

# Checking the Box

## The Self-Identification of LGBT Employees at Your Business

Out & Equal Summit

October 2010

## Our Presenters

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  - Out & Equal Workplace Advocates
- **Chris Crespo**
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  - Ernst & Young
- **Deena Fidas**
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  - Human Rights Campaign Foundation
- **Terry Hildebrandt**
  - Executive Coach and Organization Development Consultant
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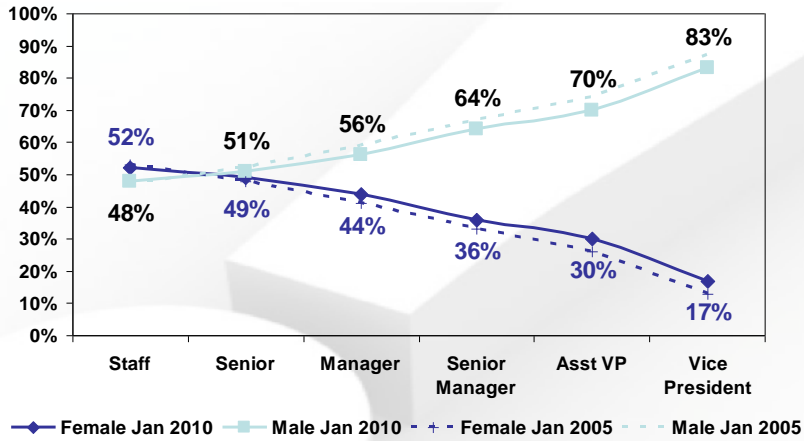
# Agenda

- What is it? Why do it?
- Who's doing what?
- What have we learned?
- Overcoming the barriers to implementing
- Using the collected information
- “Next” practices in LGBT self-identification

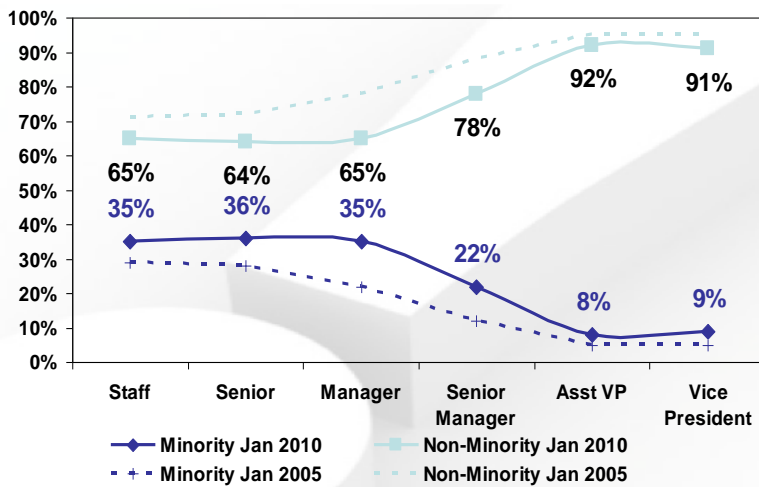
## What is it?

- Ability for those who identify as LGBT to self-identify via company-wide surveys and Human Resources systems
- Similar to collecting other demographic information like gender, ethnicity, veteran status – some of which is required by law
- **Two types:**
  - Anonymous Climate Surveys
  - HR Tracking

## Closing the gap: Gender



## Closing the gap: Minority

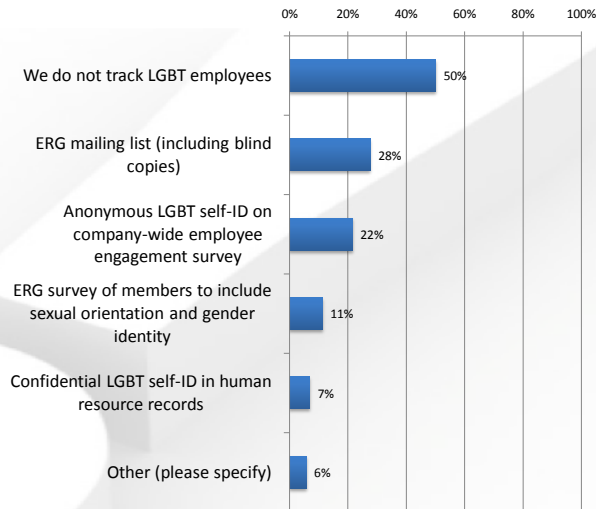


## Who's doing what?

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.)



