



# Cross team effectiveness in a diverse and geographically dispersed organization

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**Rebecca (Becky) Gruss**  
**Eddie Daniels**

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# Presenter bios



## **Aaron Wright**

Manager

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Aaron Wright, CPA is an audit manager with Deloitte in the Indianapolis office. Within GLOBE, Deloitte's LGBT and ally business resource group, he has served as the North Central Regional Chairperson as well as currently representing Deloitte within the Accounting Group of the Professional Services Alliance for LGBT Inclusion. He is also a founding member and currently serving as Chairperson of Out & Equal Indiana. Aaron lives in Indianapolis with his husband Russ.



## **Andy Coutts**

Senior

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Andy Coutts joined the Audit and Enterprise Risk Services practice at Deloitte in August 2007 where he focuses on external audits mainly within the consumer and industrial product industry. He serves on Deloitte's North Central regional board of its LGBT and ally business resource group. He also champions the BRG's efforts at Deloitte's Cleveland, OH office. He is a CPA and currently resides in Lakewood, OH.

As used in this document, "Deloitte" means Deloitte LLP and its subsidiaries. Please see [www.deloitte.com/us/about](http://www.deloitte.com/us/about) for a detailed description of the legal structure of Deloitte LLP and its subsidiaries.

## Presenter bios (cont.)



**Rebecca (Becky) Gruss**  
Partner  
Deloitte & Touche LLP  
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Tel: +1 216 589 5616

Rebecca (Becky) Gruss is an audit partner in Deloitte & Touche LLP's Cleveland office with over 16 years of audit and accounting experience, serving clients in the real estate, consumer products and manufacturing industries in both the private and public sectors. Becky is a strong ally supporter of the LGBT community and is the partner sponsor for North Central GLOBE, Deloitte's LGBT and allies business resource group. Becky resides in Cleveland with her husband and two children.



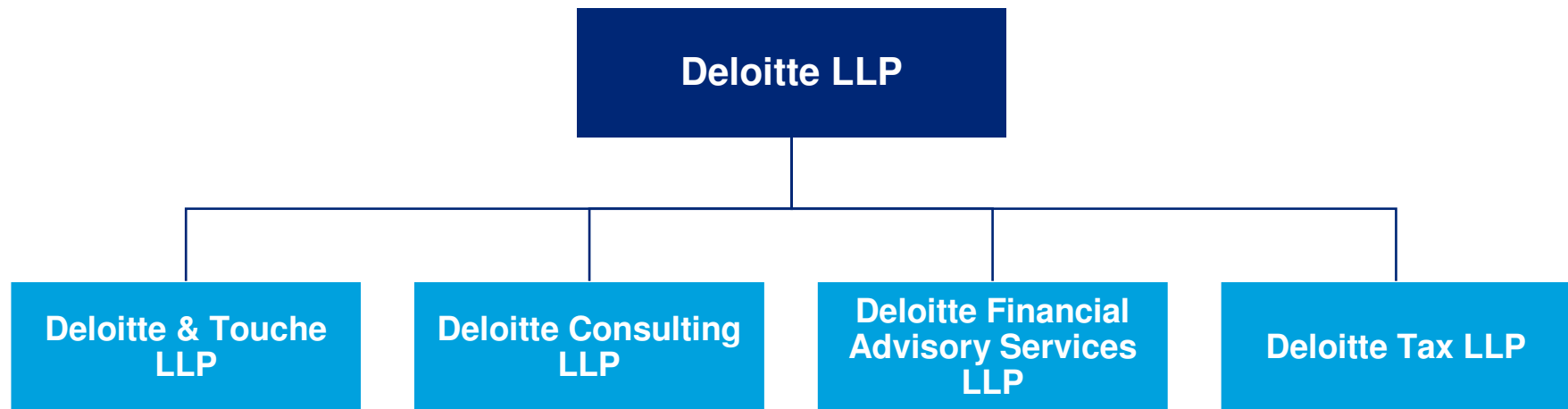
**Eddie Daniels**  
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Eddie Daniels joined Deloitte Consulting in May of 2005 in the SAP Service Line and focuses on Mid-Size to Large SAP ERP Business Transformation projects. He helped start and served as the first Chairperson of the North Central LGBT and ally business resource group.

# Overview

- Deloitte facts and figures
- Deloitte's approach to Diversity & Inclusion
- Gay, Lesbian, Bisexual or Transgender Employees ("GLOBE") & Allies structure
  - National PMO
  - North Central region
- North Central GLOBE & Allies ("NC GLOBE") leadership model
- NC GLOBE & Allies programming
- Q&A/group discussion

# Deloitte facts and figures



**Over 42,000 professionals (170,000 globally)**

**Located in most every major U.S. and world city**

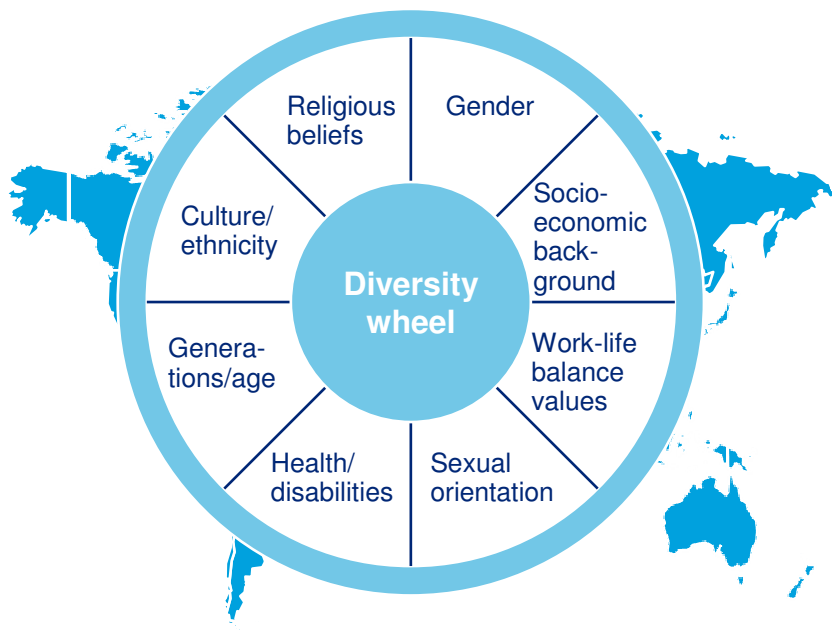
**102 offices in U.S. (600 offices in 140 countries worldwide)**

