

What Gets Measured Drives – A Look at LGBT Self-Identification



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Panelists:

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SETTING THE STAGE FOR VOLUNTARY LGBT SELF-IDENTIFICATION



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Early Steps

- 1996 – ENDA introduced with no requirement for collecting data if passed
- 2001 - Bank of America (as Meryl Lynch) gave LGBT employees the option of self-identifying in anonymous employee engagement surveys
- 2002 – 2008 – Discussion begins on what Self ID could look like for LGBT employees
- 2011+ - Inclusion of self-id in the Corporate Equality Index



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Community of Practice

- **2008 – Community of Practice (CoP) formed**
 - 80 professionals representing more than 35 U.S. and Canadian employers and nonprofit organizations, including Out & Equal Workplace Advocates and HRC Foundation
 - Currently 227 members
 - Can join at <https://lgbtselfid.groupsites.com/main/summary>
- **2009 – CoP Report: Where are our LGBT Employees? published**
 - <http://outandequal.org/documents/LGBTSelfIdentificationReport.pdf>
- **2009 – today: Presentations to companies & conferences**
 - Inclusion as part of Corporate Equality Index
 - Increasing number of companies who are doing LGBT Voluntary Self ID
 - Most begin with using engagement/satisfaction survey questions
 - Using HR Records provides better insights in LGBT retention and advancement
 - Companies working together to provide best practices and implementation



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Self ID Report Baselines

- Discussed Self ID Methods
 - Anonymous engagement surveys
 - Confidential employee records
- Proposed planning for
 - Legal Considerations
 - Types of Questions
 - Phased Approach
 - Opt in/Opt out (voluntary)
 - Privacy/Confidentiality
 - Communications
- Theorized that LGBT self ID data
 - Would improve workplace climate
 - Provide metrics for management/HR



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Willingness to Self-Identify as LGBT

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

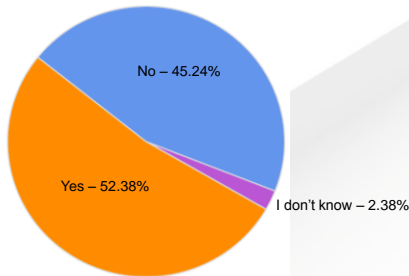
Source: Degrees of Equality Study, HRC, 2009



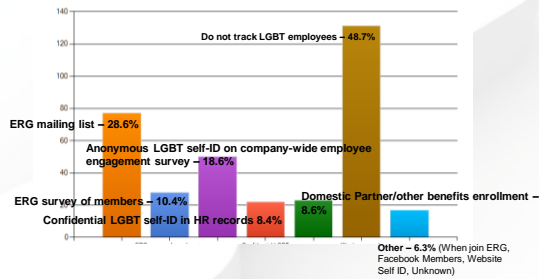
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Is your company doing LGBT Voluntary Self ID work (any method that tracks LGBT employees in the workplace)?



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



Where are we now

- 2013 CEI showed 44% of companies (302) report survey or HR records self ID
- Next steps for companies:
 - Implementation of a self id plan
 - What the data is showing
 - What steps are being taken to address LGBT Self ID data

Getting Started

- How did the discussion start about doing self ID at Group Health?
 - ERG/BRG
 - Management
 - HR
 - Competitive sector pressure
 - Information from the Summit

Self ID Possibilities

- Expand LGBT Ally ID work
- Inclusion of LGBT related questions in purchased survey packages
- Expand the business case to implement and use LGBT Self ID data on a global basis
- Increase emphasis on Corporate Equality Index scores
- Connecting companies to mentor implementation of Self ID companies
- Develop trend and research data reports on findings from surveys



WHAT DO WE KNOW ABOUT TRANSGENDER WORKPLACE ISSUES

How many people are trans?

- 3.5% of adult Americans or about 700,000 people self-identify as transgender



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Source: Gary J. Gates, How many people are lesbian, gay, bisexual, and transgender? Williams Institute (2011) – provided by NCTE
GroupHealth

National Transgender Discrimination Survey

- 50% have been harassed for being trans
- 26% lost a job
- 23% denied a promotion
- 22% denied appropriate restroom use
- 48% breach of confidentiality
- 45% intentional, repeated misuse of pronoun
- 71% hid their gender or gender transition
- 90% were mistreated, discriminated against, or hid who they are to avoid it

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Injustice at Every Turn: A Report of the National Transgender Discrimination Survey, NCTE & National Gay and Lesbian Task Force, 2011
GroupHealth

EEOC's position

- When an employer discriminates against someone because the person is transgender, the employer has engaged in disparate treatment *because of sex*.
- This is true regardless of whether an employer discriminates
 - because the individual has expressed his or her gender in a non-stereotypical fashion,
 - because the employer is uncomfortable with the fact that the person has transitioned or is in the process of transitioning, or
 - because the employer simply does not like that the person is identifying as a transgender person.

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Source: Mia Macy v. Eric Holder, EEOC Appeal No. 0120120821 (April 20, 2012).
GroupHealth

Fortune 500 policies

- 50% have gender identity in EEO policy
- 19% have inclusive health benefits
- ?% have transition guidelines
 - 33% of 636 in Corporate Equality Index

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Source: HRC Corporate Equality Index 2012 – provided by NCTE
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Self-ID issues

- Ability to self-ID as employee's identified gender as well as ID as transgender
- Ability to self-ID gender identity separate from sexual orientation
- Ability to compare FTM, MTF, and other trans employees
- Ability to compare trans with non-trans LGB employees
- Ability to compare trans employees with others of same gender

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Planning & Implementation

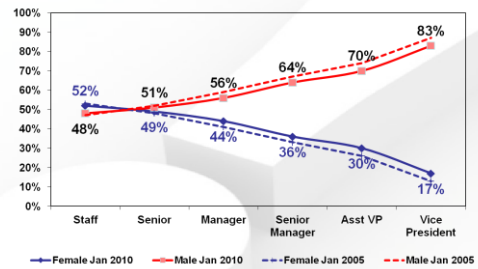
- What were the process and steps you followed?
- Were there barriers or concerns and if so, how did you address these issues?
- How long did it take to get the program up and running?
- How do you gather self ID information now and were there any changes you made after the initial data gathering?

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LET'S SEE HOW IMPLEMENTATION IS GOING

Closing the traditional male/female gap



Current Self ID Companies

- HR Systems
 - Booz Allen Hamilton
 - Ernst & Young (Canada and UK)
 - IBM
 - KPMG (Canada and possibly US)
 - Marsh & McLennan Companies
 - PricewaterhouseCoopers
 - Group Health Cooperative
- Survey data – many companies have been doing this for years and it is now included as demographics on the Corporate Equality Index (CEI) in 2012 (Federal Viewpoint Survey 2012 included a question on LGBT self-identification)

Current Perspectives

- What have you found so far?
 - What was the plan for the data before gathered?
 - Did that change after you viewed the data?
- What's been the action you have taken?
 - What changes have you made based on the data?
 - What's next steps for self ID in your company?

Summary

- Insights
 - What advice would you give a company just starting out on the path to utilizing self ID data?
 - What are the next steps or your hopes for Group Health and LGBT Self ID?

Questions & Answers





Closing Comments

Additional training on Lesbian, Gay, Bisexual & Transgender Issues in the Workplace is available through Out & Equal Workplace Advocates
An Out & Equal™ Diversity Program

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www.outandequal.org