## Who are they?

- Bank of America Corp.,
  - Corning Inc.,
  - Ernst & Young LLP,
  - Hewitt Associates Inc.,
  - IBM Corp.,
  - J.P. Morgan Chase & Co.,
  - Merrill Lynch & Co. (now a part of Bank of America Corp.), and
  - Sun Microsystems Inc.
- Do we need to take Sun off the list since they have now changed to Oracle? The others I believe were from the report so we might want to say this is the data we had 2 years ago!

## Why do this?

- **Can't fix it unless you measure it**
- Signal of inclusion to the workforce
- Critical in evaluating the success of LGBT-inclusive practices with regard to recruitment, retention and productivity
- Insights from Degrees of Equality and other surveys
- Lays the foundation for workplace climate surveys

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### HRC CEI

#### Criteria 3.0 –

Add'l Requirements

- ✦ **firm-wide diversity and competency training and metrics**

#### ➔ **at least two:**

- ➔ new hire training
- ➔ supervisor training
- ➔ leadership training
- ➔ gender transition guidelines
- ➔ senior management performance measures LGBT diversity

#### ➔ **and one of the following:**

- ➔ anonymous surveys of all employees collect gender identity/sexual orientation data
- ➔ employee records collect gender identity/sexual orientation data

[www.hrc.org/LGBTselfid](http://www.hrc.org/LGBTselfid)

## What HRC is asking about

- 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 HRC is **not** asking about

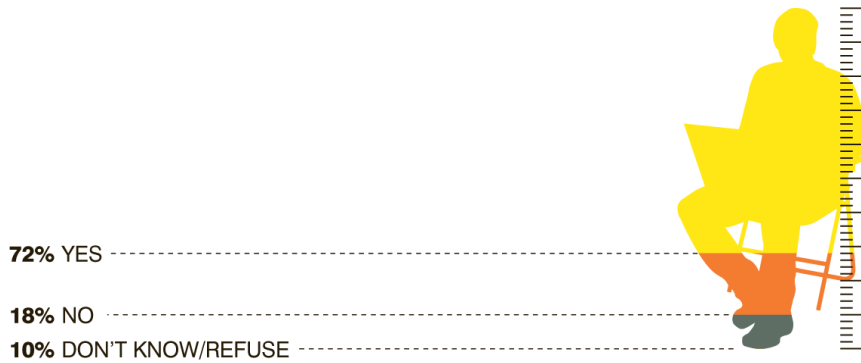
- Quotas on LGBT employees hired or positions held (e.g. senior leaders)
- Reporting to HRC on the number of LGBT employees in your business.
- Separate surveys for LGBT employees.

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## What have we learned?

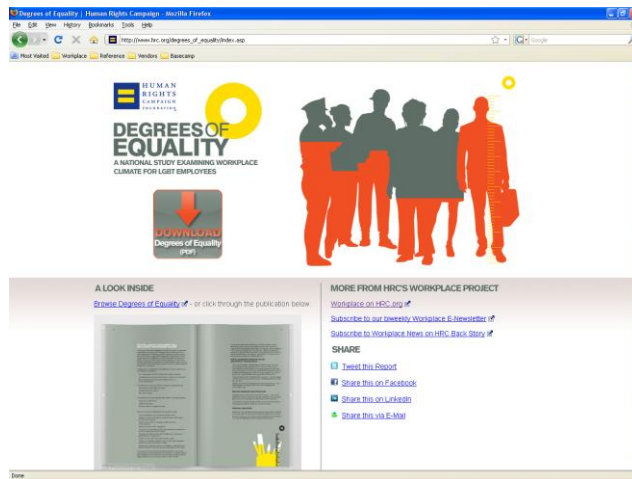
- Degrees of Equality
- Community of Practice

# Willingness to Self-Identify as LGBT



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[www.degreesofequality.org](http://www.degreesofequality.org)



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## Community of Practice Report:

Where are our LGBT Employees?

