Global Toolkit for Change:

Assessing LGBTQI+ Inclusion in Your Workplace

Introduction:
A Changing Landscape for Business

Around the world, the state of equality for the LGBTQI+ community is in rapid flux, from great advancements to severe setbacks. For businesses, these changes pose both opportunities and challenges.

In the last five years alone:

- Six countries, including the second most populous in the world, India, have struck down their LGBTQI+ criminalization statutes;

- A full 91 percent of the Fortune 500 have gender identity protections enumerated in their nondiscrimination policies (up from 3 percent in 2002).[1]

- The number of countries with marriage equality has risen to 31;[2] and,

- Global acceptance of the LGBTQI+ community has steadily risen in over 130 countries, across three decades, as measured by social surveys.[3]

Global LGBTQI+ Progress

Legal Changes

Decriminalization

- There are 124 United Nations member States (64 of UN member states) where consensual same-sex sexual acts between adults are legal. Sixty-nine UN member states still criminalize consensual same-sex sexual acts between adults.[4]

- Belize (2016), India (2018), Trinidad and Tobago (2018), Botswana (2019), Gabon (2020), and Angola (2021) are some of the most recent countries to decriminalize same-sex sex.[5]

- Most countries in Latin America have decriminalized same-sex sexual relations between consenting adults. There are nine countries, mostly in the Caribbean, who still have laws criminalizing same-sex sex.[6] The majority of these laws are colonial-era relics imposed by countries such as the United Kingdom.

Marriage Equality

- Thirty-one countries have adopted marriage equality legislation: Argentina, Australia, Austria, Belgium, Brazil, Canada, Chile, Colombia, Costa Rica, Denmark, Ecuador, Finland, France, Germany, Iceland, Ireland, Luxembourg, Malta, Mexico, the Netherlands, New Zealand, Norway, Portugal, South Africa, Spain, Sweden, Switzerland, Taiwan, the United Kingdom, the United States of America and Uruguay.[7]

Anti-Discrimination

- Twelve countries around the world have constitutional protection against discrimination based on sexual orientation: Bolivia, Cuba, Ecuador,

In the same stretch of time, attacks on the community, including in the form of legislation, social discrimination, and violence have prevented more progress.

- In 2021, 375 transgender people were killed around the world, according to documented cases, the highest amount of violence against gender diverse people since official recording efforts began;[8]

- In the United States, hundreds of anti-LGBTQI+ bills have been introduced at the state-level, with 2021 nearly doubling the amount of bills from 2020;[9]

- 58% of transgender students in India drop out of high school, greatly reducing their economic opportunities later in life.[10]

- Eastern Europe has seen several regressions in LGBTQI+ rights, such as legislation in Hungary banning information in schools seen as promoting LGBTQI+ equality and the implementation of "LGBT-ideology free zones" in Poland.[11]

Fiji, Kosovo, Malta, Mexico, Nepal, Portugal, San Marino, Sweden, and South Africa.[12]

- Many other countries such as Australia, Brazil, Canada, Angola, and Peru have broad protections against sexual orientation-based discrimination.[13]

- Brazil criminalized homophobia and transphobia through a Supreme Court ruling in 2019.[14]

Transgender Rights

- In 2012, Argentina was the first country to allow transgender individuals to legally change their name and gender marker without facing barriers such as hormone therapy, surgery, or psychiatric diagnosis.[15] Since then, other countries such as Australia, Belgium, Botswana, Brazil, Canada, Chile, Colombia, Costa Rica, Denmark, France, Greece, India, Ireland, Luxembourg, Malta, Pakistan, Portugal, South Africa, have adopted similar laws.[16]

- Argentina, Austria, Australia, Belgium, Canada, Denmark, Germany, Iceland, India, The Netherlands, Nepal, New Zealand, Pakistan, Taiwan, Thailand, the United Kingdom, the United States (21 States and Washington DC), and Uruguay mandated that all national identity cards and passports can have a gender-neutral option.[17]

Social Changes

- The average levels of acceptance for LGBTQI+ people and their rights have increased globally since 1981.[18]

- There have been openly LGBTQI+ politicians elected and/or appointed to government offices in Aruba, Argentina, Australia, Austria, Belgium, Bolivia, Brazil, Canada, Colombia, Costa Rica, Cuba, Chile, Croatia, Czech Republic, Denmark, Ecuador, El Salvador, Faroe Islands, Finland, France, Germany, Greece, Guam, Guatemala, Hong Kong, Hungary, Iceland, India, Ireland, Isle of Man, Israel, Italy, Japan, Latvia, Lithuania, Luxembourg, Macau, Mexico, Nepal, Netherlands, New Zealand, Norway, Peru, Philippines, Poland, Portugal, Serbia, Slovakia, Spain, Sri Lanka, Sweden, South Africa, Switzerland, Taiwan, Thailand, Tunisia, the United Kingdom, the United States, Uruguay, and Venezuela.[19]

Global Market Changes

In many parts of the world, however, the business community has forged progress well ahead of legal and social changes.

Fortune 500: Nondiscrimination Policies & Benefits (2022)[20]

- 93% include sexual orientation protections
- 91% include gender identity protections
  - > 68% extend these protections globally
- 67% offer trans-inclusive health coverage

2022 marks 7th year of LGBTQI+ issues as part of the agenda at Davos (World Economic Forum).