**\$11.9 billion in U.S. revenue (\$26.6 billion globally)**

# Deloitte's approach to Diversity & Inclusion

# Our working definition goes beyond the traditional compliance-based interpretations

## Typical aspects of diversity



## DIVERSITY...

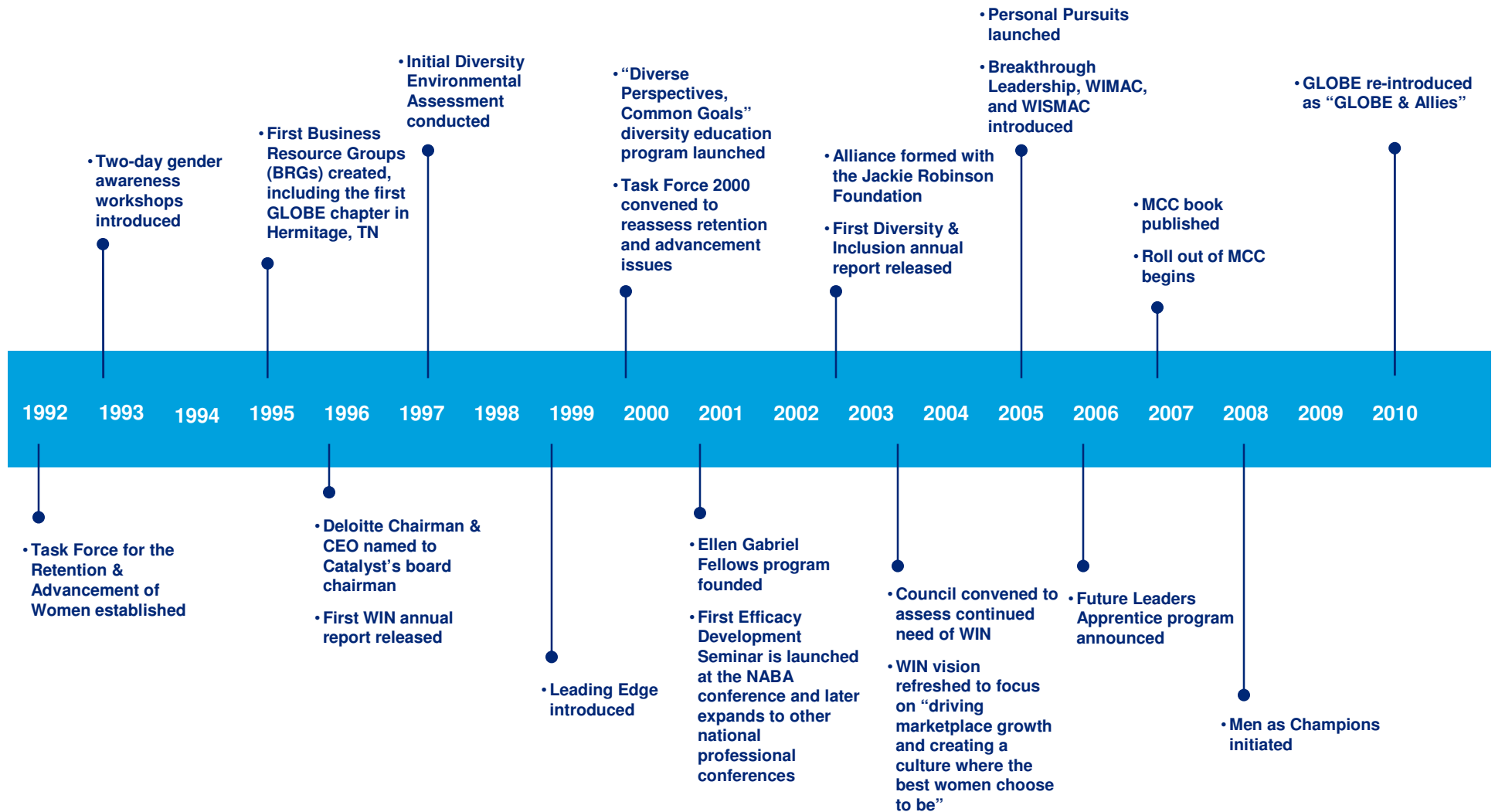
- Describes the unique identity-shaping characteristics that make up the workforce. Some of the typical dimensions are described in the diversity wheel
- Diversity measures go beyond compliance with local legal regulations
- Effective diversity management enables employees to achieve individual and organizational goals by leveraging their different backgrounds, values, orientation, gender and age;



## ... measured through INCLUSION

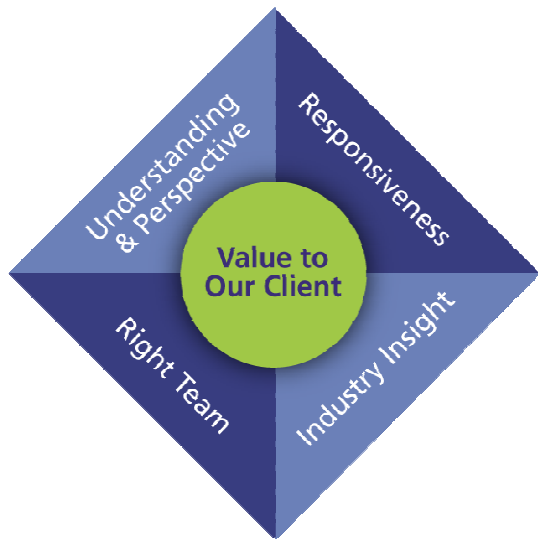
- The extent to which employees feel included and valued by an organization
- Inclusive organizations seek out and value employees' contributions to advance the company's overall success
- An inclusive workplace provides a structured environment to enable employees to contribute with their unique individual or group characteristics

# Let's take a step back and review our *All Inclusive* journey which started in 1991



# Attracting and developing diverse people allows us to deliver on our client commitments

The market for clients.



