

Welcome to Out & Equal 2011 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

Welcome! Your line will be muted and this session
will be recorded for our archives!



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June Town Call

Making Self-ID a Reality



Presenters:

Pat Baillie, Associate Director of Training, Out & Equal

Terry Hildebrandt, Executive Coach & Organization Development Consultant

Moderator: Q Wilson, Senior Program Associate



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Announcements



- **July 5 & 12 (11:30am PDT)** – Out & Equal University - Targeted AND Privileged: The Importance of Examining Whiteness within the LGBT Community presented by Stephanie Puentes & Laurie Lippin
- **July 26** – Empowering Allies Tour with David Hall (Houston RA)
- **July 28** – Empowering Allies Tour with David Hall (Chicagoland RA)
- **August 25** – Empowering Allies Tour with David Hall (LA RA)
- **September 7 & 14 (1:00pm PDT)** – Out & Equal University - Taking Lesbian, Gay, Bisexual and Transgender equality from Theory to Reality: Insights from Brian McNaught on where we came from, where we are today and where do we need to go to advance our global human rights movement
- **Oct 25-28** – Annual Workplace Summit, Dallas (Registration & hotel booking now open!)
- Check www.outandequal.org for more info on:
 - Upcoming & Archive Training - <http://www.outandequal.org/training-programs>
 - Regional Affiliates - <http://www.outandequal.org/regional-affiliates>
 - Employee Resource Groups - <http://www.outandequal.org/resources/groups>
 - CareerLink - <http://lgbtcareerlink.com/>
 - Summit 2011 - <http://outandequal.org/summit-2011>



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2011 Sponsor Deadline Approaching

- Corporate and small business sponsorship still available
- Also ad space, exhibit hall booth space and gift bag insertions available.
- All donations used directly to help advance Out & Equal's education outreach programs
- Deadline has been extended to August 1st
- Contact our Director of Development, Sherrie Holmes. At sholmes@outandequal.org or (415) 694-6508
- Current list of sponsors is at <http://outandequal.org/2011-sponsors>

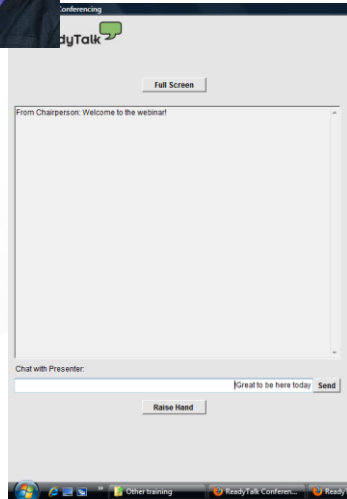


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ReadyTalk Features



- ⦿ Phone lines are muted
- ⦿ Ask questions by using the chat feature
- ⦿ Chat is seen by the all the presenters
- ⦿ Technical problems, raise your hand and check the chat box!
- ⦿ Cut & Paste links from chat
- ⦿ Polling – select an answer, submit and see results

June Town Call



Making Self-ID a Reality



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Why Collect Demographics?

Lord Kelvin, 1883:

"When you can measure what you are speaking about, and express it in numbers, you know something about it; but when you cannot measure it, when you cannot express it in numbers, your knowledge is of a meager and unsatisfactory kind."



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7

Historical Perspective

Demographic (1)	US Population (2)	1988	2008	2018
Age: 55+	23.4%	12.4%	18.1%	23.9%
Sex: Women	50.7%	45.0%	46.5%	46.9%
Race: Black	12.4%	10.9%	11.5%	12.1%
Ethnicity: Hispanic	15.1%	7.4%	14.3%	17.6%

- What do companies want to know to stay competitive?
 - How many women C-Suite execs in your company?
 - How many people of color left the company in the last year?
 - How many LGBT employees do you have?