In 2018, 32 major corporations and NGOs joined Out & Equal in the "Statement in Support of Diversity, Respect, and Inclusion for LGBT+ People in the Workplace in Brazil."[21]

87% of participants of the 2021 IBM LGBT+ Jam believe that their organization should take a more assertive public position on LGBT+ inclusion and belonging.[22]

The business community is therefore best poised to leverage the momentum for LGBTQI+ equality when and where it happens and this same community needs support in how they effectively navigate the broad challenges to LGBTQI+ equality.

Many leading multinationals have fully integrated LGBTQI+ inclusion efforts into their strategic business models and are in the second and even third decade of these efforts. They have established a clear and compelling business case for LGBTQI+ inclusion beyond the moral or rights framework. LGBTQI+ workplace inclusion is central attracting and retaining top talent and market share, and more broadly is a bellwether for innovation and forward movement.

From small to mid and large-sized businesses, employers that recognize the LGBTQI+ community will be more profitable, more likely to attract and retain talented employees, and more innovative as the market changes and LGBTQI+ people as well as their friends and family come to expect inclusive products and advertising.[23]

Over recent years, more people and companies are increasing genuine efforts toward greater openness and inclusivity, but the path to achieving diversity, equity and inclusion is sometimes unclear. In this guide, we take what we know from decades of work with global employers and apply these lessons to a flexible self-evaluation tool for a range of businesses.

Getting Started

In this toolkit, we demystify and make accessible both the tried-and-true best practices in LGBTQI+ inclusion from major global and regional employers as well as feature emerging new practices for businesses. In partnership, we move beyond checklists and evolve to flexible tools of individual empowerment and organizational change. Finally, we support employers in assessing gaps between policy and culture.

A business can have supportive policies in place but still lose talent and customers to a culture that does not align with the policies on paper. On the other hand, some businesses have very inclusive cultures but find themselves needing to solidify these values into policies. Change is rarely linear and for businesses today, navigating the path of LGBTQI+ inclusion requires a multidimensional view to understand the totality of the route, avoid possible obstacles, and even find a few shortcuts. Welcome to the next level of advancing inclusion and assessing your workplace!

FOUR TIPS FOR USING THIS TOOL:

1. Carefully read and thoughtfully consider the content in all three components of this toolkit.

2. Tally your results from each section and write them down. Highlight them in red, yellow or green, according to the indications.

3. Take time to consider your cumulative score and what it means in terms of next steps.

4. Share your confidential results with our team to help you reach the next level of LGBTQI+ inclusion.

Toolkit Components

This toolkit has three key components:

1 *Equality as a Matter of Policy:* An overview of foundational policies, benefits and protocols needed as a baseline to ensure workplace inclusion that you can use as a measure against your company's current policies.

2 *Building and Sustaining an Inclusive Culture:* An explanation of practices that support culture change within a company to be utilized as a reference and benchmarking tool for the practices within your company. This section includes two categories of practices: internal and external.

3 *Everyday Experiences of Inclusion Efforts:* These are reflective questions to assess the impact that culture and Diversity, Equity, and Inclusion (DEI) practices and policies have on employees. This is where you are able to gain perspective into any existing gaps in policy and culture practices versus the day-to-day realities across your workforce.

This toolkit is not intended to establish a publicly shared inclusion score. Instead, it is intended as a tool for continuous learning, evaluation and improvement. In fact, due to the individualized nature of the third section of this tool, *Everyday Experiences of Inclusion Efforts*, results may vary based on who is completing the evaluation—and that is part of the value of this tool. This feature allows you to identify potential differences in the lived experiences and perspectives across the business.

Descriptions of how to evaluate your scores for each component are included at the end of each section, and details on how to assess your cumulative scores and suggestions for next steps are included in the final section of this toolkit.

We encourage you to share your confidential results with us and utilize us as a resource to advance your company's DEI initiatives. We also encourage you to use this tool across departments and seniority levels to gain a well-rounded perspective, and to monitor progress by continually measuring success over time.

Component 1

Equality as a Matter of Policy

As important as culture is within an organization, an inclusive culture alone cannot provide clear, tangible expectations of inclusion and non-discrimination, nor can an inclusive culture pay for healthcare or retirement. This is why, for example, the majority of the Fortune 500 have implemented clear non-discrimination policies and extended benefits plans to ensure equality among LGBTQI+ and non-LGBTQI+ workers.

Prospective and current employees need to know that they will not be fired or denied a job or a promotion because of their sexual orientation or gender identity. All employees need to understand the expectations of equal treatment in the workplace and understand that there is accountability and recourse should these policies be violated.