- [http://www.hrc.org/documents/LGBT\\_Self-Identification\\_Report\\_-\\_2009-05-08.pdf](http://www.hrc.org/documents/LGBT_Self-Identification_Report_-_2009-05-08.pdf)
- Almost 80 professionals representing more than 35 U.S. and Canadian employers and nonprofit organizations, including Out & Equal Workplace Advocates and HRC Foundation

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## Insights from the report

### Business Rationale

- Having business metrics to quantitatively evaluate these programs is **critical to growing and expanding a viable diversity program.**
- Employers typically capture an employee's race, ethnicity, gender and sometimes military and disability status to **quantitatively evaluate recruitment and retention across the entire organization and within individual business units.**

Bottom Line

- **It makes good business sense to leverage existing data collection methods to also track and gain a more complete picture of LGBT employees.**

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## Insights from the report

### Business Rationale

- ***With a ‘non-visible’ minority such as [LGBT workers], it used to be difficult to give managers real numbers of employees impacted to help them make important business decisions. Now that we have actual numbers, those discussions are much easier. We can tell managers that X number of employees in their site will be affected by a decision. Additionally, and perhaps most importantly, senior leaders of the firm receive results of their business unit’s performance across all key measures. This has helped us to identify specific areas for improvement across many of the diversity criteria... Allowing LGBT employees to self-identify... enabled the firm to better understand and respond to the needs and experiences of LGBT employees relating to satisfaction with the organization, retention, growth opportunities [and] inclusion. J.P. Morgan Chase & Co.***

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## Insights from the report

### Approaches

- ***Anonymous engagement surveys.*** Existing organizational climate surveys, typically anonymous, can include *optional demographic questions on gender identity and sexual orientation which can then be reported through aggregated data broken down by business unit or function.*
- ***Confidential employee records.*** Existing human resource information systems (HRIS) ask employees to *optionally provide demographic data and 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.*

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# Issues and Barriers

- Wording the question(s)
- Getting results - will LGBT people respond?
- Privacy and legal concerns
- Getting the initiative approved within your company
  - Meeting business objectives of employers
  - Why capture this info? We don't ask about religion.
  - Why the special treatment?

## Wording the questions

### Sample Questions

One single LGBT identification question:

- Do you identify as lesbian, gay, bisexual and/or transgender?  
(Yes/No/ Other\_\_\_\_/Prefer not to say)
  - IBM and Merrill Lynch & Co. (now a part of Bank of America Corp.), both asked a single question like this to include in confidential employee records.

Some employers take the —select all that apply approach for demographic questions, which ask the employee to choose among a wide array of demographic questions.

- Corning Inc. uses such a question with options for the respondent to check all that apply.

## Wording the questions

### Sample Questions

Separate questions on sexual orientation:

- What is your sexual orientation? (lesbian, gay, bisexual, heterosexual/ straight , asexual, other \_\_\_\_\_, Prefer not to say)

And gender identity:

- Is your gender identity different from the sex you were assigned at birth? (Yes/No/other \_\_\_\_/Prefer not to say)
- Are you / do you identify as transgender? (Yes/No/ Other\_\_\_\_\_/Prefer not to say)
- What best describes your gender identity? (Man, Woman , Other \_\_\_\_\_, Prefer not to say)

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## Will they self-ID?

### Tips on Getting Results

- Have senior leaders acknowledge the new questions in communications along with the business rationale for them and assurance of data safeguards.
- Enlist the help of your ERG to promote willingness to self-identify.
- Allow familiarity and trust in the process to build in the first few years – this will seem new to both LGBT and non-LGBT employees at first.

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## Will they self-ID?

### Tips on getting results – in their own words

- *We had to admit that the reported numbers would likely underestimate the actual numbers since some GLB and T employees are too afraid to identify themselves even on anonymous surveys. But, we argued that some data is better than no data, and the act of gathering the data is likely to promote an atmosphere of acceptance. Over time, this will provide positive feedback to the data gathering process, such that someday we will get accurate data*
  - *Corning Inc.*

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## Insights from the report

### Tips on getting results – in their own words

- *One of the biggest challenges is getting respondents to self-identify. Data gathered through the Employee Opinion Survey represents only the views of those who voluntarily self-identify – thus, it may not represent the LGBT community as a whole. So, our Corporate Diversity group has enlisted the Employee Networking Groups at the firm to encourage their members to self-identify on the Employee Opinion Survey. This has helped, and trust continues to grow as employees see how the firm handles the data.*
  - *J.P. Morgan Chase & Co.*

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## Privacy & Legal Concerns

### Similar to other data

- None of the employers surveyed in this effort encountered legal concerns that would prohibit self-identification through either method.
- As with any type of engagement survey that includes demographic data (e.g.: race, ethnicity, gender), organizational leaders need to be prepared to take corrective action should the data reveal that discrimination is occurring.
- ENDA: Proposed legislation explicitly precludes the Equal Employment Opportunity Commission from collecting data based on gender identity or sexual orientation. No employers surveyed in this effort expected any changes to their self-identification method should such legislation be enacted as law.