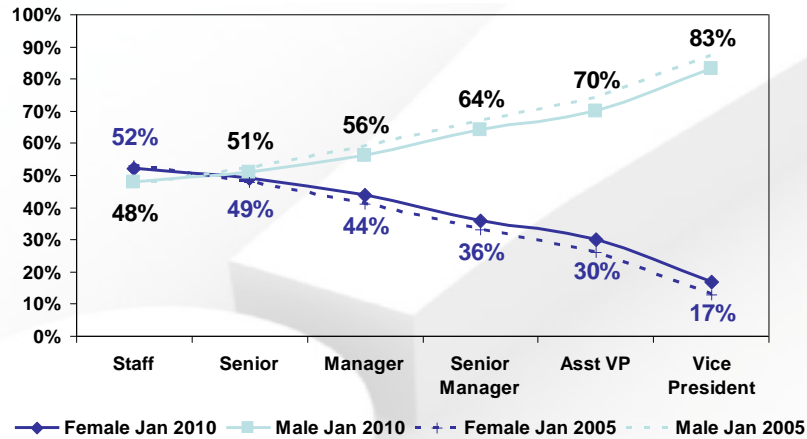
1. Employment Projections Program, U.S. Department of Labor, U.S. Bureau of Labor Statistics, http://www.bls.gov/emp/ep_table_301.htm
 2. US Census Data (2009) - <http://factfinder.census.gov/servlet/ACSSAFFPeople>



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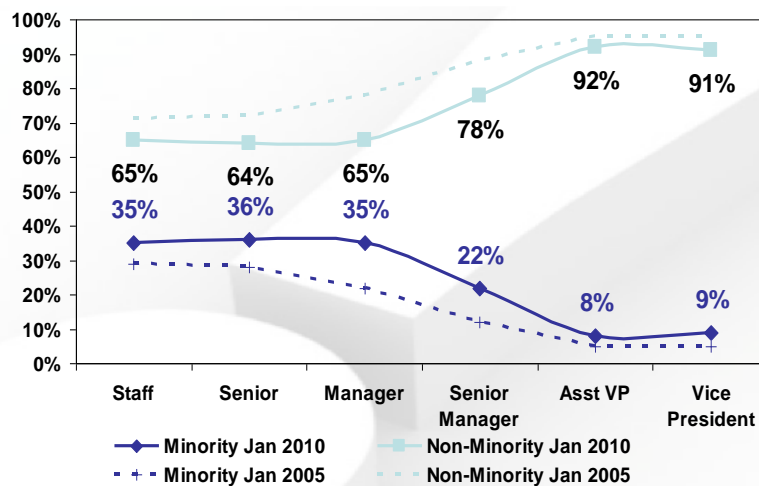
8

Closing the traditional male/female gap



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Closing the ethnic minority gap



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LGBT Voluntary Self-ID Perspectives

The purpose of affirmative action is to give our nation a way to finally address the systemic exclusion of individuals of talent on the basis of their gender or race from opportunities to develop, perform, achieve and contribute.

President Clinton, July 19, 1995

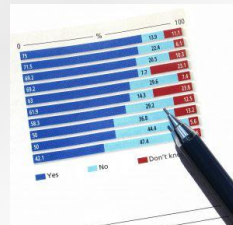


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What is it?

- Identify LGBT employees using:
 - company-wide satisfaction surveys
 - Human Resources systems
- Similar to collecting other demographic information (some required by law)
 - Gender
 - Ethnicity
 - Veteran status



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12

Willingness to Self-Identify as LGBT

72% YES
 18% NO
 10% DON'T KNOW/REFUSE



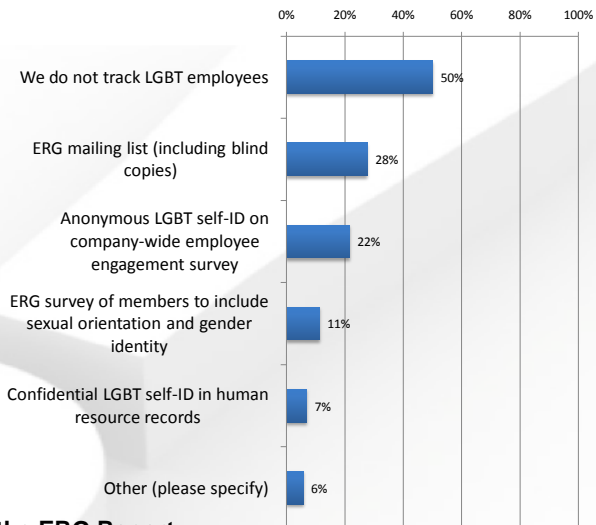
Degrees of Equality Report, 2009

Who's doing what?

28% allow for self-ID through anonymous corporate surveys or confidential HR records

One other method of tracking is through domestic partner benefits utilization

How does your ERG and/or company track the number of LGBT employees? (Check all that apply.)