The market for talent.



**An inclusive environment:**  
Consistency of behaviors, policies, and practices that allow all of our professionals to achieve their full potential and deliver value to our clients

# The Deloitte Talent Experience encompasses a wide range of activities in addition to an inclusive environment

It is the culmination of a myriad of activities and initiatives across the Deloitte U.S. Firms...

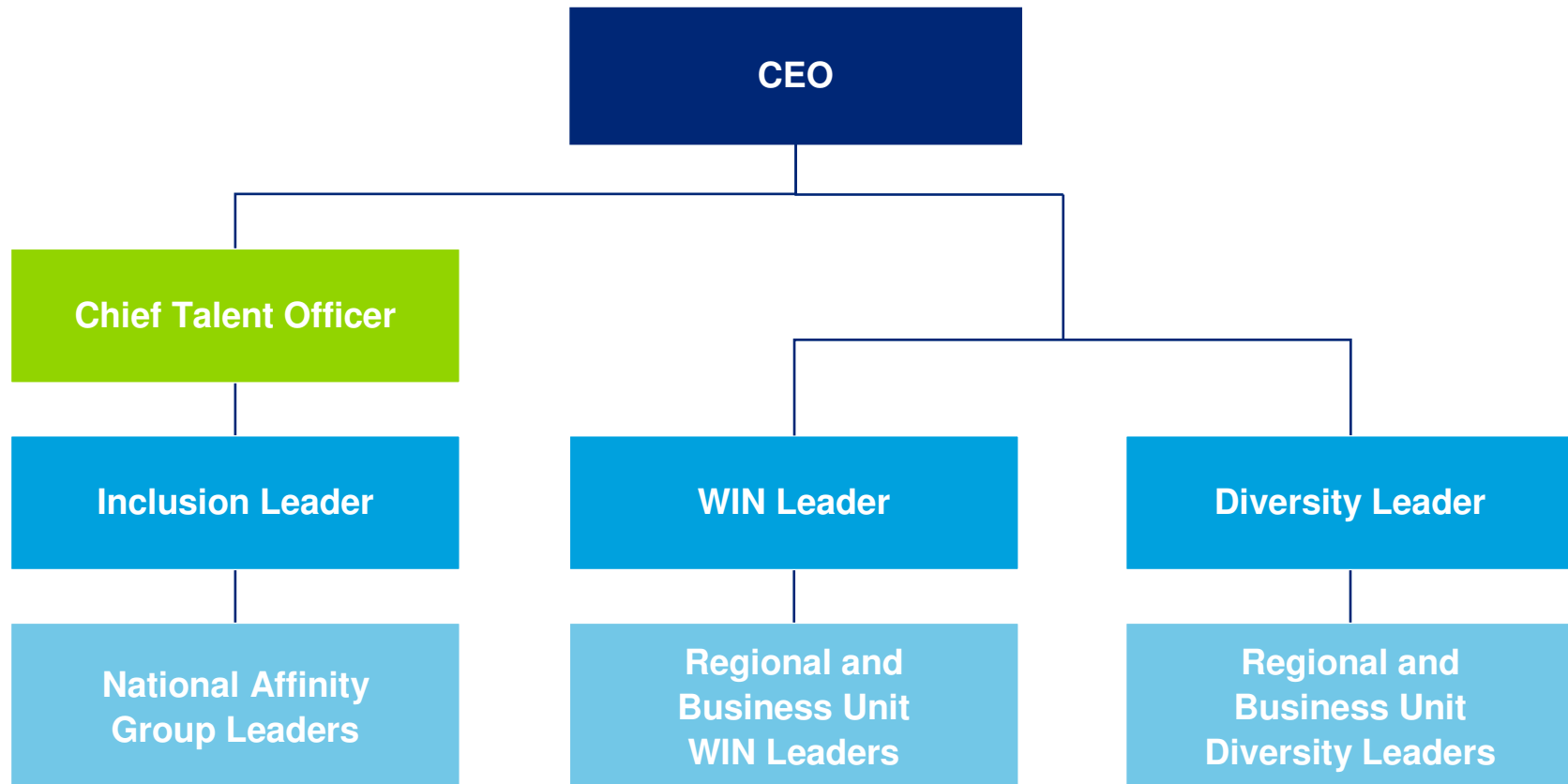
...which increases each individual's market value while enriching our collective journey along the way



## Deloitte's recent external recognition

- Human Rights Campaign's Corporate equality index 100% rating (2010 is the 4th year in a row)
- Diversity Inc's "Top 50 Companies for Diversity"
- Deloitte's WIN Initiatives wins 2010 Catalyst Award
- "100 Best Companies for Working Mothers" for the 16th consecutive year
- Fortune's "100 Best Companies to Work For"
- BusinessWeek "2009 Best Place to Launch a Career"

# Deloitte's all-inclusive organizational chart



# Business resource groups: Deloitte's approach

Networks are a key component of our all inclusive strategy at Deloitte. There are over 100 chapters of seven nationally sponsored BRG's that bring together individuals with similar interests, origins, sexual orientation, and backgrounds in a virtual forum and encourages professionals to meet, share information, and collaborate, to the benefit of our people, our clients and ourselves.

