LGBTQ+

Workplace Equity Toolkit

Facilitator's Guide

Pride in the Triangle

Pride in the Triangle

Pride in the Triangle (PITT) is a collaboration of Triangle, NC-area LGBTQ+ employees, consultants, and allies from companies in all sectors. We come together to network, share best practices, and advance LGBTQ+ issues in our companies and across North Carolina. We envision a more inclusive and equitable work environment for LGBTQ+ people and are working collaboratively to make that vision a reality.

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LGBTQ+ Workplace Equity Toolkit Facilitator's Guide

This document provides guidance on how to prepare and facilitate training sessions using the LGBTQ+ Workplace Equity Toolkit.

This section explains the Toolkit contents, organization, flow, terminology used throughout the facilitator's guide, and adaptation guidance.

Contents

The Toolkit is comprised of four files:

- Facilitator's Guide with Appendices (this pdf document)
  - o Appendix A: LGBTQ+ Terminology and Definitions - Page 41
  - o Appendix B: Case Studies – Possible Responses - Page 46
  - o Appendix C: Commitments and Action Steps Worksheet - Page 54
- Participant's Guide (pdf document)
- PowerPoint presentation (ppt document; customization required)
- Training and Planning Supporting Documents (Word document to facilitate customization)
  - o How to Engage Leadership and Cultivate Support for LGBTQ+ Workplace Equity Training
  - o Sample Email Invitation to LGBTQ+ Workplace Equity Training
  - o Three sample agendas for three different timeframes
  - o LGBTQ+ Workplace Equity Training Evaluation
  - o Participant Certificate of Completion

Organization

The Toolkit is organized in six sections. There is a color-coded bar at the start of each section that corresponds to the color bar at the top of each slide within that section.

	Red	Introductions, Set Up, and Rationale for This Training
	Orange	Terminology and Concepts
	Yellow	Business Case for LGBTQ+ Workplace Equity
	Green	Unconscious Bias and Solidarity
	Blue	Case Studies
	Purple	Next Steps and Conclusion

At the start of each section is a summary table with the following information:

- **Time**: estimated time frame for covering the section
- **Purpose**: a description of what the section aims to accomplish
- **Advance preparation**: work that the facilitator needs to prepare ahead of the training
- **Materials**: items facilitators need to present the section

- **Facilitator**: a space for facilitators to designate who will lead that portion of the training

Facilitator instructions are organized in the following way:

- **SLIDE: Slide Title**
- *Facilitator Guidance*: provides tips and options for presenting the slide
- *Talking Points*: provides verbatim text that can be said when presenting certain slides. If the slide contains all the necessary text, that is noted in the Facilitator Guidance, and no speaking points are provided
- *Activity Instructions*: provides detailed instructions for group activities and discussions

Facilitators should build in a 10-15 minute break for participants every two hours of instruction.

Adaptation Guidance:

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The Facilitator's Guide and Participant's Guide are distributed in pdf format and are not intended to be adapted. The PowerPoint presentation and Training and Planning Supporting Documents are intended to be customized with organization-specific information. Please cite the source.

When customizing / modifying the PowerPoint presentation:

- The Toolkit License and Citation icon must remain as is on the bottom left corner of the cover page.
- Slide 3 (Appreciation to Toolkit Sponsors), Slide 99 (Meet Your Toolkit Authors) and Slide 100 (Toolkit License and Citation) must remain in the slide deck with no edits.

Pride in the Triangle would like to archive and share adaptations and additional materials created by Toolkit users and can make referrals to training design and facilitation consultants, as needed. Please contact info@prideinthetriangle.org for more information.

Introductions, Set Up, and Rationale

Time	30 minutes
Purpose	The purpose of this section is to: • Welcome participants • Set up the training • Create a conducive learning environment • Review the goal, objectives, and agenda • Establish group agreements and the parking lot for off-topic issues • Introduce the topic, trainers, and participants to each other • Begin to create a positive rapport among trainers and participants • Share the overall rationale for doing this training • Explain why it is important to create a workplace environment in which every employee feels a strong sense of belonging. • Articulate how inclusion and equity are tied to our organization's vision, mission, and values.
Advance preparation	• Place a stack of index cards on every table and prepare a box or basket in which participants can place their anonymous questions • Prepare a brief (2-3 minute) mindfulness or centering exercise. You can find many mindfulness exercises online. (Recommended but optional). • For the introduction slides, facilitator(s) will insert their photo and description. If your audience includes many people who are less familiar with LGBTQ+ issues, you could opt not to include pronouns and ask them to state one item they want to learn about LGBTQ+ workplace equity. • Prepare in advance relevant examples of how LGBTQ+ employees, clients, products, and services are important to your organization. For example, you want LGBTQ+ employees to feel included and valued so they can be productive members of your workforce. You want LGBTQ+ clients to feel valued so they will partner with your company and use your services or buy your products. • Replace the example company statement slides with your organization's vision, mission, values, goals, career development, diversity, equity, and inclusion statements. Include any statements that refer specifically to LGBTQ+ people and communities. Type in bold font the words and phrases that have a strong tie to diversity, equity, and inclusion, which you will emphasize when you present the slides. • Research your company's nondiscrimination policy, and if it includes sexual orientation and gender identity and expression, share it.
Materials	• Slides • Facilitator's guide • Flipchart easel and paper and/or white board • Markers • Group agreements written on a flipchart and ready to post on the wall

	• Parking lot written on a flipchart and ready to post on the wall
	• Index cards
	• Box or basket
	• Masking tape
	• Training toys such as stress balls, modeling clay, and pipe cleaners
Facilitator	

SLIDE: Welcome, Set Up, and Introductions

- Welcome participants to the training.