Out & Equal 2010 State of the ERG Report

Survey Approach

- **Anonymous engagement surveys.**
 - Existing organizational climate surveys
 - Typically anonymous
 - Include optional demographic questions on gender identity and sexual orientation
 - Reported through aggregated data broken down by business unit or function



http://www.hrc.org/documents/LGBT_Self-IdentificationReport_-_2009-05-08.pdf

Sample Questions



- **General**
 - Do you identify as lesbian, gay, bisexual or transgender? (Yes/No)
- **Sexual Orientation**
 - What is your sexual orientation? (Bisexual, Gay man, Gay woman/lesbian, Heterosexual/straight, Other _____, Prefer not to say)
- **Gender Identity**
 - Is your gender identity the same as when you were born? (Yes/No)
- **Who else (building allies)?**
 - Do you know someone in the company who is LGBT?
 - Do you know someone who is “out” in the company as LGBT?
 - Do you consider yourself an (heterosexual) ally to the LGBT community?

http://www.hrc.org/documents/LGBT_Self-IdentificationReport_-_2009-05-08.pdf

HR Records Approach

- Confidential employee records.
 - Existing human resource information systems (HRIS)
 - Ask employees to optionally provide demographic data
 - Can include questions relating to gender identity and sexual orientation
 - Access to this data must be restricted to specified personnel
 - For defined workforce management and development purposes



http://www.hrc.org/documents/LGBT_Self-IdentificationReport_-_2009-05-08.pdf

Why do this?

- What should we do?
- Commitment of the employees?
- Commitment of the organization?

- Signal of inclusion
- Evaluating the success of LGBT-inclusive practices
 - Recruitment
 - Retention
 - Productivity
- Support research about the LGBT community
- Provides metrics to make changes in the workplace
 - Increase engagement
 - Reduce attrition
 - Identify changes to policies and benefits for LGBT employees
 - Improve climate for LGBT employees

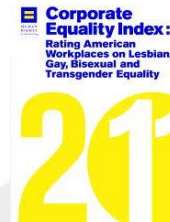
Who is doing Self ID?

- HR Systems
 - Bank of America, originally via Merrill Lynch
 - Booz Allen Hamilton
 - Ernst & Young (Canada and UK)
 - IBM
 - KPMG (Canada and possibly US)
 - Marsh & McLennan Companies
 - PricewaterhouseCoopers
 - Xerox Canada launching June 2011
- Survey data – many companies have been doing this for years and it is now included as criteria on the Corporate Equality Index (CEI) in 2012



What does the CEI look for?

- Voluntary opportunities for employees to identify as lesbian, gay, bisexual and transgender in anonymous and/ or confidential surveys.
- Parity in at least one of the demographic data collection mechanisms of employers.



What does the CEI NOT ask for?

- Quotas on LGBT employees hired or positions held (e.g. senior leaders)
- Reporting to HRC on the number of LGBT employees in your business.
- Separate surveys for LGBT employees.

http://www.hrc.org/issues/cei_criteria_new.html

Resources for Self ID Starting Out

- **Degrees of Equality Report** – captures data on climate the impact of policies - www.degreesofequality.org
- **LGBT Community of Practice** – <https://lgbtselfid.groupsite.com/main/summary>
- **Where are our LGBT Employees? LGBT Voluntary Self ID Community of Practice** - http://www.hrc.org/documents/LGBT_Self-Identification_Report_-_2009-05-08.pdf
- **HRC CEI Criteria 3.0 – Self ID included under Organizational Competency** - http://www.hrc.org/issues/cei_criteria_new.html
- **Out & Equal 2010 State of ERG Report** - http://www.outandequal.org/documents/2010_ERG_report.pdf

Case Studies: LGBT Voluntary Self-ID From Theory to Reality



The makeup of today's workforce is becoming more diverse as a result of demographic changes. Since this makeup is continuously being altered, it is necessary for the individuals responsible for implementing and leading diversity-related initiatives to constantly monitor trends and themes relating to diversity.

