

Leading Through Inclusion

LGBTQA inclusion in the workplace

Cleveland Cultural Competency

Agenda

- ▶ Introductions
- ▶ The business case for LGBTQA inclusion
- ▶ LGBTQA 101
 - ▶ Terminology of sexual orientation and gender identity/expression
 - ▶ Potential workplace challenges for LGBTQA employees
- ▶ Getting it started
 - ▶ Organizations supporting LGBTQA workplace inclusion
 - ▶ Corporate Equality Index
- ▶ Taking it local - Plexus

Eric Lutzo from Forward Thought & Plexus

- ▶ Co-founder and President of Plexus, the NEO Chamber of Commerce for the LGBT community and its allies
- ▶ Founder and principal of Forward Thought, a coaching and leadership development practice specializing in developing leadership skills for individuals and teams
- ▶ Founder and principal of SoTre Properties, a real estate development firm with a focus on purchase, rehabilitation and holding of properties in South Tremont



- ▶ Eric is an avid runner and cyclist as well as a student of yoga and meditation. He enjoys down time with his partner Sean and his dogs Max and Baxter. Eric has also circled the world and enjoys applying his travel experiences to practice.

Chris Crespo from Ernst & Young

- ▶ Started at EY 21 years ago
 - ▶ Inclusiveness Director and lead Beyond, our LGBTQA network
 - ▶ Board of Director for TrueChild and National Gay & Lesbian Chamber of Commerce
 - ▶ Active in Pgh Corp Roundtable and Out & Equal Workplace Advocates
 - ▶ Live on a farm in western PA with my partner of 25 years, 11 year-old triplets, and animals
- ▶ Ernst & Young is a global leader in assurance, tax, transaction and advisory services. Worldwide, our 135,000 people are united by our shared values and an unwavering commitment to quality. We make a difference by helping our people, our clients and our wider communities achieve their potential.
 - ▶ Beyond is our Americas lesbian, gay, bisexual, transgender and allies network with a mailing list of over 1,600 people in 90 locations.
 - ▶ For more information, please visit www.ey.com or www.ey.com/us/beyond



Tell us about your weekend?

- ▶ Find someone by you that you don't know
- ▶ Take 2 minutes to
 - ▶ Introduce yourselves to each other, and
 - ▶ Share something with the other person about what you did this weekend

Business case for competitive advantage

- ▶ Competition for talent in our market
 - ▶ LGBT makes up 4% -10% of the workforce
 - ▶ Affecting 70% of people
- ▶ Productivity improvements of up to 30%
- ▶ Retention costs and impact on remaining workforce
- ▶ Clients' demands for diverse teams and need for complex solutions to their business problems
- ▶ Business relationships providing personal and business development opportunities
- ▶ Alignment with our EY values and purpose
- ▶ Leadership visibility from Awards and Recognitions

Why focus on LGBTQA inclusion?

- ▶ Lack of legal employment protection in many states
- ▶ Unique challenges
 - ▶ “Invisible” minority – role models and clients
 - ▶ Always reading between the lines to ascertain safety zones and level of trust
 - ▶ Lack of support system
 - ▶ Individual professional networks & development
- ▶ Affects non-LGBTQA and LGBTQA people

Show Video

Basic terms and language

- ▶ LGBTQA or GLBT is fine – no right or wrong
- ▶ Sexual Orientation
 - ▶ Gay
 - ▶ Lesbian
 - ▶ Bisexual
- ▶ Gender and Transgender
 - ▶ Gender identity
 - ▶ Gender expression
- ▶ Allies

FAQs

- ▶ What about
 - ▶ Sexual preference?
 - ▶ Queer?
- ▶ How do I ask someone if they are gay?
- ▶ What do I call a significant other?

Gender identity, gender expression and sexual orientation

Female



Male

Feminine



Masculine

Attracted to men



Attracted to women

Workplace situations

- ▶ Working with uncomfortable teammates
- ▶ Working with clients with less inclusive environments
- ▶ Religious views
- ▶ Traveling or relocation
- ▶ Coming out

	External Study	Beyond Survey
Outside the workplace		81%
▶ With close friends	92%	
▶ With family	68% - 78%	
At work	66%	
▶ Generally		55%
▶ With colleagues		59%
▶ With your manager		63%

Micro inequities – death by a thousand paper cuts

...part pop psychology, part human-resources jargon, the term micro inequities puts a name on all the indirect offenses that can demoralize a talented employee.

Time Magazine 15 March 2006

...a subtle message, sometimes subconscious, that devalues, discourages and ultimately impairs performance in the workplace.