Facilitator Guidance (recommended but optional):

- Lead a mindfulness exercise. When introducing it, you could explain that many institutions, including navy seals, police departments, nonprofit and for-profit companies, offer mindfulness exercises to their employees to help them become more present, focused, and self aware.

SLIDE: Appreciation to Toolkit Sponsors *(this slide must remain in the slide deck without modification)*

- Recognize the companies that donated funds for the Toolkit development.

SLIDE: Training Goal and Objectives

Facilitator Guidance:

- Ask a participant to read the training goal and objectives out loud.
- Solicit and answer any questions about them.

SLIDE: Training Agenda

Facilitator Guidance:

- Ask a different participant to read the training agenda out loud.
- Solicit and answer any questions about it.
- Explain that there are index cards on each table on which participants can write anonymous questions and drop them in the box or basket. Facilitators will collect them during breaks and address them during the appropriate place in the agenda.
- Explain that there are training toys such as stress balls, modeling clay, and pipe cleaners for participants to hold and manipulate to relieve stress and facilitate concentration for kinesthetic learners (people who learn better while they are carrying out physical activity).
- Inform participants that, at the end of the training, they will select an accountability partner with whom they will check in after the training to hold each other accountable for following through on their commitments and action steps. You may recommend that they select someone they don't know well from a different department to foster team building and organizational advancement in LGBTQ+ inclusion and equity.

SLIDE: Parking Lot

Facilitator Guidance:

- Post a flipchart labeled Parking Lot on the wall and explain to participants that you will write down, and you invite them to add, any items that arise that are not on topic but are important enough to be addressed at a later point.
- Ensure that you review the Parking Lot during breaks and at the end of the training to determine if, how, and when you will address each point listed with participants.

SLIDE: Group Agreements

Facilitator Guidance:

- Explain that whenever we're engaging in a training or group process that may engender strong feelings and disagreement, it's important to put group agreements in place that help create a safe and productive experience for everyone.
- Invite participants to read the group agreements silently to themselves.
- Ask if there are any group agreements they would like you to explain or highlight.
- Ask participants to hold themselves accountable to these group agreements and bring them to the group's attention if they believe they are straying from them.

SLIDE: Introductions: Your Facilitators

Facilitator Guidance:

- Facilitators need to paste their photos and descriptions into the introduction slides in advance.
- Facilitators introduce themselves to participants.

SLIDE: Introductions: Your Turn

Facilitator Guidance:

- Ask participants to introduce themselves with the following information:
    - Name
    - Current pronouns: they/their, she/her, he/his, etc. (optional)
    - Title(s) and company affiliation(s)
    - Familiarity with LGBTQ+ communities
    - Passion or question related to LGBTQ+ equity (in one sentence – remain strict about this to effectively manage time)

- For an audience that includes many people who are less familiar and comfortable with LGBTQ+ communities, you could opt not to include pronouns and ask them to state one item they want to learn about LGBTQ+ workplace equity. May then need to modify the last bullet on this slide.

- Participant introductions may be in pairs, small groups, or the large group depending on the number of participants and time allotted for this section.
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SLIDE: LGBTQ+ History Trivia Mixer

Activity Instructions:

- This is an introductory icebreaker to introduce the topic and begin to create rapport among participants.
- Ask participants to pair up with someone they don't know well, discuss the statements listed on the slide, and determine the correct responses to fill in the blanks.
- Possible variation: If you have time, you can ask one question at a time and ask participants to pair up with a new person each time. This can help create stronger rapport in the group from the onset.

SLIDE: LGBTQ+ History Trivia: Correct Responses

Activity Instructions:

- Provide the correct responses and explanations below.
- Acknowledge the participants with the highest number of correct responses. Reassure participants that some people may not know the correct responses because this information is not part of the dominant culture and therefore is not shared widely in schools or the media.
- Explain that we did this activity partially for fun and partially to raise our awareness that we have more information to learn about LGBTQ+ people and communities.
    - The June 1969 **Stonewall** riots catalyzed the U.S. LGBTQ+ civil rights movement and are the impetus for annual pride celebrations.
        - The Stonewall riots were a series of spontaneous, violent demonstrations by members of the LGBTQ+ community against a police raid that began in the early morning hours of June 28, 1969, at the Stonewall Inn in the Greenwich Village neighborhood of Manhattan, New York City. These riots were a catalyst for the United States LGBTQ+ rights movement. (Wikipedia)
    - The **pink triangle**, originally intended as a badge of shame, was reclaimed by the LGBTQ+ community as a positive symbol of self identity, rights, and pride.
        - The pink triangle was originally intended as a badge of shame in Nazi Germany concentration camps to label prisoners who were identified by the authorities as homosexual or bisexual men and transgender women. In the 1970s, the pink triangle was reclaimed as a symbol of protest against homophobia and has since been adopted by the larger LGBTQ+ community as a popular symbol of self identity, rights, and pride.
    - The first country to legalize same-sex marriage was: **Denmark**.
        - The Danish were the first to grant same-sex unions almost the exact same rights as marriages, with its Registered Partnerships Act of 1989. With a landmark Supreme Court decision on June 26, 2015, the United States became the 17th country to legalize same-sex marriage.
    - The first openly-LGBTQ+ candidate to be elected in the U.S. was: **Kathy Kozachenko**.
        - On April 2, 1974, Kathy Kozachenko, a Human Rights Party candidate, bested a Democrat to become the first openly-LGBTQ+ person to win elected office in the United States (and perhaps worldwide as well) when she won her seat on the Ann Arbor, Michigan City Council.