SHRM 2006 Workplace Diversity and Changes to the EEO-1 Process Survey Report

Steps to LGBT Self ID

- Considerations
 - **Business Rationale for Self ID**
 - Approaches
 - Insights & Barriers
 - What to do with results

http://www.hrc.org/documents/LGBT_Self-IdentificationReport_-_2009-05-08.pdf

Dells' Rationale

- Dell is considering creating a voluntary self-identification program... which will allow:
 - Calculation of accurate business metrics on the recruitment, retention and development of LBGT employees
 - Leveraging of LGBT leadership for recruitment, development, and retention activities
 - Identification of risks for legal discrimination or hostile work environment concerns if input is overtly negative
 - Identification of trends in comfort levels for openly identifying as LGBT in the workplace
 - Solicitation of input to drive improvements
 - Maintaining the company's 100% score on the HRC Corporate Equality Index

Why Collect Data - KPMG?

- Monitor and measure the impact and success of KPMG's diversity initiatives and programs
- Leaders accountable for addressing the outcomes and taking appropriate action.
- Canadian Employment Equity Act requirement to do business with the government
- Target and meet the needs of its people as employees

<http://www.ohrc.on.ca/en/resources/casestudy/kpmg>



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25

Perception vs. LGBT reality

1. Interest

The perception

What LGBT employees are saying



■ “Why should I come out if there are no Out leaders?”

■ “Too much risk for me to come out, I fear discrimination at work”

■ “I want to be mentored by an Out and Proud Vice President, where are they?”

■ “Our membership drive tool is Gaydar, where are our LGBT employees?”



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Where should we begin as it relates to Self ID

3. Commitment

Clarity of scope

In scope:

Where- Canada and US XIG & Public sector

What vehicle – Employee Engagement Survey and/or HR Employee Profile

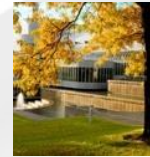
Out of scope:

Where- International business groups

What vehicle –any HR system or survey unrelated to demographics

Process start: when Xerox communicates process for optional employee profile modification and when Xerox employees can opt in or out to self ID for the EES service and HR Employee Profile

Process end: demographic info is deployed within HR metrics reporting



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June 8, 2009
For Internal Use Only

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 - **Approaches**
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28

KPMG Tools

- **The Pulse Survey**
 - Annual employee engagement survey (16 statements out of 90 on diversity)
 - Some measure and track how people perceive and experience the workplace
- **The Diversity Profile Tool**
 - automated process collect specific demographic data on its employees
 - 14 questions
 - 4 mandatory questions on membership in the four designated groups required under the Federal Contractors Program (FCP)
 - 10 additional questions relating to: cultural background and national heritage, religion and faith, primary language, marriage and parental status, sexual orientation, and foreign trained professional status.

<http://www.ohrc.on.ca/en/resources/casestudy/kpmg>



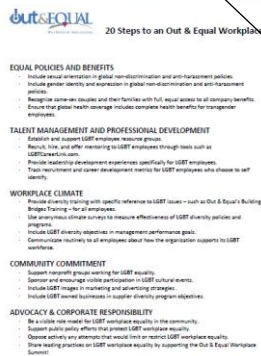
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29

Identifying gaps that can be closed

2. Development

Opportunity !!!



TALENT MANAGEMENT AND PROFESSIONAL DEVELOPMENT



Establish and support LGBT employee resource groups.



Recruit, hire, and offer mentoring to LGBT employees through tools such as LGBTCareerLink.com.



Provide leadership development experiences specifically for LGBT employees.



Track recruitment and career development metrics for LGBT employees who choose to self identify.



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Tool - LSS Project Charter

2. Development

Xerox Lean Six Sigma Project Charter	
Project Name: Self ID for LGBT employees at Xerox Corporation	Date: July 7, 2008
Organization: Galaxe Pride at Work	Deployment Manager: rja
Project Sponsor: Bill Steenburgh	GB Candidate: Sue Mayrand
Business Impact	
The mission of Galaxe is to offer support and visibility for members within Xerox & beyond and to provide official point of contact between its membership and Xerox Corporation, as well as other lesbian, gay, bisexual, and transgender organizations external to Xerox.	
In 2008, Galaxe's 1st of 3 major objectives is: Establish Self Identification for LGBT employees. The self identification initiative is to develop a voluntary lesbian, gay, bisexual and transgender (LGBT) self-identification process, which Xerox can use to measure success of recruitment, retention and professional development of their LGBT workforce.	
Opportunity or Problem Statement	
Since the inception of the Employee Engagement Survey (EES) at Xerox, the LGBT community has not been given the opportunity to voluntarily self-identify. As an oft-invisible community, the current EES process does not allow for the inclusion of the LGBT community.	
Goal Statement	
This project will add sexual orientation and gender identity/expression to the demographics tracked in the Xerox Employee Engagement Survey.	
We will be successful:	
<ul style="list-style-type: none"> • When LGBT can voluntarily self-identify during the Xerox ESS process • When it is launched worldwide • When there is a process to collect the data specific to the LGBT community that generate improvements metrics • When recommendations are part of the 'new Xerox culture' 	