DiversityInc 22 May 2003

Micro inequities

- ▶ That is so gay!
- ▶ I'm not rooming with a gay guy!
- ▶ But she doesn't look gay . . .
- ▶ Are the children "yours"?
- ▶ Who doesn't like sports?
- ▶ Blood donation limitations
- ▶ You are such a great guy, I have the perfect girlfriend for you!
- ▶ Gay lifestyle, sexual preference, homosexual agenda, and family values
- ▶ Requests to support Boy Scout events

Getting Started

- ▶ Review current policies and processes to align LGBTQA inclusion efforts with other efforts
- ▶ Leverage employee passion with an employee resource group
- ▶ Identify committed leadership sponsors
- ▶ Determine your vision and plan for executing
- ▶ Get others involved and get it started!
- ▶ Use resources supporting LGBTQA inclusion
 - ▶ LGBTQA organizations
 - ▶ LGBTQA workplace criteria/measures

What are you focused on?

- ▶ What outcomes do you want?
- ▶ What policies do you have and not have?
- ▶ What people might you leverage?
 - ▶ For an Executive Sponsor role
 - ▶ For grassroots development
 - ▶ To learn from
- ▶ What internal departments/processes might work together on it?

US support of LGBT workplace efforts

- ▶ **Out & Equal Workplace Advocates**
 - ▶ Annual summit this year being held in Orlando, October 6-9
 - ▶ 15 steps to an Out & Equal Workplace
 - ▶ www.outandequal.org
- ▶ **National Gay & Lesbian Chamber of Commerce**
 - ▶ Connecting LGBT-owned businesses with corporate partners
 - ▶ Connecting local chambers of commerce
 - ▶ www.nglcc.org
- ▶ **Human Rights Campaign**
 - ▶ LGBT civil rights organization in the US
 - ▶ Corporate Equality Index
 - ▶ www.hrc.org

HRC Corporate Equality Index

▶ About the Index

- ▶ Started in 2002 with 13 companies achieving a 100% rating
- ▶ 260 companies received the 100% rating for 2009 (48% of those reporting) and up from 195 in 2008

▶ The criteria as of 2006:

- Non-discrimination policy, diversity training — sexual orientation
- Non-discrimination policy, diversity training & benefits — gender identity or expression
- Same-sex partner benefits
- LGBT employee resource group / diversity council
- Positively engages the external LGBT community
- Employer exhibits responsible behavior toward the LGBT community; does not engage in action that would undermine LGBT equality

Measuring up

- ▶ Ernst & Young's first 100%
 - ▶ 2005 and needing gender identity and expression protections
- ▶ Changes for 2012 (survey completed in 2011)
 - ▶ www.hrc.org/issues/cei_criteria_new.html
 - ▶ Criteria changes
 - ▶ Transgender benefits coverage
 - ▶ Measure of engagement in LGBT community and training
 - ▶ LGBT included in supplier diversity
 - ▶ Support of advocacy efforts
 - ▶ Measurement of LGBT feedback and diversity goals
 - ▶ Collaborating with others to understand changes

Local workplaces

- ▶ 23 of fortune 1000 in NEO
- ▶ 4 ranked in HRC Corporate Equality Index for 2009
- ▶ 2 received 100 %
 - ▶ Key Bank, Progressive
- ▶ 183 firms in Prior to 2007 multiple corporations (E&Y, BofA, Amex) with regional offices in NEO lead the LGBT workplace equality transition
 - ▶ Employee connection
 - ▶ policy change and workplace acceptance
- ▶ Small business changing policies
 - ▶ Struggling with offering domestic partner benefits