<b>Ability First</b>	Educates our professionals and raises internal awareness about people with disabilities in the workforce
<b>Asian American Alliance BRG (ABRG)</b>	Provides a forum for employees of Asian or Pacific Islander background and other colleagues who support ABRG's objectives to connect
<b>Armed Forces BRG</b>	Offers a formalized network of prior, current, and retired members of the Armed Forces (both military and civilian)
<b>Black Employee Network (BEN)</b>	Provides a forum for African-American, Black, Caribbean employees and other colleagues who support BEN's objectives to come together
<b>Lesbian, Gay, Bisexual, or Transgender Employees and Allies (GLOBE &amp; Allies)</b>	Offers a forum for Lesbian, Gay, Bisexual or Transgender employees and other colleagues who support GLOBE & Allies' objectives to connect
<b>Hispanic/Latino(a) Employee Network (HNet)</b>	Provides a forum for Hispanic and Latino(a) employees and other colleagues who support HNet's objectives to network
<b>International Network BRG (IBRG)</b>	Provides a formalized network for foreign-born employees, international assignees, and other colleagues with an interest in international issues and cultures to support each other

GLOBE & Allies

# GLOBE & Allies

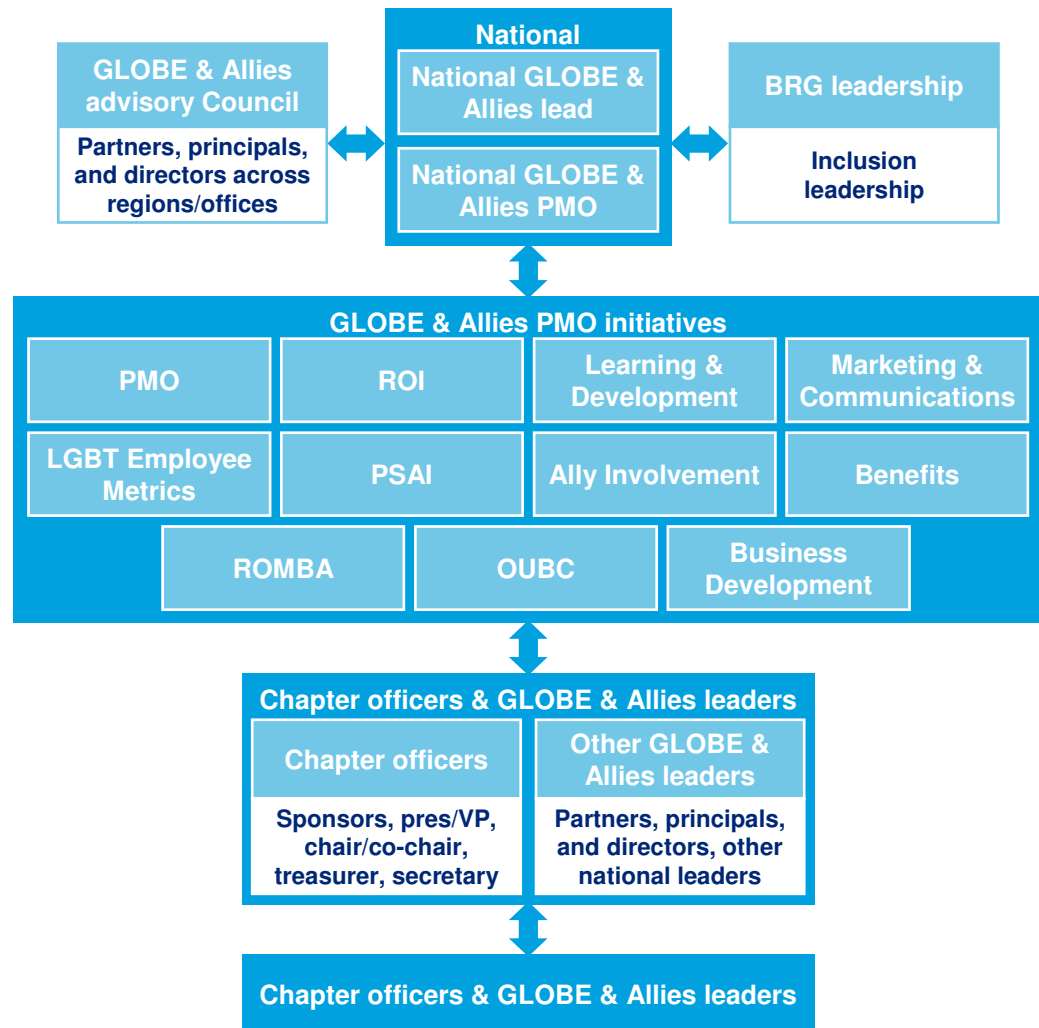
## Mission/overview:

- The Lesbian, Gay, Bisexual, or Transgender, and Allies Business Resource Group (GLOBE & Allies) provides a forum for LGBT employees and other colleagues who support GLOBE & Allies' objectives. In addition to focusing on professional development, talent acquisition and retention, community relationships, and professional networking, GLOBE & Allies members are asked to advise management on issues and concerns of importance to LGBT professionals. Participation is open to everyone, regardless of background or origin.

# GLOBE & Allies structure

## Key facts/relationships

- Highest level sponsor of Out & Equal Conference (2007-2010)
- Chairman of the Board for Deloitte LLP was keynote speaker at 2009 O&E Summit
- National Sponsor of the Human Rights Campaign
- Business Coalition for Workplace Fairness (employers that support the Employment Non-Discrimination Act).
- Lambda Legal
- Gay & Lesbian Alliance Against Defamation (GLAAD)
- Reaching Out MBA (ROMBA)
- HRC sponsored Tax Equity Coalition



# Initiatives at-a glance

The following slide outlines the mission statement of each GLOBE & Allies PMO Initiative.