Senior VP

Talent fuels innovation; costly to lose employees



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Tool - LSS Project Charter continued

2. Development

Project Scope
In scope
<ul style="list-style-type: none"> • North America • Work Processes associated with development/delivery of Employee Engagement Survey
Out of scope
<ul style="list-style-type: none"> • Countries outside North America • Survey development unrelated to employee demographics
Process start
<ul style="list-style-type: none"> • Decision to survey Xerox employees
Process end
<ul style="list-style-type: none"> • Survey implemented
Team Selection
SMEs: Galaxe Board OGC (?) LGBT Self-ID Community of Practice Benchmark corporations: IBM, KPMG, Goldman Sachs, JPMorgan Chase

Reality of where can we launch

Find your mentors, influencers and doers



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Tool - LSS Risk Mitigation matrix

2. Development

4 major areas of Risk review:

1. Operational
2. Economic
3. People
4. Technology

Description of Risk	Risk Factors	Level of Risk H, M, L	Mitigation Plan
Operational Risk			
Investment of time and funds to create or develop a new process for Self ID	Current economic considerations and people could impact the Self ID initiative.	L	Ensure prioritization is support by the Sr. Leadership team. Collaborative cost / benefit of any investment required.
Change Management for Xerox Employees understanding their Role and Responsibility to sustain an open environment.	Not aligned within Corporate. Opinion based vs. future.	L	Conduct an Out Leadership Roundtable to gain understanding of business for Self ID.
Economic Risk			
Business growth opportunities through Diversity Partnership	Engagement of those corporations we currently are in business with minimal to limited communication to business decision makers of Xerox's values and initiative.	H	Share the Diversity story and engage in greater frequency via Sales communications and from the and our Diversity Office.
Marketing opportunities in \$1.1 Trillion Revenue plan	Inhibit the Fast Start potential in Revenue generation via Marketing and sharing of Corporate Values and Strategy in Diversity.	H	Focus with Corporations supporting the Business Case for Gender, Tax Equity. Include Sales and the Diversity Office in the discussion.
Losing talent (to competition)	Client business relationships lost and not comprehended for cause.	H	Include specific questions supporting all Diversity alignments in our package.
People			
Employee retention data not fully comprehending hands and minds for an employee leaving the Corporation.	Loss of talent and resources. Employee satisfaction.	H	Include specific questions supporting all Diversity alignments in our package.
Talent recruitment initiatives not fully realized	Ability to engage current Xerox, LGBT employees to participate in recruitment efforts minimized.	H	Self-ID action supports corporation statement of inclusion and enables HR to focus recruitment activities for greater gain.
Building and maintaining our Corporate Culture and Identity	Due to current economic conditions, investments in education and leadership attribute training have been suspended.	H	Incorporate current changes in management development training to include mandatory diversity training and behavior expectations.
Technology			
HR system selected to capture demographics for LGBT data.	System costs inhibit program changes providing factual data for the Corporation.	M	Engagement of appropriate HR - IT / Programming team to understand Risk and next steps.

Economic risk- high: to sustain our leadership in business process and document management we needed to be a leader in talent management as well. Aligning with our customers.

People risk- high: without an inclusive Climate retention of valuable employees is difficult



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Adding to current Employment Equity Questionnaire

Wednesday, February 16, 2011 07:34

4. Implementation

It is mandatory that all Xerox Canada employees complete the Employment Equity Questionnaire. This is a requirement under the Federal Contractors Program as a supplier to the Federal Government. Please answer the following two questions and save your responses.

Employment Equity Questionnaire

1. Aboriginal (Native) Peoples / Visible Minorities

For the purposes of employment equity, an Aboriginal person is a North American Indian, Métis, or Inuit and/or a Treaty Indian or a Registered Indian and/or member of an Indian Band / First Nation.