The "What" and the Essentials

1. Non-discrimination Protections

a. What is it?

i. Non-discrimination protections codified into the employer's policies assure job applicants and employees that they will be treated equally and that their identity as an LGBTQI+ person will not be a liability on the job. Some countries do not recognize protections for LGBTQI+ people, but even when national or local law prohibits discrimination in the workplace, it is still important to have a company's own policy reflect its commitment to non-discrimination. This clarity supports the recruitment and retention of talent as well as the workforce's understanding of expectations. Employers should not assume that employees are familiar with the law and need to take their own steps to communicate their policies and processes to address violations of non-discrimination policy.

b. What are the essentials?

i. **Terminology:** The terminology of "sex", "sexual orientation" and "gender identity" should be specifically named as protected categories. Intersex should be a covered category under nondiscrimination provisions that prohibit discrimination on the basis of sex. (For more information on intersex workplace inclusion, click here.) Some businesses also opt to include "gender expression."

ii. **Communication:** The policy is communicated both publicly (e.g. on websites, job applications, etc.) and readily available internally (e.g. on the intranet, posted on boards in the worksite, and found in the employee manual).

iii. **Training and education:** The employer provides specific training on the policy to all new employees and managers with regular refresh opportunities to the entire workforce.

iv. **Reporting violations:** The employer has a clear process to investigate and address any violations of the policy, including anti-retaliation policies.

The "What" and the Essentials

2. Partner and Family Benefits

a. What is it?

i. Partner and family benefits refer to the availability of any employer-provided benefits, including healthcare coverage, parental leave, family benefits including adoption, surrogacy, and fertility treatments, retirement, product discounts, and more to the employee or the unmarried partner of an employee, including in places that do not legally recognize marriage equality. These can include employees in either same or different gender relationships. When looking at the total compensation package for any employee, benefits may account for upwards of 20% to 30% as employees receive healthcare options, paid leave and financial retirement options. If a business extends these benefits to married couples but not unmarried partners, that employer may be viewed as violating the central tenet of equal pay for equal work across its employee base. The proportion of people who are getting married is going down in many countries across the world[24] and only 31 countries recognize marriage equality. Therefore, it is even more crucial that businesses meet this reality to ensure they do not lose talent.

b. What are the essentials?

i. **Equal benefits:** LGBTQI+ employees often face unique barriers to partner and family benefits. Equal and inclusive benefits should be offered to married spouses, LGBTQI+ couples, single parents, and unmarried partners.

ii. **Documentation:** Creating fair and equal standards for documentation of relationship status. In other words, not compelling same-gender partners to furnish proof of commingled finances, duration of relationship or other documents that are not asked of married couples. Employer-provided affidavits can provide protection against fraud which is possible for both married and unmarried couples.

The "What" and the Essentials

3. Inclusive Healthcare Coverage

a. What is it?

i. Transgender and intersex-inclusive healthcare coverage refers to a business's own insurance coverage and paid medical leave as covering employees and—if applicable—their dependents in receiving transition or ongoing care as a transgender or intersex person. Many healthcare insurance plans still include discriminatory exclusions that are not based on sound medical opinion, denying transgender and intersex people vital healthcare coverage. It's incumbent on the employer to work with their insurance provider or administrator to ensure these exclusions are removed and affirmative coverage is included.

b. What are the essentials?

i. Examining current materials: Examine the insurance materials, namely the coverage options for individuals wishing to undergo gender affirmation surgery and follow-up care for intersex individuals like revisions of earlier surgeries or hormonal replacement therapy. In addition, examine exclusions for coverage that may not be eligible for coverage or reimbursement—some may even name transgender or intersex people as excluded for certain coverage options.

ii. Advocate for coverage: Work with the insurance provider or administrator to adopt guidelines of coverage for medically supported transition-related care and ongoing treatments such as hormone therapies, surgical procedures, and more.

Note: If the employer does not extend medical coverage to employees or their family members, then do not count this section in your final score.

The "What" and the Essentials

4. LGBTQI+ Inclusion in Supplier Diversity Programs

a. What is it?

i. Businesses of all sizes enjoy a great amount of choice and power when deciding on their own supply chain—from family-owned restaurants selecting food vendors to huge multinational firms contracting with accounting firms. Many large businesses allot selected percentages and financial spend to vendors and contractors majority-owned by traditionally marginalized groups in business (e.g. women, persons with disabilities and more). Increasingly, businesses are adding LGBTQI+-owned businesses to their diverse supply chain initiatives. This is a winning strategy for all involved—businesses source diverse, talented vendors and the LGBTQI+ business owners continue to grow their financial reach. These relationships also give the contracting business authentic connections to the local LGBTQI+ business community which in turn enhances their openness to the market and future profitable business services and products.

b. What are the essentials?

i. Intersectionality: Include LGBTQI+-owned businesses in supplier diversity programs along with other marginalized identity groups (i.e. Black-owned, women-owned, disability-owned, etc.).

ii. Establish a baseline and future goals: An established baseline determines the current diversity among your suppliers, as well as the amount paid to each. From here, you can set focus targets, goals, and monitor progress.

iii. Mechanisms and resources for identifying and contracting diverse suppliers is likely an important piece of these programs. Finding LGBTQI+-owned or LGBTQI+-friendly vendors can be challenging, but

with the right tools such as robust supplier databases and community partnerships, you will have a wider reach to forge partnerships with diverse suppliers.

iv. An added bonus is pipeline, incentive, or development programs for suppliers. Your company may offer incentive or development programs to LGBTQI+ suppliers so that they can continue to succeed and remain a valuable part of your company's chain, as well as grow and develop new business opportunities for themselves.

