Lynch & Co. recognizes the sensitivity of this information and takes every precaution to protect its confidentiality. Thus, this information will only be used for governmental and internal diversity reporting and other legitimate business purposes. Merrill is required by U.S. federal regulations to maintain, track and report information only on the race or ethnicity and gender of the U.S. workforce. The information that you furnish will not be used as the basis for any employment action, and it will not subject you to any adverse treatment.



# Corporate Equality Index



- ! Criteria 3.0, effective calendar year 2011
- ! **Confidential** and **optional** identification questions about gender identity and sexual orientation included in at least one of the following
  - ! Anonymous employee engagement or climate surveys
  - ! Employee records
- ! [www.hrc.org/newCEI](http://www.hrc.org/newCEI)



# *Future Use & Implementation*



**Pat Baillie**

**Associate Director of Training**

**Out & Equal Workplace Advocates**

# Challenges



- ! Inclusive/Diverse Language
- ! Sample size
- ! Coming out based on company climate
- ! Multinational impacts on laws
- ! Utilizing the data to support expansion of LGBT inclusion in the workplace

# Expanding Use/Application

- ! Assisting other companies to use SelfID
- ! Developing a database for trend analysis
- ! Incorporating sector best practices
- ! Beyond corporate focus
- ! International coordination and sharing
- ! Training needs analysis



# What's next...



- ! Present SelfID updates at O&E Summit 2009
- ! Advanced panel discussion on HR Information system use with LGBT data
- ! Updated report to be issued in late 2009
- ! Correlating data to other metrics such as climate surveys

# Questions & Answers

## *How to ask a question...*

- ! Online - use chat mode anytime during webinar
- ! Teleconference - dial \*7 and ask your question & then \*6 to return your phone to mute



# Closing Comments



**Presenters:**

**Howard Solomon, Terry Hildebrandt,  
Ralph Carter, Samir Luther, Pat Baillie**

# Thank you for your participation!

***Please complete the short survey at the end of the call!***

***Consider a donation to Out & Equal:***

***<http://www.outandequal.org/about/Donations.asp>***

***Next Town Call:***

***Thursday, July 30 on***

***Employee Resource Groups in the Workplace***



More questions?

Contact Pat Baillie, Associate Director of Training  
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