Aboriginal / Visible Minority declaration
 Not a visible minority

For the purposes of employment equity, members of visible minorities are persons, other than Aboriginal peoples, who are non-Caucasian in race or non-white in colour, regardless of birthplace. Examples include: Black, Chinese, Filipino, Hispanic, Indo-Pakistani, Japanese, Korean, South East Asian, West Asian, Arab, etc.

2. Persons with Disabilities

For the purposes of employment equity, "persons with disabilities" means persons who have a long-term or recurring physical, mental, sensory, psychiatric or learning impairment and who

Disability declaration
 No

- consider themselves to be disadvantaged in employment by reason of that impairment, or
- believe that an employer or potential employer is likely to consider them to be disadvantaged in employment by reason of that impairment,

and includes persons whose functional limitations owing to their impairment have been accommodated in their current job or workplace.

Examples of disabilities

Physical (Visible)
 Arthritis, joint or back problem requiring job alteration, paraplegic, amputee

Sensory
 Deafness or partial hearing, glaucoma, vision impairment not corrected by glasses/contact lenses

Physical (Non-visible)
 Diabetes, thyroid disorder, MS, hemophilia, epilepsy, addition

Mental or Psychiatric
 Cerebral vascular accident, stroke, hydrocephalus, previous mental illness, or psychosis such as schizophrenia or depression



Save



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Sequence of critical actions

4. Implementation

1. Finalize questions

How do you describe yourself in terms of sexual orientation identity? (check all that apply)

- Gay man
- Lesbian/Gay woman
- Bisexual
- Heterosexual/Straight
- Queer
- Questioning
- Asexual
- Please specify _____
- Prefer not to say

How do you describe your gender? (check all that apply)

- Female
- Male
- Intersex
- Transgender woman (MtF)
- Transgender man (FtM)
- Transgender (unspecified)
- Gender queer
- Two Spirit
- Bi-Gender/Dual-Gender
- Please specify _____
- Prefer not to say



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Steps to LGBT Self ID

- Considerations
 - Business Rationale for Self ID
 - Approaches
 - **Insights & Barriers**
 - What to do with results

http://www.hrc.org/documents/LGBT_Self-IdentificationReport_-_2009-05-08.pdf



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36

Dell's Legal Considerations

- **Privacy and Confidentiality:**
 - Use same standards as EEOC data: voluntary, no individual identification, data protection (consent of employee must be obtained for the collection, use or disclosure of personal information, except where not required to do so by law)
- **Communication:**
 - Why questions are asked and reaffirmation of commitment to fair treatment of all employees
 - Intended uses of the information
- **Global Considerations:**
 - Start in U.S., but don't roll-out indiscriminately in other countries
 - Some countries cannot provide safe harbor for staff who choose to self identify
 - Need to consider how to handle individual employee records for expats in countries without LGBT protection
- **Bigger Picture:**
 - Should not be limited to LGBT self-identification, but part of an overall diversity and identification program that drives towards maximum employee engagement and accurate data

KPMG Planning Challenges

- Develop statements that can be tracked and measured every year
- Comparing Data to Pulse Survey
- What if they don't Self ID?
- Small sample size (descriptive results versus statistical significance)

<http://www.ohrc.on.ca/en/resources/casestudy/kpmg>

KPMG Meeting the Challenges

- Made diversity a strategic business priority
- Set goals for the project
- Worked closely with an external provider and subject matter expert create statements
- Allowed the respondents to provide feedback
- Collected and analyzed qualitative data gathered through such methods as focus groups to identify different workplace experiences
- Used different approaches to track and address issues that affect groups that may not self-identify and/or may not have a large enough sample size
- Buy in from all key decision-makers/stakeholders
- Piloted program with a national HR group and used their feedback
- Consulted other HR staff
- Identified champions as key communicators

<http://www.ohrc.on.ca/en/resources/casestudy/kpmg>

KPMG Meeting the Challenges (cont'd)

- To address privacy and confidentiality concerns, involved both internal and external legal counsel in preparing the demographic data collection questions, to make sure KPMG was meeting all legal requirements. Respondents were assured that all responses were anonymous.
- Conducted an extensive communications plan so that respondents understood key points such as why the demographic questions were being asked and how employees benefited from taking part.
- Addressed privacy and confidentiality concerns, via the communications strategy and detailed FAQs,