- Harvey Milk was an American politician and the first openly gay elected official in the history of California, where he was elected to the San Francisco Board of Supervisors in 1977.
- Discuss the common misperception that Harvey Milk was the first openly-gay person elected to office and how sexism has resulted in the public overlooking Kathy Kozachenko's place in history.
  - Inspired by Harvey Milk, Gilbert Baker designed and stitched together this symbol of pride and hope for the LGBTQ+ community in 1978: **rainbow flag**.

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SLIDE: Heart – Mind – Action

Facilitator Guidance: For this slide, you will click through the three points, one at a time, after the slide summary. You will want to prepare in advance and provide relevant examples of how LGBTQ+ employees, clients, products, and services are important to your organization.

Talking Points: In any equity, diversity, and inclusion training like this one (and we will soon provide definitions of these terms), we address three components.

- First, we are appealing to our hearts. Each of us should be able to understand the importance of equity, diversity, and inclusion because of our own desire to work in an environment where we feel valued and respected and able to contribute fully. I hope we can agree on the importance of fair play and equitable treatment for all.
- Second, we are appealing to our minds and logic. This includes understanding the clear and compelling business case for LGBTQ+ workplace equity and how it is critical to the success of our organization and achievement of our goals.
- *Facilitator Guidance:* Provide relevant examples of how LGBTQ+ employees, clients, products, and services are important to your organization. Here are some examples:
  - Share an example of a service or product you sell that may appeal to a large number of LGBTQ+ consumers.
  - A government agency or nonprofit organization can share the need to serve all residents or clients with equal excellent support.
  - Share the example of how LGBTQ+ people and their allies may make major purchasing decisions based on a company's support of LGBTQ+ equality.
- Third, this training should result in action. Our hope is that each person in this training will commit to taking specific steps to support LGBTQ+ equity in our workplace. Knowledge and commitment and knowledge combined with deliberate action will lead to the best results in our jobs and for our organization.
- Ultimately, we know it's important to you to be excellent at your jobs, and this training is designed to create a workplace environment that supports creativity, collaboration, innovation, and excellence.

SLIDE: Naïve Offending

Talking Points: Another construct for our discussion is the concept of being a naïve offender. Naïve offenders can include all of us, at any particular point in time.

- Naïve offenders include all of us, who may unintentionally make an error in some aspect of diversity and inclusion. People may have good intentions but say or do something offensive to their colleagues. Frequently, these missteps come from a lack of knowledge. As we discussed with our group agreements, people can have good intentions, but their words and actions can still have a harmful impact on the recipient.
- Most of us, even if we are fully supportive of all diversity, equity, and inclusion ideals, can still be naïve offenders at times, especially in areas with which we are less familiar.

Facilitator Guidance: You may want to share a brief example of when you were a naïve offender. For example, when a male coworker mentioned his spouse, you may have made a comment that showed that you assumed he was referring to a woman because you did not know he was gay.

SLIDE: Tying to Organizational Vision, Mission, and Values

SLIDE: Careers at Dude Solutions

SLIDE: Diversity, Inclusion, and Belonging at Citrix

SLIDE: Town of Chapel Hill, North Carolina

SLIDE: Town of Chapel Hill – Respect

SLIDE: Support for Gender Identity - RTI

Facilitator Guidance:

- You will replace the example company statement slides with your organization's vision, mission, values, goals, career development, diversity, equity, and inclusion statements. Include any statements that refer specifically to LGBTQ+ people and communities. Type in bold font, or highlight in yellow, the words and phrases that have a strong tie to diversity, equity, and inclusion, and as you present them, clearly make the connections.

SLIDE: Summary and Next Section: Terminology and Concepts

Facilitator Guidance:

- Ask participants to summarize the key points covered in this section. Fill in any missing points.
- Let them know that the next section will explore equity, diversity, inclusion, and LGBTQ+-related terminology and concepts in greater depth.

	Terminology and Concepts
Time	40-50 minutes
Purpose	The purpose of this section is to create a shared understanding of equity, diversity, inclusion, and LGBTQ+-related terms and concepts.
Advance preparation	LGBTQ+ Terminology: Find Your Match Activity terms and definitions • Cut each word and each definition in Appendix A of this Facilitator's Guide separately into paper strips. Keep one copy for your reference. Do not include outdated and potentially offensive terms (in red font).
Materials	• Slides • Facilitator's guide • LGBTQ+ Terminology and Definitions (Appendix A) • Sticky notes
Facilitator	

SLIDE: Terminology and Concepts

SLIDE: Purpose

- Explain the purpose of this section by reading the slide.

SLIDE: Diversity

- Explain the definitions of diversity and a diverse workplace that we will use for this training.

SLIDE: Identity Markers and Characteristics

- Describe the identity markers and characteristics listed on the slide.

SLIDE: Inclusion

- Explain the definition of inclusion that we will use for this training.

SLIDE: Equity

- Explain the definitions of equity and equality that we will use for this training.
  - Give participants time to read the definitions.
  - With equality, everyone gets the same treatment and opportunities. With equity, we take into consideration that some people have faced barriers based on race, ethnicity, gender, and other identities, and we make accommodations to account for them so that everyone has equitable opportunities for advancement.
  - For example, to address the racial leadership gap, an organization might offer employees of color professional development and mentoring opportunities with senior

leaders of color. They may do the same for women to create gender equity in upper leadership.