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## Getting approved

- How can you meet the business objectives of your employer
  - Success stories of other companies or competition
  - Fully vetted proposal
  - What do you want to do with the information?
- Prepare for the questions
  - Why capture this info? We don't ask about religion.
  - Are you trying to get special treatment?

## Using the information

- Aligning it with uses of other demographic information for recruiting, retention, promotion
- Employee satisfaction survey information
  - Raise awareness of workplace issues to truly make your inclusion real
  - Comparison data for gauging engagement
- ERG budgeting purposes

## “Next” Practices

# Resources

[www.hrc.org/workplace](http://www.hrc.org/workplace)

[www.hrc.org/newcei](http://www.hrc.org/newcei)

Groupsite for Community of Practice  
<https://lgbtselfid.groupsites.com/main/summary>

Report from Community of Practice  
[http://www.hrc.org/documents/LGBT\\_Self-Identification\\_Report\\_-\\_2009-05-08.pdf](http://www.hrc.org/documents/LGBT_Self-Identification_Report_-_2009-05-08.pdf)

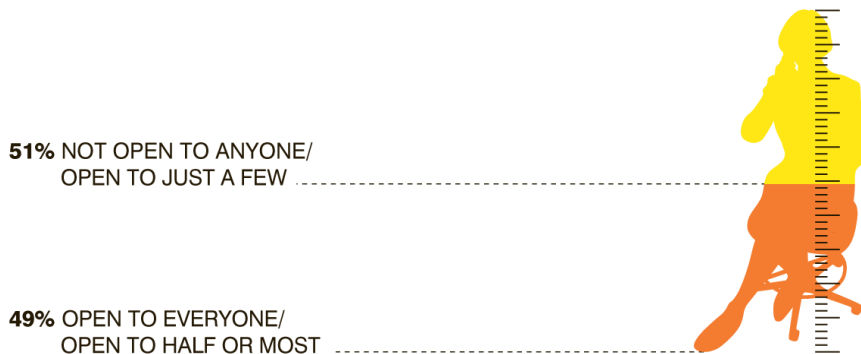




## DEGREES OF EQUALITY: A NATIONAL STUDY EXAMINING WORKPLACE CLIMATE FOR LGBT EMPLOYEES

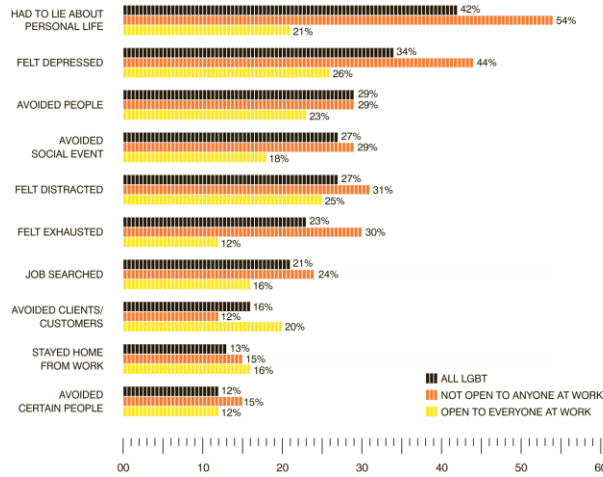
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### Degrees of Openness at Work



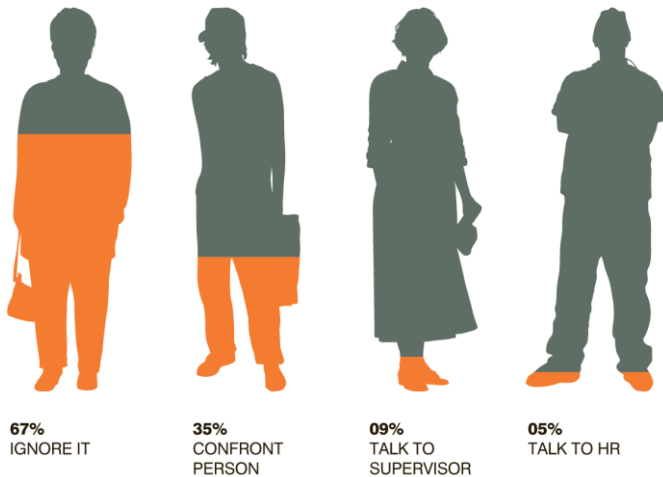
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## Effects of Climate



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## How LGBT Employees Deal with Anti-LGBT Comments



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# Standard Engagement Measures Not Enough