<http://www.ohrc.on.ca/en/resources/casestudy/kpmg>

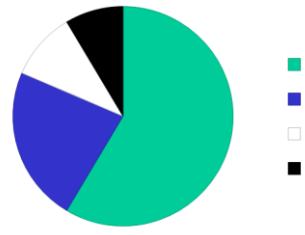
Ability to capture data in current database

4. Implementation

Assure stringent Privacy Laws

- ✓ **Identifying Purposes for Collection**
- ✓ **Obtaining Consent for Collection, Use or Disclosure**
- ✓ **Limiting Use, Disclosure and Retention**
- ✓ **Safeguards**

Employee Population



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41

Benchmarking- Leadership team inquiries

2. Development

- What Gap are you trying to solve with SELF ID?
- What were the challenges encountered Implementing SELF ID? How did you mitigate and handle them?
- How did modifying the Employee Profile to include this metric become important to your company? Impact?
- Did you set success measures for your company by moving forward with SELF ID? Can you share some examples of your measures?



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Benchmarking- the realities

2. Development

What we found out:

- Low turn out rate
- LGBT community is weary of sharing



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Engaging Allies with influence

3. Commitment

- Allies are critical
- Who are our highest ranking and present to their team
- Create critical mass.



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Steps to LGBT Self ID

- Considerations
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 - Insights & Barriers
 - **What to do with results**

http://www.hrc.org/documents/LGBT_Self-IdentificationReport_-_2009-05-08.pdf



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45

When will we be successful ?

4. Implementation

All our LGBT employees self identify
 Corporation analyses data to assure HR programs are working.
 Corporation with GALAXe look at retention, hiring and promotions
 Out and proud leaders at all levels of our organization
 LGBT broader community is seeking Xerox as an employer of choice.



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46

Identify your Phase 2 while implementing Phase 1

5. Recycle

1. Assure Phase 1 becomes a best practice
2. Position this success to be replicated in other communities , organizations or other countries



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47

KPMG Key Results – Pulse Survey

- Increased 12-18% higher to the statement, “My future career opportunities look good here at KPMG, overall.”
- Many groups are feeling more positive in terms of gender and visible minority stereotypes being effectively addressed
- Creating a welcoming, inclusive environment is enabling employees to bring more of themselves to work, resulting in higher productivity and increased loyalty to the firm
- Embed diversity in the business and address work-life effectiveness, through initiatives like Fitness Memberships, flexible work programs and reflection rooms, translate into lower absenteeism and sickness – and healthier employees
- If effectively promote programs, more people will access and benefit from them (e.g. the Sabbatical Leave program)

<http://www.ohrc.on.ca/en/resources/casestudy/kpmg>



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48

KPMG Key Results - DPT

- Because the DPT recently launched, KPMG has no key results to report
- Expected report on key results by the end of the fiscal year
- Based on available data from the last Canadian Census, KPMG's Toronto offices represent the communities they serve – having higher than average representation of measured groups
- The DPT is able to adequately gauge KPMG's demographics

<http://www.ohrc.on.ca/en/resources/casestudy/kpmg>

Contact Information

- Pat Baillie, Associate Director of Training and Professional Development, Out and Equal Workplace Advocates – pbaillie@outandequal.org, 415-694-6521
- Terry Hildebrandt, Executive Coach & Organization Development Consultant – terry@terryhildebrandt.com – 720-318-6625
- Gene Johnson, PhD, Director, Talent Management Dell EMEA - johnson_gene@hotmail.com +44 1273 749 629
- Susan Mayrand, Senior Consultant (Bilingual), RFP Center of Excellence, Xerox Canada – Susan.Mayrand@xerox.com, 416-733-6050
- Elizabeth J. Reynolds, Diversity Generalist Diversity, Equity and Inclusion, KPMG Canada - ejreynolds@kpmg.ca

Questions & Answers



- *How to ask a question...*
 - Online - use chat mode anytime during webinar
 - Raise your hand and unmute your phone
- *Add to the discussion...*
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Closing Comments



Thank you for your participation!



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July 28 – The Business Case for Marriage!*

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**More questions?
Contact Pat Baillie, Associate Director of Training
pbaillie@outandequal.org - 415-694-6521**



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53