5. Workplace Gender Transition Guidelines

a. What is it?

i. These guidelines are for the company's transgender and gender non-conforming employees and/or clients, their coworkers, managers, HR leaders, and anyone else involved in the employee's transition process. They are a set of guidelines and policies that establish best practices to best support and protect transgender employees throughout their transition.

ii. There is no one way to transition. Some changes may include gender expression, gender-affirming surgery, changes to one's gender on official identification documents, name changes, pronoun changes, etc. It is important to note that some trans and nonbinary employees will opt never make any of these changes, while others might wait until they feel it is more safe to do so. In any case, a culture and policy of respect should be in place.

The "What" and the Essentials

b. What are the essentials?

i. **Confidentiality:** An individual's transgender status is considered confidential and should only be disclosed as needed and only with the individual's consent.

ii. **Internal documents:** If an employer's policy requires that all employees use their full legal name and gender on all internal documents, it should consider revising the policy to accommodate employees who use their chosen names.

iii. **Name and legal gender change protocols:** Whether an employee legally changes their name or chooses to go by a name other than their legal name, there are compliance considerations for each situation. Tax and Revenue institutions often require an employee's legal name to be on official documents; however, companies should have their own internal systems for recognizing and using a person's chosen name within internal servers, email addresses, and payroll records. Internal addendums can also be attached to any official documentation that requires a legal name to be listed.

iv. **Equal treatment:** Anyone can legally change their name–they can use a nickname or preferred name or change their name after a divorce or upon marriage. However, trans people face enormous legal barriers in different parts of the world to change their name and gender. With a name change protocol, your company is ensuring equal treatment among your employees. This includes using their chosen name in email addresses, business cards, nameplates, identification badges, intranet and company directory, etc.

v. **Employers should not require any documents or proof** to support a trans or nonbinary employee's request for a name change or change to their gender marker in the company's internal systems.

6. Inclusive Dress Code

a. What is it?

i. A dress code is a set of workplace appearance guidelines. The purpose of company attire policies is not to enforce gendered attire for employees, but rather to ensure that they are dressed in whatever the company deems as professional and functional wear.

ii. All employees should feel comfortable how they present in the workplace regardless of gender identity, race, religion, culture, or disability.

b. What are the essentials?

i. Make explicit that every employee can wear the attire they feel most comfortable with, provided it is safe, functional, and appropriate for the workplace.

ii. Inclusive language is key. Simple changes in language can ensure that certain attire is appropriate without using gendered language (dictating different articles of clothing for men and women) or other lenses of bias (such as not allowing for religious or cultural expressions of attire and hair). One example of neutral and inclusive language is: "Business casual attire is required for external meetings with clients or prospects. Employees should use discretion on other occasions and are expected to demonstrate good judgment." Additional clauses can be added to ensure inclusivity and leave no room for misinterpretations, such as clarification that the dress code "will not be used to discriminate against any employee on the basis of gender identity, sexual orientation, sex, race, ethnicity, religion, disability or any other aspect of an individual's identity."

The "What" and the Essentials

7. Gender Neutral Facilities

a. What is it?

    i.   Gender neutral facilities, such as restrooms or locker rooms, create safer and more comfortable circumstances for transgender and nonbinary employees. By eliminating facilities that are gendered male and female, trans and nonbinary employees are freed from having to make decisions about their gender identity that do not reflect their internal sense of self. Gender neutral facilities also help protect these employees from facing discrimination or harassment.

b. What are the essentials?

    i.   **Restrooms:** Organizations should determine if there are opportunities to create gender neutral restrooms in the office building. For example, if offices have single person male and female restrooms, they can be converted into all gender restrooms.

    ii.   **Locker rooms:** Depending on the nature of the work, employees may need access to a locker room during the workday. Organizations should look into opportunities to create single person changing rooms or gender-neutral locker rooms that still maintain appropriate privacy while also prioritizing safety and comfortability for all employees.

Evaluation of Component 1: Equality as a Matter of Policy

RED

Your company has **three or less** of the above seven policies that contribute to an inclusive workplace.

More inclusive policies are needed to guarantee a safe workplace for LGBTQI+ employees. Some basic protections may be lacking.

YELLOW

Your company has **four to six** of the above seven policies that contribute to an inclusive workplace.

There is still room for improvement when it comes to ensuring a safe and welcoming workplace for all. Basic level protections may be in place, but more policies are needed to fully sustain an inclusive workplace for LGBTQI+ employees.

GREEN

Your company has **all seven** of the above policies that contribute to an inclusive workplace.

Both basic and more advanced-level policies are in place to create a workplace where all LGBTQI+ people belong and thrive. Continue to stay afloat of best practices and policies.

Component 2

Building and Sustaining an Inclusive Culture

Moving beyond putting pen to paper in the implementation of inclusive workplace policies, another key factor of full inclusion is internal and external practices toward building and sustaining cultures of inclusion and belonging. LGBTQI+ and ally employees need to feel that they can bring their authentic selves to work without fear of discrimination or social isolation. This is key not only in cultivating a more productive and innovative workforce, but also for the mental and emotional wellbeing of employees.

Measuring how inclusive a culture is can be a difficult task. The practices below outline some of the best and emerging practices in creating cultures of inclusion.

Note: It is important to collaborate with local leaders and LGBTQI+-led organizational partners in each country that your company has employees. In some countries with punitive legislation against LGBTQI+ people, or with hostile social environments, some of the following practices, such as a Self-ID campaign, would be much more complicated to implement. In that case, you may omit that section from your final score.