SLIDE: Moving to Belonging

Facilitator Guidance: This slide progresses through three clicks.

Talking Points:

- The first rationale for LGBTQ+ workplace inclusion is the importance of each person in the workplace feeling that they fully belong.
- The first step is diversity. While difference is a fact of life, diversity may or may not be reflected across our organization in different positions and at different leadership levels.
- The second step is moving to inclusion. In addition to there being diverse people, everyone is at the table, and each person is recognized as being an invaluable member of the team. In reality, people may be present, but they may not be fully respected, valued, or listened to.
- The third and most important step is to foster belonging. It is one thing to be sitting at the table, but another to be feeling that you truly belong on the team.

SLIDE: The Importance of Belonging

Facilitator Guidance: This slide has a second click after the initial information.

Talking Points:

- Many of us may be familiar with Maslow's hierarchy of needs.
- For many of us in this training, our basic physical need for food, water, and shelter are likely met. (This may not be true for everyone).
- Many people in the LGBTQ+ community are living in poverty, and many queer and transgender people of color face harassment and danger in their daily lives, in large part due to discrimination based on sexual orientation, gender identity and expression, and race and ethnicity.
- After physical and safety needs, the next most important need in the hierarchy is belonging and love, such as having intimate relationships and friends. Given the number of waking hours we spend at work, it is crucial for our well being to feel a sense of belonging at work.
- Unfortunately, it is often difficult for people whose identities do not conform with the dominant culture, including LGBTQ+ people, to feel as if they completely belong in their workplace.

Facilitator Guidance: Click and then review the bullets that appear on the right.

Talking Points:

- There is a very real human need for and power in fostering a sense of belonging at work.
- Our fast-changing, diverse, global economy and workforce make the business case for belonging even more critical.
- There are many practical actions we can take to increase employees' sense of belonging in the workplace.

- When a feeling of belonging is absent, people resort to covering, which is when members of the non-dominant culture hide, downplay, or change their identities or aspects of their identities in an attempt to appear to fit in better with the dominant culture.

Facilitator Guidance: If time allows, you can present and discuss the various ways people may cover.

Talking Point: The various ways people cover may include:

- Appearance: intentionally changing self expression, such as dressing in a more traditionally masculine or feminine way.
- Affiliation: avoiding behaviors associated with their identity groups in an attempt to avoid stereotypes.
- Advocacy: being less likely to speak out about topics central to their identities, such as not talking about their support for the LGBTQ+ community.
- Association: intentionally avoiding socializing with other in-group members.

Activity Instructions (optional):

- Divide participants into small groups to discuss or ask a few people in the room to share a particular time when they felt a strong sense of belonging at work and how that impacted their satisfaction and performance in the workplace.

SLIDE: Everyone Needs to Belong

Talking Points:

- Every single person is unique and part of the diversity mix.
- It's important to frame diversity and inclusion discussions as "all of us" versus "us versus them."
- This diversity wheel shows the many different diversity markers we have across four different dimensions:

Facilitator Guidance: Indicate some of the characteristics as you name each dimension.

- o Primary: those attributes with which we are born; immutable characteristics
- o Secondary: those attributes due to how and where we were raised and life choices we made, such as: our education, getting married and having children, joining the military
- o Organizational: diversity based on where we are and longevity in our work organization
- o Cultural: includes items such as our communication style, view of authority, and ways of thinking and processing information that often come into play at work
- Let's pause and think about the various ways we are diverse from our coworkers and the unique insight that gives us are work.
- This training focuses on certain aspects of diversity - namely, our sexual orientation and gender identity and expression, as well as being an ally to LGBTQ+ people.

SLIDE: LGBTQ+ Terminology

Find Your Match Activity Instructions (10-20 minutes): Depending on the amount of time you have, you can conduct this as the activity outlined below or have participants silently read the terms on the slide and write down and submit to the facilitator the terms they want defined.

- Distribute an even number of term and definition paper strips to participants.
- Instruct participants to find their match (the person with the matching term for their definition or definition for their term) and discuss the term and definition. Ask them to submit a sticky note to the facilitator with any term they would like to discuss and clarify in the large group.
- Collect the sticky notes and review those terms and their definitions in the large group.
- Ask participants to identify any other LGBTQ+ terms they would like to define and discuss.
- Add terms and definitions that participants bring up that aren't included in the list.

SLIDE: Proper Versus Outdated and Offensive Terms

Talking Points

- Language continues to evolve at a very fast pace. People adopt new words and concepts, and certain terms that may have been acceptable in the past have become outdated and even potentially offensive.
- This slide shows LGBTQ+ terms that are proper versus those that are outdated and potentially offensive.
- Language is a key place where naïve offenses may occur. For example, many well meaning people may use the term "sexual preference" in reference to lesbian, gay, and bisexual people's sexual orientation. However, that terms can be very hurtful because it connotes that one's sexual orientation (the correct term) is a choice they made and not an inherent characteristic.
- Explain that certain terms may be triggering to some LGBTQ+ people because they evoke painful or traumatic incidents from their past.

SLIDE: Gender and Sexuality

Talking Points:

- **Gender identity** refers to the gender that a person feels they are in their core. This is unique to each person may or may not correspond with their sex assigned at birth or social conventions.
- **Gender expression** is how a person demonstrates their gender through the ways they act, dress, behave, and interact.
- **Biological sex** refers to the objectively measurable organs, hormones, and chromosomes.
- **Sexual orientation** refers to the inherent, immutable, enduring emotional, romantic and/or sexual attraction to other people that may include heterosexual/straight, gay, lesbian, bisexual, asexual, etc.
- All of these are not binary but rather exist along a continuum.