About Plexus

- ▶ **Mission:**

- ▶ To provide proactive business development for the LGBT community and allies

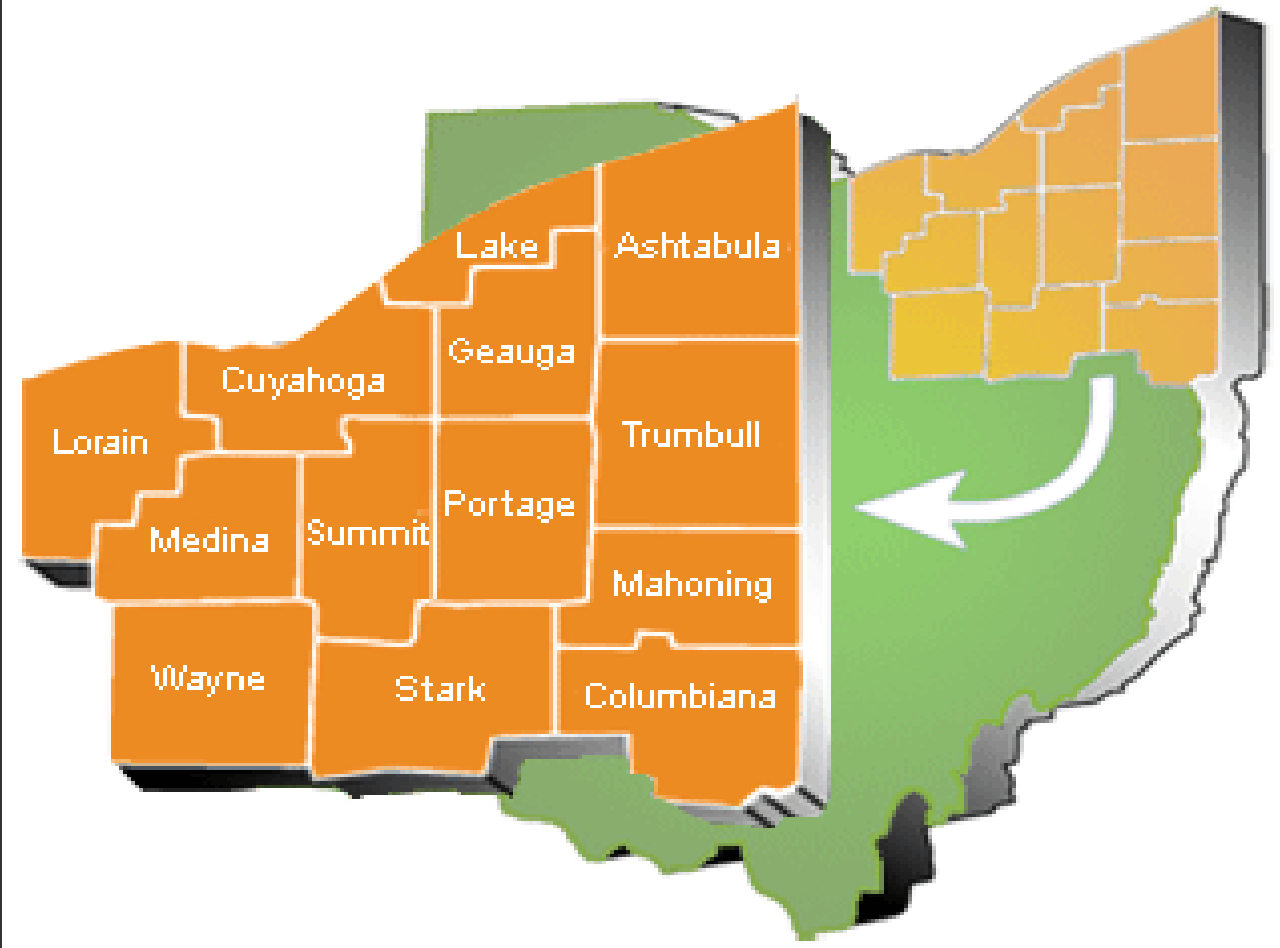
- ▶ **Core Values:**

- ▶ Small business development
- ▶ Promote Workplace Equality

Background

- ▶ **Incorporated 501c6 - June 2006**
- ▶ **NGLCC affiliate - June 2006**
- ▶ **Elected board - October 2006**
- ▶ **Open for membership – June 2007**
- ▶ **Civic Innovation Lab grant - April 2007**
- ▶ **Incorporate 501c3 – December 2008**

Plexus Service Area



Where Plexus is going

Educational Foundation 501c3

- ▶ Public Education
- ▶ Leadership Series
- ▶ Outreach
- ▶ LGBT Institute
- ▶ Scholarship
- ▶ Research
- ▶ Survey's
- ▶ Model Policies
- ▶ Newsletter
 - ▶ Big Picture, What's Happening

Chamber of Commerce 501c6

- ▶ Membership Organization
- ▶ Benefits
 - ▶ Tradeshows
 - ▶ Networking
 - ▶ Directory
 - ▶ Roundtables
 - ▶ Supplier Diversity
- ▶ Training
 - ▶ ERG
 - ▶ small business development
- ▶ Newsletter
 - ▶ HOW TO, task orientated

Regional Benefits

- ▶ Regional partnerships
 - ▶ Fund for Our Economic Future
 - ▶ Municipalities
- ▶ Targeted outreach
 - ▶ Corporate HR and Diversity Professional on the topics of Workplace inclusion
- ▶ Targeted MOU's with Municipalities, Corporations and Organizations
 - ▶ Supplier Diversity
 - ▶ Enhancing Gay Certified companies opportunities

Better for Plexus Better for you

- ▶ Sponsorship
 - ▶ Allowing Plexus to continue it's work
 - ▶ Providing visibility of your support of the LGBT community
- ▶ Contacts
 - ▶ Attracting additional sponsors
 - ▶ Helping you partner with other businesses
- ▶ Committee/Board members and speakers
 - ▶ Growing our capacity to offer programming
 - ▶ Providing professional development and networking opportunities for your people

In conclusion

- ▶ Competitive advantage to have an inclusive culture
- ▶ Business case – this is good for your customers/clients, your people and your business
- ▶ Improving Northeast Ohio's performance on the Corporate Equality Index
- ▶ Plexus can help you locally while you help Plexus



Better together?

Absolutely! Our differences are what energize our culture at Ernst & Young. That's why it's important to us to support our lesbian, gay, bisexual, and transgender people and allies—creating an environment where everyone can bring their whole selves to work. We believe that achieving our potential as a firm begins with helping our people realize their potential as individuals. It makes all the difference to our success.

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What's next?
ey.com

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Quality In Everything We Do