The "What" and the Essentials

Part 1: Internal Practices

1. Employee Resource Groups, Affinity Groups and/or Business Resource Groups

a. What is it?

    i. Employee Resource Groups (ERGs), Affinity Groups, and Business Resource Groups (BRGs) are voluntary employee-led groups with the ultimate objective of fostering a sense of community and diversity and inclusion within their company. ERGs are typically led by and composed of employees who share a common identity, special interest, or life experience (i.e. LGBTQI+, race and/or ethnicity, veteran status, women, people with disabilities, parents, etc.).

    ii. These formal structures offer a community of support, safe spaces, and initiatives toward greater workplace inclusion. Allies can also be invited to join an LGBTQI+ ERG.

b. What are the essentials?

    i. Official company recognition as a formalized workplace organization.

    ii. A direct line to company leadership or an Executive Sponsor is a useful aspect of an ERG structure that ensures access to leadership.

    iii. A budget, usually determined by the D&I or HR department to carry out activities and programs.

    iv. A mission statement and goal(s) for the ERG is necessary to maintain focus and track progress.

    v. Internal structure. For example, the group might have rotating Chairs, Chapter Leads, etc.

vi. Various city, country and/or regional chapters, depending on the size of the company and age of the ERG. Global or Regional Co-Leads can help to track progress, maintain cross-regional connections, and implement "glocalized," or global to local, programming and initiatives.

The "What" and the Essentials

2. Inclusive and Targeted Recruiting Efforts

a. What is it?

i. Inclusive recruiting refers to how an employer takes steps to communicate their LGBTQI+ inclusion policies and programs in their job opportunity postings, presence and materials at job or career fairs, and across all talent recruitment efforts. Targeted recruitment efforts are very common for businesses seeking to ensure a diverse, talented workforce. These efforts include posting career opportunities on LGBTQI+ listservs or websites, having booths or other presence at LGBTQI+ professional conferences.

b. What are the essentials?

i. **Inclusive job descriptions:** Clearly defined role, transparent expectations, benefits available, and the use of inclusive language (or neutral language, if applicable, like languages such as [Spanish](#) and [Portuguese](#)).

ii. **Diverse applicant pool:** Attracting top talent means a diversified approach to where an employer posts their job postings, namely across listserv and media outlets targeted at LGBTQI+ people, women, persons with disabilities and more. Using general websites such as LinkedIn, job postings can include language or symbolism to reflect their commitment to diversity and inclusion broadly, with specific mention of LGBTQI+ diversity.

iii. **Inclusive application process:** Some key components here are simple, transparent job applications with clear instructions, inclusive interview processes such as cross-departmental interviews and flexible and supportive measures for people with disabilities or neurodivergent individuals. In addition, application materials should allow for optional pronouns, any prior names, and chosen names which sends clear signals that diversity is welcomed and that LGBTQI+ folks are not unfairly discouraged from applying.

The "What" and the Essentials

3. Self-ID

a. What is it?

i. LGBTQI+ data collection efforts—more commonly known as "self-identification" or "self-ID"—shine light on diverse identities that may otherwise be invisible in the workplace. Since sexual orientation and gender identity are not typically visible characteristics in the workplace, self-identification is especially important for LGBTQI+ employees.

ii. Self-ID allows employers to understand the size of their LGBTQI+ workforce, observe patterns in LGBTQI+ representation across the organization, and meaningfully track progress towards key inclusion goals. It can also improve the employer's abilities to analyze and respond to employee needs, identify where greater investment or attention may be needed, connect LGBTQI+ employees to professional development opportunities, and more.

iii. An organization's self-ID program sends two messages to employees:

1) LGBTQI+ inclusion is a company priority.

2) LGBTQI+ identity is recognized on the same level as demographic groups already captured in internal surveys and records.

b. What are the essentials?

i. Deciding the method of data collection: The first step in implementing a self-ID program is to determine the method of the data collection. Two primary methods of collecting LGBTQI+ self-identification data are through anonymous engagement surveys and/or confidential employee records. Organizational engagement surveys are typically anonymous and can include optional demographic questions on sexual orientation

and gender identity (SOGI) as a part of a larger set of demographic questions. Existing Human Resource Information Systems (HRIS) provide opportunities for employees to voluntarily report sexual orientation and gender identity demographic information.

ii. **Communication strategy:** LGBTQI+ self-ID data is particularly sensitive, therefore, self-ID initiatives should be accompanied by robust communication strategies that clearly explain why the data is being collected, where it will be stored and protected, who will have access, and how the information will be used.

iii. **Asking the appropriate questions:** It is important to use careful and clear wording when drafting questions to gather self-identification data, explaining key terms where applicable. The phrasing of a self-ID question has significant influence over the value of the data collected since insensitive or unclear language can discourage someone from disclosing their identity or potentially cause an employee to incorrectly self-identify. To ensure trust and encourage disclosure, employers should proactively communicate the purpose for the self-ID questions and emphasize confidentiality of the data to address any fears or concerns. Questions collecting this demographic information should be entirely optional and employers should practice transparency by informing employees about the purpose of the questions and how the data will be used.