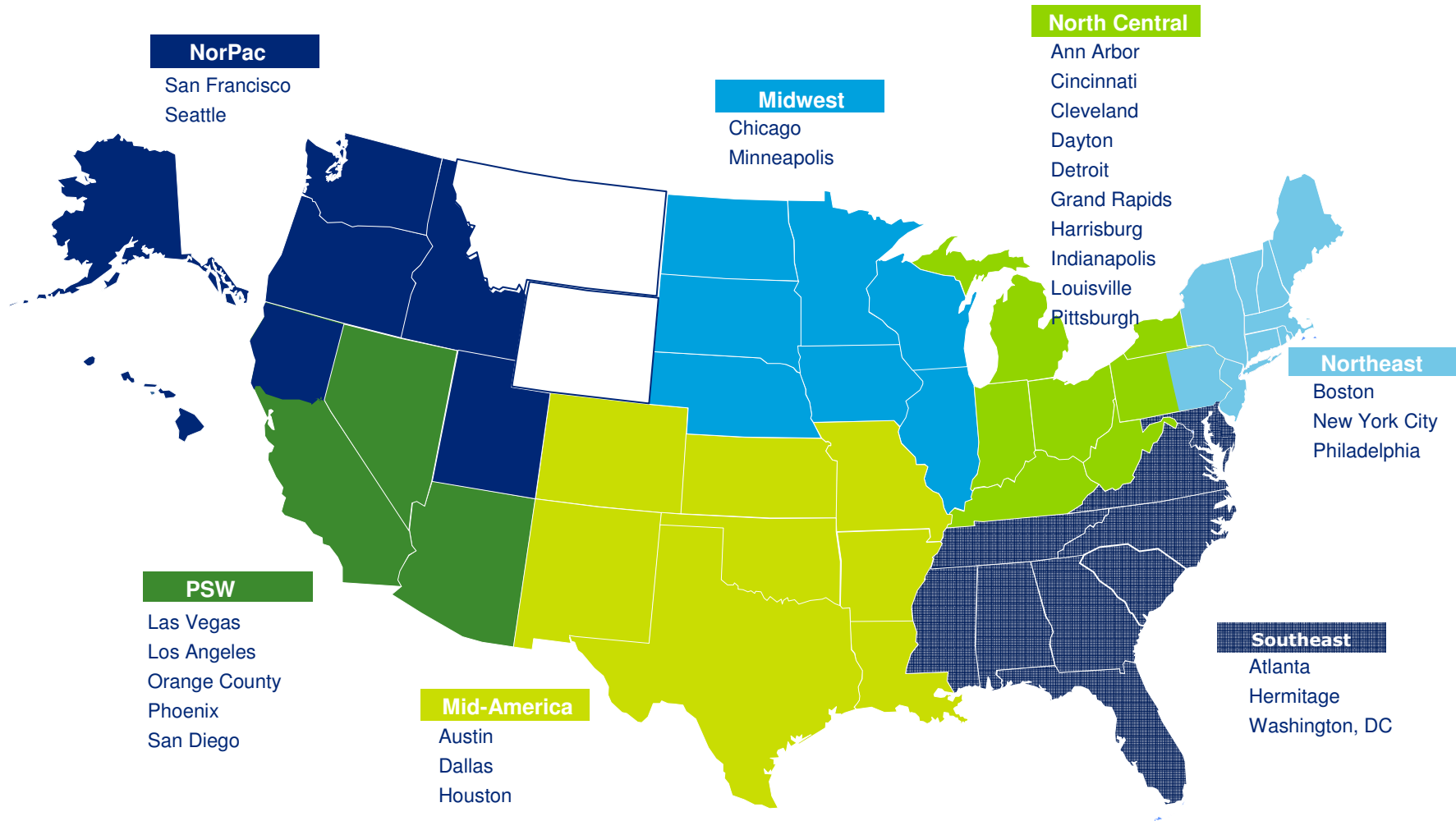
PMO initiatives mission statements		
1	PMO	Responsible for aiding GLOBE & Allies chapters by increasing their impact on the business and talent, to enable GLOBE & Allies national and local connectivity, and to drive Deloitte GLOBE & Allies' presence in the marketplace.
2	ROI	Responsible for collecting and documenting 'return on investment' (i.e., client relationships, business development, and firm revenue) from GLOBE's participation in external community and internal employee events at both the local and national levels.
3	Learning & Development	Responsible for creating LGBT specific inclusion training to enable Deloitte practitioners to increase knowledge of, develop awareness of, and identify opportunities to drive value within the LGBT community
4	Marketing & Communications	Responsible for facilitating the exchange of information to and from the PMO to GLOBE & Allies members, encouraging regional exchange of information, and developing branding and marketing materials for GLOBE & Allies.
5	LGBT Employee Metrics	Responsible for identifying how to approach capturing LGBT-specific metrics within Deloitte to enable tracking of retention and promotion rates of LGBT professionals.
6	PSAI	Responsible for leveraging and harnessing the collective strength and influence of the Big Four professional services firms to build on our individual organization's successes in an effort to collectively and dramatically change the landscape for LGBT employees. PSAI also encourages and supports regional collaborative efforts among Big Four firms.
7	Ally Involvement	Responsible for actively increasing the understanding and role of allies within the GLOBE & Allies BRG.
8	Benefits	Responsible for determining where benefits offered to non-LGBT and LGBT employees are unequal and recommending changes national benefit policies to further equality for all Deloitte employees.
9	ROMBA	Responsible for managing and planning Deloitte's relationship with and presence at the Reaching Out MBA conference, including a strong emphasis on recruiting efforts.
10	OUBC	Responsible for managing and planning Deloitte's relationship with and presence at the Out for Undergraduate Business Conference, including a strong emphasis on recruiting efforts.
11	Business Development	Responsible for identifying, supporting, and managing business development efforts for GLOBE & Allies and the PMO.

# Initiatives characteristics

- As of April 2010, the PMO is organized into 11 initiatives, each with its own sponsor and initiative lead(s). As the PMO evolves, other initiatives and/or teams may be added or re-scoped as required.
- PMO Initiatives strive to achieve tangible results on their areas of focus, benefitting both LGBT employees and allies.
- PMO Initiative governance includes the following characteristics:
  - PMO initiative will be led by a PMO Initiative Sponsor (PPD-level) and at least one PMO Initiative Lead (Senior Consultant or above), who will guide development of the initiative mission, goals, and milestones for the team.
  - The PMO Initiative Sponsor and/or PMO Initiative Leads will represent the interests of the Initiative during National PMO calls.
  - PMO Initiatives will document and report progress through a PMO Initiative Charter and Milestone Dashboard. The Charter includes the team's mission, leadership, members, objectives, and key issues/concerns. The Milestone Dashboard shows the lead, progress, target date for completion, and comments for each milestone and/or key activity.
  - PMO Initiatives will leverage either the GLOBE & Allies eRoom or the GLOBE & Allies Sharepoint site to share and maintain information, deliverables, and documents

# National GLOBE & Allies presence

GLOBE & Allies has ~700 members in 28 different chapters throughout the United States.