- It is vital to ask people how they identify, avoid making assumptions, and accept their stated identities.
- Many different images have been created to represent gender and sexuality, including TSER's gender unicorn and gender dragon. You can use the one that you believe will be most useful to your audience and setting.

SLIDE: Transgender and Gender Nonbinary

Facilitator Guidance:

- Explain each of the following terms and ask participants to give an example of a celebrity or other well-known trans woman and trans man.
  - **Transgender** is an umbrella term for people whose gender identities, expressions, and/or behaviors are different from those typically associated with people with their assigned sex at birth.
    - There are multiple, acceptable terms for transgender. People may also use the terms gender fluid, gender nonconforming, gender nonbinary, and two spirit (a Native American term).
  - A **trans woman** is someone assigned male at birth who knows herself to be female.
    - Celebrity trans women include Laverne Cox, Caitlyn Jenner, and Janet Mock.
  - A **trans man** is someone assigned female at birth who knows himself to be male.
    - A celebrity trans man is Chas Bono.
  - **Gender transition/transitioning** refers to the process through which a person modifies their physical characteristics and/or legal status and manner of gender expression to be consistent with their (internal) gender identity.
  - **Cisgender** refers to a person whose gender identity is in alignment with their sex assigned at birth; a person who is not transgender.
- Answer any questions participants have about transgender terms and people.

SLIDE: Pronouns

Talking Points:

- Third-person pronouns in English identify a person or something they possess: She/her/hers, they/their/theirs, he, him/his, etc.
- People often make assumptions about a person's gender based on their name, voice, and/or appearance, and their assumptions are not always correct.
- The act of making an assumption, even if it is correct, sends the potentially harmful message that people have to look a certain way to demonstrate their gender.
- Transgender, gender non-conforming, and nonbinary people use pronouns other than those they were assigned at birth.

- Being "misgendered" is disturbing, exhausting, and can even cause intense feelings of dysphoria (a feeling that one's gender identity has been ignored or invalidated and a corresponding discomfort in one's body and mind)
- Using people's correct pronouns is an important and easy way to show respect and caring for each other.
- It's a good idea to model providing your pronouns during introductions. For example, "My name is ____, and my pronouns are ____." If people do not want to offer their pronouns, their wishes should be respected.
  https://studentaffairs.duke.edu/csgd/training-resources/gender-pronouns
- Pronouns, like gender, can be fluid and change over time.
- Many workplaces encourage employees to include their pronouns in their signatures, on their name badges, and in their staff directories and are replacing gendered pronouns with gender-neutral language in job descriptions to avoid gender bias.
- For those who maintain that using singular "they" is incorrect grammar, singular "they" was Merriam Webster dictionary's word of the year for 2019. It is a matter of respect.

SLIDE: "But I don't tell people I'm straight"

Talking Points:

- Some people may question why sexual orientation and gender identity and expression should even be discussed in the workplace. A few of us may have heard the refrain, "I don't go around telling people I'm straight, so why do you need to tell me that you are LGBTQ+?"
- When we think about our daily conversations with coworkers, however, being LGBTQ+ would naturally come up…
  o When people share what they did over the weekend
  o When people discuss their vacation plans
  o When coworkers are discussing employee benefits
  o When people display photos of spouses, children, and other family members in their work spaces
- This is partly what we mean when we talk about creating a welcoming environment where people are free to be their authentic selves and don't feel that they have to cover.

SLIDE: Story Sharing Activity (10 minutes)

Activity Instructions:

- Ask people to pair up with one other person they don't know well to share stories. (If there are an odd number of participants, one group can be with three people or a facilitator can pair up with a participant).
  o Ask participants to think of something they did with one other person last weekend. That person can be a spouse or partner, child, or good friend.
  o Instruct participants to take turns sharing a story for two minutes with the other person. When they each tell their story, without saying the name of the person, they need to switch the person's pronouns. For example, if the person is a woman, they need to use the pronouns they/them/their or he/him/his.

- After two minutes, they will switch, and the other person will tell their story following the same instructions.
- In the large group, ask a few participants to share their experience. Responses may include:
  - It felt odd.
  - It was difficult.
  - I had to concentrate while I talking so I wouldn't say the wrong gender.
  - I felt dishonest, like I was hiding something.
  - It felt fine.
- Close the activity by explaining that if people do not feel safe and accepted at work, they may do something like this to cover having a same-gender partner. They may even avoid social contact with coworkers, such as eating lunch alone. This can cause coworkers to feel suspicious and wonder if the person is trustworthy or is trying to hide something. All of these responses can impact people's satisfaction and performance at work.

SLIDE: **LGBTQ+ People are Diverse**

Talking Points:

- Mainstream media outlets often do not portray LGBTQ+ people in all of their diversity. Sometimes LGBTQ+ people are depicted as mainly white, male, wealthy, from the United States or Western Europe, and working in certain professions such as fashion, design, and acting. However, despite media optics that would have us think otherwise, LGBTQ+ people are incredibly diverse.
- LGBTQ+ people exist across all other identity groups and personality types.
- Some organizations advocate for more accurate representation of LGBTQ+ people in the media because it's important for all people to understand how diverse LGBTQ+ people really are and see themselves portrayed in popular media.

SLIDE: Intersectionality

Facilitator Guidance:

- Introduce intersectionality by naming your primary identities. For example, "I'm a Black, lesbian, Spanish-speaking woman and mother."