The "What" and the Essentials

4. LGBTQI+ Inclusion and Educational Trainings

a. What is it?

i. Workplace inclusion training is a key component to creating cultures of belonging at work. They establish expectations toward policies and cultures of nondiscrimination. They also provide educational information about diversity and inclusion in order to fortify employees' understanding of DEI and cultivate empathy. In the case of LGBTQI+ inclusion, the concepts of sexual orientation, gender identity, and the overall rapid evolution of language related to the community makes it worthy of unique content. Many employees want to be respectful and inclusive but lack foundational knowledge to do so.

b. What are the essentials?

i. All workplace inclusion trainings, such as general workplace conduct trainings, DEI employee trainings, and manager trainings, should be LGBTQI+-inclusive and preferably be developed in collaboration with trusted community partners.

ii. Free resources: Employers should offer and promote free educational initiatives such as informational resources, inclusion guides and toolkits, educational webinars, workshops, conferences, etc.

iii. Incentives: Some ally educational and awareness programs offer incentives for employees to continue their learning beyond a baseline level by offering different level badges for employees to display on the intranet or on their desk as a visible marker of allyship.

iv. A safe space is a crucial foundation for learning and relatability. Educational initiatives can foster a safe space for learning by laying out participation guidelines, respect for others' learning journeys, and a moderator or curator who can potentially step in to resolve any issues that may arise.

5. DEI-focused Mentorship Program or Reverse Mentorship Program

a. What is it?

i. A mentorship or reverse mentorship program is a structured, often one-on-one, relationship in a work setting aimed at creating opportunities for historically excluded groups, such as LGBTQI+ people, to gain access to career education, a professional support system, hands-on mentorship from industry leaders, and network growth.

ii. Reverse mentoring pairs younger employees with executives to mentor them on fresh perspectives on various topics, including the value of DEI initiatives, driving culture change, inclusive leadership, and exchanging digital skills such as social media marketing.

iii. By design, both types of programs are aimed at creating equitable opportunities for career development and promote cultures of belonging in the workplace.

b. What are the essentials?

i. Strategic planning and organization: This includes a thoughtful and strategic mission statement for the program and specific, tangible DEI goals (i.e. "increase LGBTQI+ representation in managerial positions by 15% in 3 years").

ii. Intentional recruitment and training of mentors and mentees that equip both parties with expectations, structure, and goals.

iii. Data and metrics should be collected from the program in order to measure effectiveness.

The "What" and the Essentials

Part 2: External Practices

1. External Community Partnerships and Engagement

a. What is it?

    i.   External community partnerships and engagement is the process of building collaborative relationships with LGBTQI+ organizations (nonprofits and NGOs) affiliated by a special interest or issue. Community partnerships are an important tool in combining and mobilizing resources to influence change and achieve desired goals.

    ii.   Organizations that are able to recognize the power of their influence are able to strategically identify the ways a specific issue (i.e. LGBTQI+, women's issues, racial justice, etc.) intersects with their own business interests.

b. What are the essentials?

    i.   **Fostering relationships:** Organizations should focus on fostering strong, collaborative relationships with external community partner organizations and community members so they can better understand their market and more efficiently meet their needs.

    ii.   **Defining purpose:** Defining a purpose of the partnership and establishing strategic goals leads to more successful external engagement with tangible, positive outcomes. It is important to identify the key stakeholders within the partnership and create specific roles for each person involved in the work.

    iii.   **Establishing a budget:** A crucial aspect of entering community partnerships is determining an annual budget for the partnership, respective of your organization's overall budget. Many community partnerships will require a certain amount of annual donation depending on partnership level and what the partnership is working to accomplish over the year.

The "What" and the Essentials

2. Philanthropy and Public Advocacy

a. What is it?

i. Organizational philanthropy is when an organization donates their time, resources, and/or money to a charitable cause that will help improve communities and support advocacy work that an organization or group focuses on.

ii. Organizations have a responsibility to a range of stakeholders—their employees, shareholders, customers, local communities in which they operate, etc.—to constantly innovate and increase their value, which cannot realistically be achieved within an organization's own operations. Just as businesses impact political, economic, social, and environmental trends, so too do these forces directly impact business. It is at this intersection that organizations cultivate their public advocacy positions.

b. What are the essentials?

i. Determine purpose: Determine your organization's reason for advocating for LGBTQI+ issues. Companies should consider how this intersects with their business values and how it affects their employees, stakeholders, suppliers, and the community at large.

ii. Assess internal position: When beginning your organization's philanthropy and public advocacy journey, assess the organization's track record and previous stances on LGBTQI+ issues and decide if there is internal work that needs to be focused on first or in tandem with external advocacy. How has the organization established its own position before promoting LGBTQI+ equality externally?