## PMO FY09 accomplishments

- Held six national PMO calls with all national GLOBE & Allies leaders
- Assisted national leadership in updating employee benefit policy to provide artificial insemination assistance for women without male partners
- Participated in a meeting with Joe Solmonese, president of HRC, to facilitate the development of a stronger strategic relationship between Deloitte and the non-profit
- Advised Firm leadership of non-standardized national benefits relating to “medical dependent” tax implications for those utilizing domestic partner benefits
- Developed course goals, objectives, and learning map for the GLOBE & Allies educational course for PPDs

## PMO FY09 accomplishments (cont.)

- Developed comprehensive return on investment capture tool
- Collected data and delivered report to the GLOBE & Allies PMO and larger GLOBE & Allies community
- Signed onto the HRC led Tax Equity Coalition and Business Coalition for Workplace Fairness
- Began tracking all HRC related activities that Deloitte or employees of Deloitte engage in
- Assisted and advised Firm leadership with formulating and communicating Deloitte's response to California's Proposition 8

# FY10 Bi-monthly GLOBE & Allies national member calls

**Goal:** These calls aim to keep GLOBE & Allies members nation-wide connected by providing a forum to share information relevant to both our LGBT members and Allies.

**Content:** PMO will be responsible for coordinating content.

**Timeline:** Calls are tentatively scheduled for the following dates.

Topic	Demonstrating the GLOBE & Allies ROI	You.com: Building Your Brand Through Social Networking	<i>Guest Speaker - TBD</i>	Promoting LGBT Issues in the Workplace Through Collaboration	Managing Global Virtual Teams	<i>Guest Speaker - TBD</i>
Category	GLOBE & Allies	Professional Development	TBD	GLOBE & Allies	Professional Development	TBD

# FY10 Bi-monthly GLOBE & Allies chapter leader calls

**Goal:** These calls aim to keep GLOBE & Allies Chapters nation-wide connected by providing a forum to share leading BRG practices and relevant PMO updates.

**Content:** Chapters have volunteered to share their leading BRG practices and will be responsible for developing 30 minutes of content. PMO will be responsible for the other 30 minutes of each call.

## **Suggested topics:**

- Community Involvement
- Business Development
- Pride Month Events
- Professional Development
- Retention
- Professional Relationships
- Eminence Building

# Communications

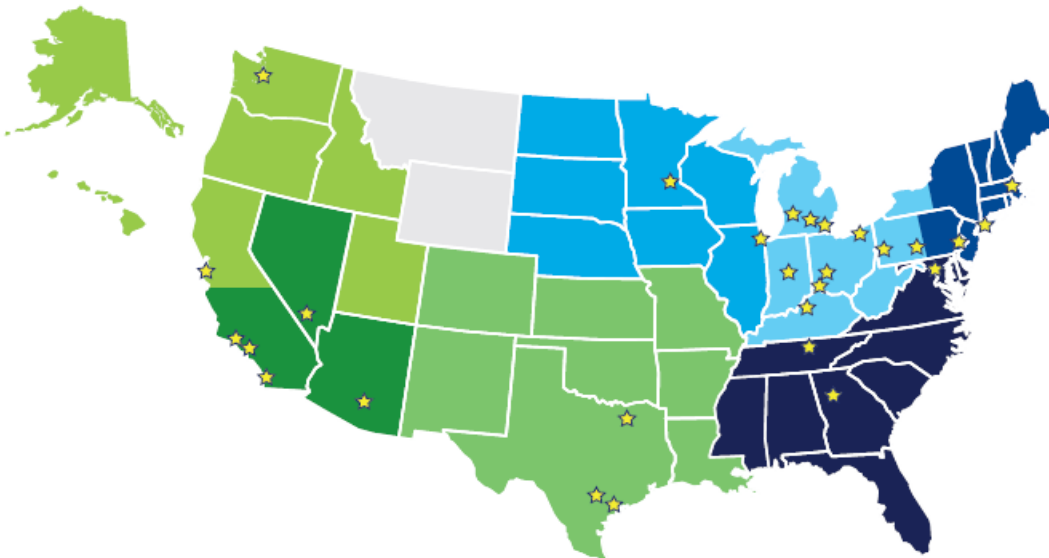
<p>GLOBE For internal distribution only</p> <h2>National GLOBE PMO News and Views</h2> <p><b>Issue No. 1</b> February 2009</p> <p>In this issue: <b>A Note from Orlan</b> Deloitte and the Human Rights Campaign PMO Initiative Summaries Harrisburg Office GLOBE Lunch 'n' Learn Questions for the PMO Do you D Street? GLOBE Chapter Leadership</p> 	<p><b>Issue No. 2</b> Spring 2009</p> <p>In this issue: <b>A note from Scott</b> Indianapolis professional works to expand workplace equality Pacific Southwest GLOBE chapter riding in AIDS/LifeCycle 8 Deloitte LLP Chair Sharon Allen joins 2009 Out &amp; Equal Workplace Summit 2009 Out &amp; Equal Summit and workshop application process LGBT call center training Legal update ROI initiative team survey GLOBE chapter leadership</p> <p><b>Issue No. 3</b> Summer 2009</p> <p>In this issue: <b>A Note from Orlan</b> Human Rights Campaign Corporate Equality Index Report Deloitte Texans Join Lone Star Ride Fighting AIDS Deloitte to present seven workshops at the Out &amp; Equal Summit Free Subscriptions and Access to DiversityInc Website Celebrate Our History: National Coming Out Day, October 11 Where Are Your Rights? Updates from the Legal Corner North Central GLOBE Recruits Allies GLOBE Chapter Leadership Contacts</p>
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- Issues were featured on front page of DeloitteNet
- Covered activities from around the country

# Marketing & Communications Initiative FY09 accomplishments: National GLOBE & Allies playbook

**Deloitte.**

The GLOBE atlas  
Highlights and  
accomplishments  
of Deloitte's  
LGBT BRG



- First National BRG playbook
- Features activities and members from around the country
- Highlights Deloitte GLOBE & Allies involvement internally and externally
- Can be used as an orientation for new employees as well as a reminder to all of us how much we do for Deloitte
- Is meant to be a revisable document for future releases
- Available online and for printing

# Professional Services Alliance for LGBT Inclusion (“PSAI”)

## Background

Following the Out & Equal Executive Leadership Forum in April, we reconvened diversity and inclusion leaders representing *E&Y, PwC, KPMG and Out & Equal* for a one-day “summit” event on September 18th, held in our Washington DC Office.