Talking Points:

- Intersectionality is a framework for conceptualizing a person, group of people, or social issue that takes into account people's complex, overlapping identities and relative power, privilege, and marginalization to gain a more nuanced understanding of their lived experiences and needs.
- Kimberlé Williams Crenshaw, a civil rights advocate and legal and critical race theory scholar, first coined the concept to describe overlapping or intersecting social identities and related systems of oppression, domination, or discrimination. It is a critical approach to equity, diversity, and inclusion.

- Workplace policies and practices need to take into account employees' intersecting identities and avoid trying to categorize people into distinct groups based on only one of their identities. For example, a Black, lesbian mother with a disability may feel on guard against racism, sexism, and ableism in her workplace, and all of those systems of discrimination could be acting in concert for her. She may need support from several employee resource groups for Black, women, LGBTQ+, parents, and employees with disabilities.

SLIDE: Ally

Talking Points:

- An ally is a person with relative privilege and power who builds trusting relationships and acts in solidarity and with accountability to people and/or groups with marginalized identities without detracting from their power and voices.
- Explain that the photo shows members of PFLAG, the United States' first and largest organization uniting parents, families, and allies with LGBTQ+ people, at an LGBTQ+ Pride Parade.

SLIDE: Summary and Next Section: Business Case

- Ask participants to summarize the section contents and their key takeaway points.
- Transition to the next training section.

Business Case

Time	20-30 minutes
Purpose	The purpose of this section is to: • Provide the reason for this particular focus on the LGBTQ+ communities. • Understand the clear and compelling business case for LGBTQ+ inclusion and equity in the workplace and learn how to articulate it to others.

Advance preparation	• If your organization is international, research whether your policies are global or country specific and whether they are congruent with national law.
	• Determine the approach you want to the business case section - Two options:
	  ○ If there is limited time, you can present just the one summary slide and present some of the points on the subsequent slides. You can chose to include or omit the financial business case slide.
	  ○ Alternatively, you can present the entire module with a slide for each of the main business case arguments. Each of the detailed slides includes an interesting fact that you may want to highlight.
	• The fourth point, Marketing / Sales / Customer Service, has two slides to choose from, one if you are a for-profit company and another if you are a nonprofit or governmental agency.
	• There are two slides with a financial / numeric business case, one if you are a for-profit company and another if you are a nonprofit or governmental agency. You may want to replace the number and do the math for your own organization, or feel free to use the slide as is as an illustrative example.
	• For some of the slides, within the speaking notes, there are interesting facts you may want to share with the slide.

Materials	• Slides • Facilitator's guide
Facilitator	

SLIDE: Purpose

Facilitator Guidance: When you present the cover slide, introduce this section on the rationale and business case for supporting LGBTQ+ workplace equity.

Talking Points:

- There is a strong rationale for focusing on LGBTQ+ diversity, equity and inclusion today. We will go over some of the challenges that LGBTQ+ people face in the workplace
- There is a clear and compelling business case for full inclusion of and equity for LGBTQ+ people in all aspects of any organization's business.
- LGBTQ+ inclusion and equity are the right things to do from a human rights standpoint, and they are also good for business.
- The purpose of this section is:
    - To understand why there is a particular focus on LGBTQ+ people in the workplace.
    - To understand the compelling business case for LGBTQ+ inclusion and equity in the workplace.
    - To be able to articulate the business case to others.

SLIDE: LGBTQ+ People Can be Fired for "No Cause"

Facilitator Guidance: You will need to research your company's nondiscrimination policies and statements to see if they include sexual orientation and/or gender identity and expression and share them with the group. Also, you will need to research if your policies are global or country specific, and if they may even be incongruent with national law.

Talking Points:

- There truly is a rationale why we are having this particular focus today on LGBTQ+ employees.
- The reason many people may not feel free to be out at work is because they could be fired simply for being LGBTQ+.
- There is currently no U.S. federal legislation that provides job protections for LGBTQ+ people as there are for sex, race, religion, etc. In many countries, LGBTQ+ people are not protected from employment discrimination.
- A majority of states (including North Carolina) in the Unites States do not provide LGBTQ+ employee protections. The states in orange and red on this map currently provide no protections based on sexual orientation or gender identity.
- Fortunately, a vast number of companies include nondiscrimination statements around sexual orientation and gender identity, but still there are no legal governmental protections.

SLIDE: Global View of LGBTQ+ Equality (optional)

Facilitator Guidance: If you have global operations outside the US or conduct business outside the US, you may want to include this slide.

Talking Points:

- There is wide variation across the world in terms of how accepting a country's laws and general culture are for LGBTQ+ people. There are many countries where being LGBTQ+ is largely accepted and other countries where being LGBTQ+ is highly stigmatized and even criminalized.
- Being aware of these differences can make you more sensitive when dealing with colleagues, customers, and suppliers in different countries.

SLIDE: Challenges in the Workplace

Talking Points:

- LGBTQ people often face challenges in the workplace that can negatively impact their productivity and well-being.

Facilitator Guidance:

- Read through the bullets on the slide.
- Optionally, you may want to ask participants if they have experienced any of these challenges due to their identities.

SLIDE: Business Case for LGBTQ+ Workplace Equity

Facilitator Guidance: For a very quick summary, you can present this as the only slide and the financial business case slide and cover the talking points. Alternatively, you can present the slides that explain each of the five points in detail. In that case, you simply read through the bullets on the slide and then state that you will go through each in detail.