The "What" and the Essentials

3. Inclusive Marketing Efforts

a. What is it?

i   Inclusive marketing involves creating content that speaks to specific diverse communities and reflects the community's values, unique needs, and interests. Marketing efforts include multi-media advertisements, social media promotions, events, fundraisers, and more.

ii. LGBTQI+-focused inclusive marketing efforts attempt to eliminate exclusion that the LGBTQI+ community has historically experienced and helps members of the community feel seen and valued as consumers.

b. What are the essentials?

i.   **Target audience:** In developing an inclusive marketing strategy, it's critical that the organization focuses on the target audience. Determining the appropriate audience for the marketing campaign will ensure the messaging is reaching the desired group of consumers.

ii. **Setting goals:** Determining what the organization is attempting to achieve through the marketing efforts is key in the process of creating an inclusive campaign. Is the goal to bring in more LGBTQI+ customers? Recruit LGBTQI+ employees? Recognize and celebrate the community? Establishing the goals of the campaign will help guide the messaging and content.

iii. **Establishing a budget:** Successful marketing efforts will require monetary investments from the organization. Organizations should work within the appropriate channels to create the budget for the campaign based on overall goals.

Evaluation of Component 2: Building and Sustaining an Inclusive Culture

RED

Your company has **three or less** of the combined eight internal and external practices that contribute to an inclusive culture.

More inclusive culture practices and protocols are needed to guarantee a safe workplace for LGBTQI+ employees. Some basic internal and/or external practices may not be in effect.

YELLOW

Your company has **four to seven** of the combined eight internal and external practices that contribute to an inclusive culture.

There is still room for improvement when it comes to ensuring an inclusive workplace culture. Based on your result, basic practices may be in place but more is needed either internally and/or externally to foster a healthy culture of belonging.

GREEN

Your company has **all eight** of the internal practices and external practices that contribute to an inclusive culture.

Both basic and more advanced-level internal and external practices are in place to create a workplace culture where all LGBTQI+ people belong and thrive. Continue to stay afloat of best practices and policies.

Component 3

Everyday Experiences of Inclusion Efforts

This section is meant to be reflective and individual to each employee who completes this mini survey. To that point, it is helpful to have a diverse range of employees complete this section to identify possible gaps between policies, programs, and inclusive culture practices versus the day-to-day realities for employees. A data set that encompasses a cross-section of employees will allow for a comprehensive overview of experiences and trends across different identities, roles, and/or geographies. From senior executives to mid-level managers to entry level employees, these questions translate to concrete indicators of when and how concerted LGBTQI+ inclusion efforts are successful and where there is still significant room to improve.
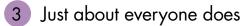
To best support your organization in distributing this survey and easily quantifying responses, we are happy to provide you with this **downloadable template**. Using this template with automated formulas not only makes counting the score for this section easier, but more importantly, it ensures your company's confidential ownership of the survey, as well as the ability to add optional demographic questions if you wish to collect that data as well.

Component 3 Survey

1. At this workplace, everyone knows what the non-discrimination policy is and what it means for LGBTQI+ employees.

   1 No, few people do

   2 Many but not all do

   3 Just about everyone does

2. I know that if I experience or witness discrimination, my concerns will be taken seriously and will be properly addressed.

   1 I doubt it

   2 I may be heard but I am not confident the behavior would be addressed

   3 I am confident that the behavior will be addressed and my concerns will be heard

3. Jokes or negative comments about LGBTQI+ people are common around this workplace.

   1 Yes

   2 Sometimes

   3 Never or rarely

4. I have heard our business's leaders speak proudly about the LGBTQI+ workforce and/or the company's inclusion efforts for this community.
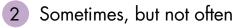
   1 Never or rarely

   2 Sometimes, but not often

   3 More often than not

5. I don't have to hide who I am at work as an LGBTQI+ person or as an ally.

   (1) I generally have to hide that part of myself

   (2) Sometimes I have to hide my identity to get by at work

   (3) I generally do not feel I need to hide who I am at work

6. At this company, LGBTQI+ employees are generally:

   A. Respected

   (1) Never or rarely

   (2) Sometimes

   (3) More often than not

   B. Visible

   (1) Never or rarely

   (2) Sometimes

   (3) More often than not

   C. Found across different roles and levels

   (1) Never or rarely

   (2) Somewhat but tend to be in select roles

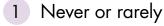   (3) Often found at all levels, including leadership

Note: When tabulating your cumulative score, please count your average score across parts A, B, and C as your final score for question 6. If you are using the [downloadable template](#)*, this will be properly automatically calculated as such.*
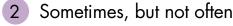
7. How frequently do you hear colleagues share their gender pronouns? This can include practices such as introducing themselves with their pronouns in meetings and adding their pronouns to email signatures.
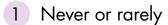
    1 Never or rarely

    2 Sometimes, but not often

    3 More often than not

8. Anyone applying for a job or in the hiring process, would know that we are LGBTQI+ inclusive.

    1 Never or rarely

    2 Sometimes, if the applicant asked

    3 Most likely—our inclusive values would be specifically communicated

9. Do you feel represented in your company's public profile and branding, including marketing and advertising?

    1 Never or rarely

    2 Sometimes, but not often

    3 More often than not

10. I would recommend and encourage a member of the LGBTQI+ community or strong ally to join my company.

    1 No

    2 Maybe, depending on their role or what team they join

    3 Definitely

11. Transgender and nonbinary employees and/or customers have safe and respectful access to appropriate facilities.

- 1 Never or rarely
- 2 Sometimes, but not often
- 3 More often than not

12. Leaders at this company make clear that LGBTQI+ inclusion is part of our business strategy for success.
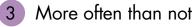
- 1 Never or rarely
- 2 Sometimes, but not often
- 3 More often than not

13. LGBTQI+ people here have access to professional development opportunities and mentors as anyone else does.

- 1 Never or rarely
- 2 Sometimes, but not often
- 3 More often than not

14. I am encouraged to connect with local LGBTQI+ organizations for partnerships, advice, or events.

- 1 Never or rarely
- 2 Sometimes, but not often
- 3 More often than not

15. This business values and prioritizes relationships with LGBTQI+-owned businesses in our supply chain and contract initiatives.