## Vision

As professional services firms, our organizations are clearly at the forefront of issues and policy making for the LGBT community and we are all recognized for our outstanding contributions. We seek to leverage and *harness our collective strength and influence* to build on our individual organization’s successes in an effort to collectively and dramatically change the landscape for LGBT employees.

## Approach

- Gathered a comprehensive list of issues and challenges for consideration as identified by each of the firms
- Collaboratively selected and prioritized key issues that will be worked this year
- Identified *Working Group Champions* who will lead *cross-firm Working Group* teams throughout the year
- As a key GLOBE & Allies priority for FY10, we have taken a leadership role as the overall *PMO Chair and facilitator* this inaugural year

## Key Issues to be worked this year

- *Return on Investment: Defining the LGBT-value Imperative*
- *Legislation and Regulation: A Collective Voice on LGBT Workplace Policy*
- *National-level LGBT Accounting Group: What Brings Four Fierce Competitors Together?*
- *The New Glass Ceiling: Raising the Roof for Rising LGBT Leaders*

## Next steps

- Initiative Teams to meet and formulate strategy
- Monthly Conference Calls with PMO



North Central region  
GLOBE & Allies  
leadership model

## North Central region offices

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Michigan (includes Detroit, Grand Rapids, Ann Arbor, Midland)

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Columbus

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Cleveland

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Cincinnati

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Dayton

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Louisville

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Indianapolis

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Harrisburg

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Pittsburgh

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Buffalo

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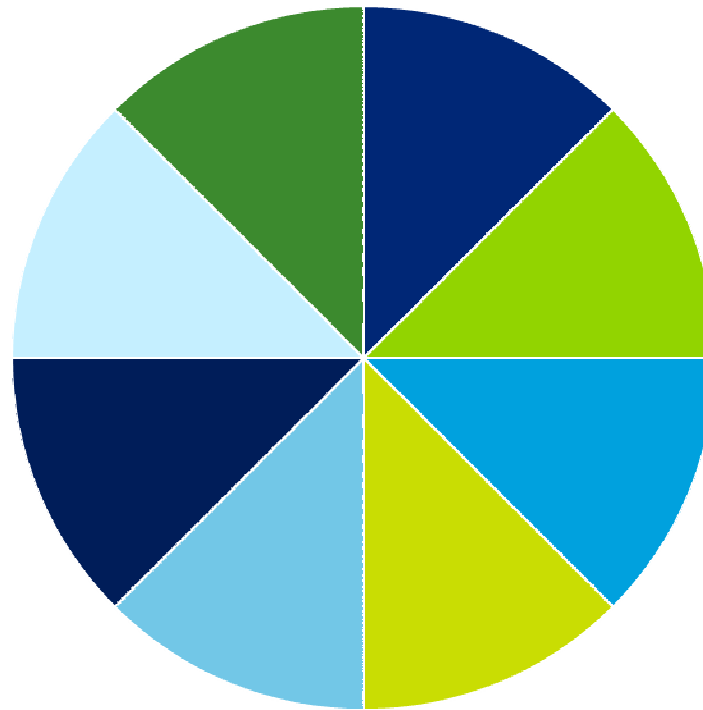
Rochester

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What's key to good leadership?



# Demographics of the FY11 NC GLOBE & Allies group



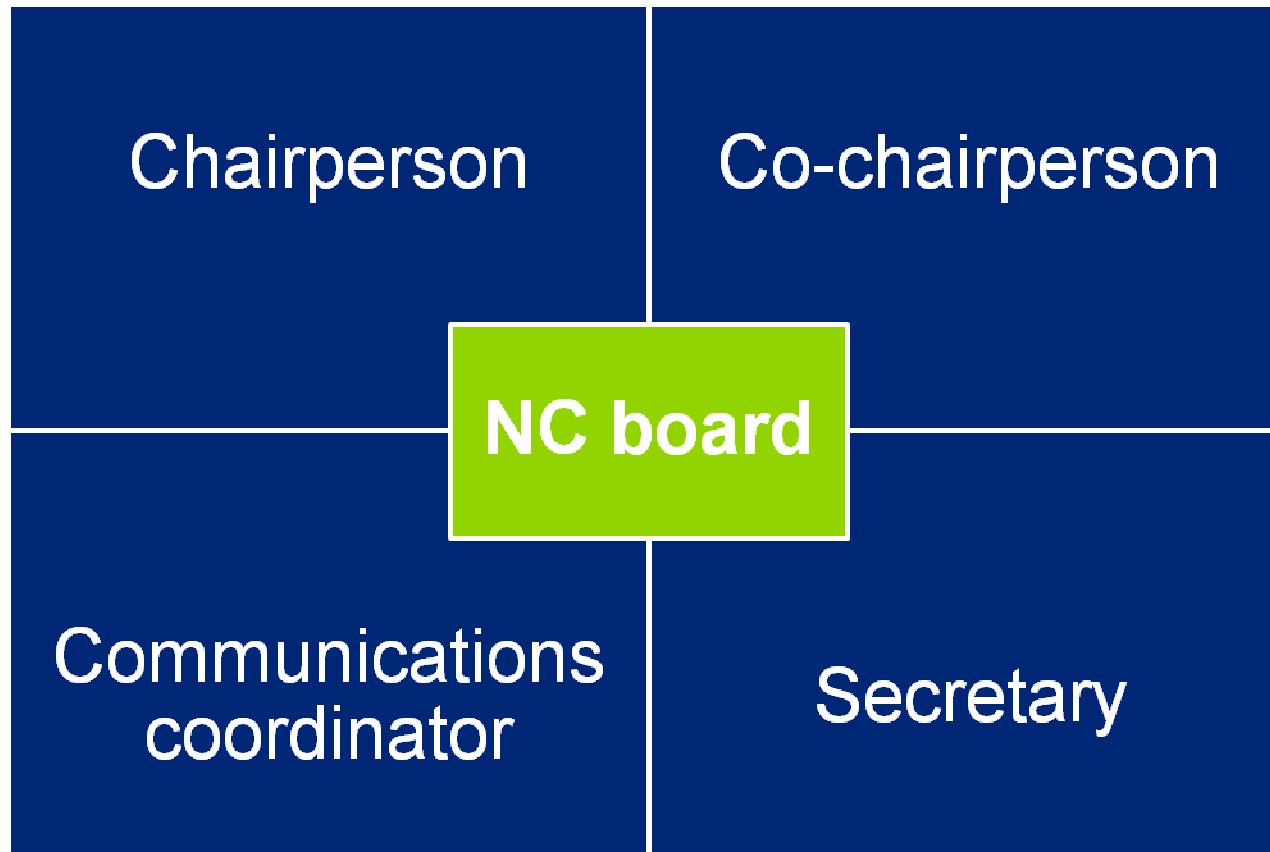
- Multi-generational
- Multi-orientation
- Single, single parents, married parents
- Multi-level
- Multi-gender
- Multi-ethnic
- Multi-functional
- Multi-location