Talking Points:

- LGBTQ+ equity in organizations matters strategically for five reasons.
- (If you are going to present all of the slides): I will quickly introduce the five reasons and then go into each one in greater depth.

Talking Points: (if you are going to present only this slide for this section)

- Recruiting: We want to recruit the very best person for each position, which means casting the widest possible net for talent, and that includes LGBTQ+ people.
- Retention and performance: It's important to recruit the best candidates, but once they are at the organization, there is the question of whether they will want to stay and contribute their best. If they do not feel welcomed and valued, that influences their satisfaction and quality of work, which in turn affects their decision to stay or leave.
- Diversity of ideas and talent: When people from diverse backgrounds and life experiences bring their full selves to work, they are able to contribute more substantively and creatively.
- Marketing / sales / customer service: (choose one or two of the applicable points below)
  - For profit: We want to maximize our revenues, which means fair treatment of LGBTQ+ consumers

- o Business to business: Even though we do not sell to end users, key decision makers we sell to may be LGBTQ+ or allies who consider our LGBTQ+ inclusion and equity as factors in their procurement decisions
  - o Nonprofit / government: Every resident or client we serve deserves fair and equitable treatment and service
- Social responsibility and community reputation: LGBTQ+ communities may scrutinize our record on LGBTQ+ inclusion and equity and make their purchasing decisions accordingly. Community impressions can also impact marketing and recruiting of employees.

SLIDE: Business Case: Recruiting

Facilitator Guidance: You may want to research where your company stands on these points in advance.

Talking Points:

- A company embracing LGBTQ+ equity in a proactive way is critical to recruiting the best employees because we want to cast the widest possible net for talent.
- Prospective employees carefully examine the types of policies, practices, and benefits a company has and how they treat their LGBTQ+ employees as a litmus test for how inclusive the company really is. This includes benefits that apply equally to same-gender and other-gender spouses and partners, parental and family leave policies, adoption, and gender transition health benefits.
- FACT: 93% of Fortune 500 companies include sexual orientation and 85% include gender identity in their equal opportunity policies. 61% offer domestic partner benefits and 62% offer some form of transgender and transition health benefits. (HRC State of the Workplace, 2019).

SLIDE: Business Case: Retention and Performance

Talking Points:

- The number one reason why people leave a job is negative relationships, and the two most important relationships are with their direct supervisor and coworkers. Managers and coworkers not fully respecting an employee may cause them to resign. Recruiting and onboarding their replacements are costly.
- Too often, LGBTQ+ employees do not feel included and respected among their coworkers.
- Valued and respected employees who feel like they belong will contribute their best.
- FACT: LGBTQ+ people who feel that they totally belong and can be out at work are 20-30% more productive than their closeted counterparts. (Citytowninfo.com survey, 2014)

SLIDE: Business Case: Diversity of Ideas and Talent

Facilitator Guidance:

- Cover the bullet points and make the overall point that all people, including LGBTQ+ people, bringing their full creativity to the table can deliver better business results.
- Ask participants for an example or offer your own of when an LGBTQ+ employee was able to introduce a product or service enhancement to better serve the LGBTQ+ marketplace and how

that benefitted their company. You may need to share some examples (non-LGBTQ+ and LGBTQ). Examples:

- o Ford Motor Company including female engineers with children on the team designing a minivan so they bring their life experience of hauling their children around into the design.
- o Using LGBTQ people to help determine if the structure of a particular offering will meet the needs of same-gender couple. Example – financial services.
- o Intake forms at services organization to include gender-inclusive, transgender and gender non-binary language.

Talking Points:

- FACT: 90% of companies on the HRC Corporate Equality Index have LGTBQ+ employee resource groups and/or LGBTQ+ representation on their diversity council. They often look to these individuals and groups for input on products and services for LGBTQ+ communities. (2019 HRC CEI report)

SLIDES: Business Case: Marketing / Sales / Customer Service (one for for-profit companies and one for nonprofit and governmental agencies).

For-Profit Companies

Facilitator Guidance: If you are a business-to-business (B2B) company - that is, doing business with other businesses instead or of in addition to end consumers, do emphasize the point in the yellow box - that not only do you need to keep end consumers in mind, but also LGBTQ+ and allied decision makers in other companies you do business with.

Talking Points:

- LGBTQ+ consumers do check out companies and vendors when making buying decisions, such as consulting the Human Rights Campaign's annual Buy for Equality guide to see how LGBTQ+-inclusive companies are. Some studies show that LGBTQ+ consumers are the most brand loyal and brand punishing of the various diversity constituencies.
- LGBTQ+ consumers like to see themselves portrayed in advertising.
- LGBTQ+ couples that do not have children (although increasing numbers of same-gender couples are raising children) often have higher discretionary income. They want to see them and their families portrayed by companies with which they do business.
- For companies that do business with the United States' federal government, and many do, former President Barak Obama updated Executive Orders 11478 and 11246 to state that any company that want to do business with the Federal Government must include protections based on sexual orientation and gender identity and expression in their non-discrimination policies. It is questionable how much President Trump's administration will enforce this executive order, but it is still currently on the books.

Nonprofits and Governmental Agencies

Facilitator Guidance: You can simply cover the bullet points. The key point is the importance of serving everyone you are mandated to serve with equity and respect.

SLIDE: Business Case: Community Reputation

Facilitator Guidance: You can simply cover the bullet points. The main point is that especially in the United States, consumers and decision makers really examine how supportive of their various communities an enterprise is.