- 1 Never or rarely
- 2 Sometimes, but not often
- 3 More often than not

Evaluation of Component 3: Everyday Impact of Inclusion Efforts

At the end of the survey, every employee who finished the survey will Add up the numerical value of each of your responses to obtain the sum total. This number should range anywhere from 15-45.

RED

Your total score is 15-24.

The lived realities of employees at work do not reflect a culture of belonging. The workplace may feel anywhere from hostile and unsafe, to unwelcoming and restrictive.

YELLOW

Your total score is 25-35.

There may be pockets of resistance to full inclusion and/or inconsistencies in how the workforce understands and embodies LGBTQI+ diversity and inclusion.

GREEN

Your total score is 36-45.

Employees' experiences at work are generally positive, they are able to be themselves and see the values of LGBTQI+ inclusion reflected and embraced across many layers of the company and its leadership.

Assessing Your Cumulative Scores to Achieve a Holistic View of LGBTQI+ Workplace Inclusion

Now that you've completed each part of this *LGBTQI+ Inclusion Toolkit*, you'll want to look comparatively across your scores for all three components. How did you score in each of the components— "Equality as a Matter of Policy", "Building and Sustaining an Inclusive Culture", and "Everyday Experiences of Inclusion Efforts"?

Red scores indicate a more urgent need to address a clear gap in inclusion efforts, whereas yellow scores indicate a more nuanced reality. Yellow scores may be indicative of a company that is still mid-journey to becoming more LGBTQI+-inclusive, or perhaps a situation where policies or culture practices do not fully address all aspects of inclusion.

We can measure policies and culture practices quantitatively, but the translation of that to the actual experiences of every employee, across all levels and departments, can be difficult to get a comprehensive view of. For example, what if your company has trans-inclusive healthcare and benefits, yet trans employees experience the day-to-day environment to be not one in which they are comfortable bringing their full selves to work? One of the most valuable practical uses of this toolkit is to compare scores across components in order to identify gaps like this and explore possible solutions. **A few scenarios are explained on the following pages:**

Equality as a Matter of Policy: GREEN

Building and Sustaining an Inclusive Culture: GREEN

Everyday Experiences of Inclusion Efforts: YELLOW

Your company has inclusive policies and protections in place, including many best practices that seek to create a healthy culture of belonging for LGBTQI+ employees. However, efforts may be needed to strengthen effectiveness, or be given more priority by company leadership. This is reflected in the yellow scoring of everyday experiences of employees.

The next step would be to go beyond policy to strengthen and grow inclusive culture practices, both internally and externally, to ensure that employees feel a true sense of belonging at work.

Equality as a Matter of Policy: GREEN

Building and Sustaining an Inclusive Culture: YELLOW

Everyday Experiences of Inclusion Efforts: RED

Your company has all of its inclusive policies and protections in place, but is still lacking some of the best practices toward creating a sustained culture of belonging for LGBTQI+ employees. Related to the lack of culture-supporting practices, the everyday experiences of employees are showing this significant gap between the intention of the policies and the day-to-day workplace culture.

The next step would be to build on your company policies by implementing more best practices, both internal and external, around creating inclusive cultures, while also continuing to grow and develop those already in existence. LGBTQI+ community partners are helpful here if they are not already a part of your company's ecosystem. This should help towards improving the everyday experiences of employees.

Equality as a Matter of Policy: RED

Building and Sustaining an Inclusive Culture: YELLOW

Everyday Experiences of Inclusion Efforts: GREEN

Despite your company not having sufficient LGBTQI+-inclusive policies and the need for fuller inclusion practices, the everyday experience of your employees in terms of inclusion and belonging is very positive.

The next step would be to safeguard and reinforce these experiences by solidifying policies that protect LGBTQI+ employees from discrimination and offer inclusive benefits, as well as continue to develop best practices around culture change.

Whatever set of scores your business has obtained in this self-assessment, you have Out & Equal as an enthusiastic partner in the next steps of your inclusion journey. Rather than publicize ratings, we encourage all businesses, large and small, to submit their participation in this self-assessment to toolkitforchange@outandequal.org. Out & Equal can provide assistance in interpreting cumulative scores as well as tailored consultation as to next steps and future opportunities for partnership and collaboration. Thank you for taking the time to complete this self-assessment and for all that you do to create workplaces where everyone can belong and thrive.

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This resource was developed by Out & Equal, with key contributors:

Deena Fidas, Managing Director & Chief Program and Partnerships Officer, Out & Equal

CV Viverito, Deputy Director of Global Programs & Stakeholder Engagement, Out & Equal

Gabriel de la Cruz Soler, Global Stakeholder Engagement Manager, Out & Equal

Madeline Perrou, Communications Manager, Out & Equal

Corina Hendren, Senior Associate, Global Stakeholder Engagement, Out & Equal

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