How do we attempt to tap each of those demographics?

## By setting up a leadership model

- With diverse representation
  - Multi gender, generational, orientation, location, level, function, etc.
- Reflective of the broader membership
- Understands and tailors events to various target groups

## NC GLOBE & Allies board positions



# Importance of sponsor/supporter at executive level

**Key to getting group's initiatives advanced at the right level**

**Key to exposure needed for approval by upper management**

**Key to gaining recognition for those members/leaders who put in extraordinary effort**

# Importance of Ally participation on board

**Differing perspective on how to best present initiatives/activities**

**More effective communication outreach**

**Ability to dispel myths and promote acceptance from “within”**

# Importance of “Grass Roots” champions

Each office in region assigned a local champion

- Champion serves as a contact for leaders to funnel through
- Local “face” of the group
- Provide energy needed at the “grass roots” level for lasting impact of the group

# Importance of project assignment

## Right mix of people

- Based on functions, skill set, requirements of specific project, etc.

## Early planning and delegation

- Assign various tasks based on above

## Importance of internally publicizing group

Continually promote awareness: who we are, what we do

Event recaps, officer elections, advertise upcoming events

D&I accolades or accomplishments

Include links to local contacts, email box, other articles, intranet site, etc.

## NC GLOBE & Allies committees

NC GLOBE & Allies has formed three committees to align our efforts with the national D&I Initiatives and to continue to build awareness of and participation in GLOBE & Allies within our region

Committee	Focus
Campus initiatives (Talent/Pipeline)	<ul style="list-style-type: none"><li>• NC Region GLOBE &amp; Allies strives to be a recognized collaborator within the recruiting process through active and engaged participation</li></ul>
Local office events (Inclusive environment)	<ul style="list-style-type: none"><li>• To create a medium where local office events/ideas can be discussed and best practices shared amongst offices within the NC region</li></ul>
Marketplace (brand eminence)	<ul style="list-style-type: none"><li>• To provide a central regional resource for guidance and leading practices to improve Deloitte's brand eminence within the local markets of the North Central region, focusing on LGBT corporate, community service, and Pride organizations and events</li></ul>

# North Central region GLOBE & Allies programming

# Think nationally, act locally

## Semi-annual meetings

- Update group on local, regional, and national events
- Live/media component
  - Guest speaker (PFLAG, etc)
  - Documentary (LOGO's "Out on the Job")
- Time for brainstorming
- Typically held via videoconference (due to budget constraints)

# Think nationally, act locally

## Various offices

- Sponsor Breakfast or Social Events within the office
- Participate in Deloitte national initiatives
- Film Screening of “Milk”
- Impact Day GLBT specific projects
- Participating in Campus Recruiting events
- Cross BRG panel discussion — “Breaking Barriers”
- Internal poster campaign (“I see myself at Deloitte...”)
- Presentation to local leadership (partner/director groups)

## Indianapolis

- Out and Equal Regional Affiliate
- Indianapolis GLBT Film Festival
- Midwest GLBT College Conference
- Indiana Youth Group service project
- Lambda Legal Dinner
- “Out in Corporate America” panel discussion at Indiana University
- Sponsored booth at Pride Festival

# Think nationally, act locally

## **Cleveland**

- Cleveland AIDS Walk with Office jeans Day Fund Raiser
- Cleveland HRC Dinner
- Meeting with local companies to share GLOBE & Allies BRG structure
- Participate in Gay Games committee activities
- Cross-company networking event hosted by GLBT BRGs

## **Pittsburgh**

- GLBT Professional Networking Roundtable
- Campus event-panel discussion

## **Michigan**

- Metro Detroit Big 4 Roundtable
- University of Michigan Campus Recruiting
- Support Local LGBT Community Center
- University of Michigan Discussion Panel

## **Columbus**

- Columbus HRC Dinner

Q&A/group discussion

# Group discussion topics — best practices

What has and hasn't worked well for BRGs/ERGs at other companies relating to:

- Effective programming
  - Engaging members from remote locations
  - Engaging ally participation
  - Tailoring to different interests
  - Cross-BRG/ERG events
- Effective leadership structuring
- Effective communication/publication of events

**Deloitte.**