Talking Point: 84% of respondents to the HRC Corporate Equality Index survey have some form of engagement with LGBTQ+ communities (HRC CEI report 2019).

Facilitator Guidance: You may want to research how your organization has engaged with LGBTQ+ communities or supported local or national LGBTQ+ organizations. Examples can include:

- Sponsoring national or global LGBTQ+ organizations like the Human Rights Campaign, PFLAG, GLSEN, etc.
- Including LGBTQ owned businesses in your supplier diversity program and being a sponsor of the National LGBT Chamber of Commerce
- Supporting your local LGBTQ community center and having a table at your local LGBTQ Pride event.

SLIDES: Financial Business Case: (one for for-profit companies and one for nonprofit and governmental agencies).

Facilitator Guidance: For either slide, you may want to replace the numbers with those from your own organization, or you can state that this is an illustrative example

For-Profit Companies

Talking Points:

- Not only is the business case to fully support LGBTQ+ equity in the workplace qualitative, we can also show a quantitative financial "dollars and cents" business case.
- For example, if we assume that 6% of our employees are LGBTQ+ and because they feel they fully belong and are more productive, we can calculate a productivity savings.
- In addition, we can lower the rate of LGBTQ+ employees leaving our organization by just 5%, we can show the financial savings in recruiting and onboarding costs.
- And if we can increase our market share of LGBTQ+ consumers and decision makers because of supportive LGBTQ+ workplace policies, we can show a revenue increase in addition to the previous cost savings.
- Do remember that in addition to these financial benefits, having a strong LGBTQ+ workplace equity program will deliver additional tangible benefits like overall higher employee morale, recruiting benefits and general community good will.

Nonprofit and Governmental Organizations

Talking Points:

- Not only is the business case to fully support LGBTQ+ equity in the workplace qualitative, we can also show a quantitative financial "dollars and cents" business case.
- For example, if we assume that 6% of our employees are LGBTQ+ and because they feel they fully belong and are more productive, we can calculate a productivity savings.
- In addition, we can lower the rate of LGBTQ+ employees leaving our organization by just 5%, we can show the financial savings in recruiting and onboarding costs.
- Do remember that in addition to these financial benefits, having a strong LGBTQ+ workplace equity program will deliver additional benefits like overall higher employee morale, recruiting benefits and general community good will.

SLIDE: Summary and Next Section: Unconscious Bias and

Facilitator Guidance:

- Ask participants to summarize the key points from the section.
- Inform them that in the next section, we will explore how our LGBTQ+ coworkers want to be treated, how to interact respectfully with our LGBTQ+ colleagues, how unconscious bias and stereotyping can impact how colleagues may feel about and interact with LGBTQ+ colleagues, and we'll address solidarity, or how best to support LGBTQ+ coworkers and communities.

Unconscious Bias and Solidarity

Time	30-50 minutes
Purpose	The purpose of this section is to learn: • How people may be excluding or not supporting LGBTQ+ coworkers due to unconscious bias. • To build and demonstrate strong solidarity with LGBTQ+ employees and communities and engage as effective allies.
Advance preparation	Plan in advance how you may want to engage participants: • On one slide there is an optional discussion that people can have in groups of two or three. • After the bystander intervention slide, depending on time, there is an opportunity to divide participants into groups of three for observing and practicing challenging discussions scenarios.
Materials	• Slides • Facilitator's guide • For some of the detailed slides with action, the information is also contained within the participant's guide. You can refer participants to their guides, which also includes the four challenging discussion scenarios.
Facilitator	

SLIDE: Unconscious Bias and Solidarity

Talking Points:

- Solidarity is expressing support for a group of people. The word is used most often to describe a sense of unity with people who have been deprived of their rights in some way.
- In this section, we are going to discuss what unconscious bias is, and how unconscious bias and stereotyping can be barriers to full inclusion of LGBTQ+ people.
- The purpose of this is not to shame and blame people who may be unintentionally slighting LGBTQ+ people, but to make them aware of their unconscious biases and stereotypes so they can take corrective action.
- We will then cover how to be a strong ally to LGBQ+ people and offer tips for respectful engagement.

SLIDE: Unconscious Bias and Stereotyping

Facilitator Guidance: You can read the introductory statement and then simply read the two definitions of these words on the slide. Then start the conversation and share a few examples. Do try to make one or two LGBTQ specific.

Talking Points: After sharing the introductory definitions: (choose a few or add one of your own)

- I would like share a few stories or examples and think about your reactions. Think about how unconscious bias and stereotyping may even be present in your own thoughts.
  - A female coworker is sharing about being on her honeymoon with her spouse. What picture of this couple comes into your mind?
  - You're waiting for your top CEO candidate to walk in the interview room. From their resume, you expect they will be smart, articulate, experienced, etc. What gender, age, etc do you have in mind?
  - A surgeon and a nurse have a consultation with a patient. They provide helpful information and a thorough consultation. The patient leaves satisfied. How do you picture the surgeon and the nurse?
  - You're in the mall, and you notice a group of teenagers that are yelling and being rowdy. You feel concerned about what they may be up to. So you call the police. Would your reaction be different if they were white teens or teens of color?

- And discussing stereotyping. Very often we use stereotypes to describe people in a humorous way, but it can actually result in saying and doing and saying things that are disrespectful and even harmful.

SLIDE: What is Unconscious Bias?

Facilitator Guidance: Cover most of the points on this slide and you can expand on the bullet points using the talking points below. Also if time allows and there is interest in the unconscious bias discussion, you can also share the three additional facts at the end of the talking points.

Talking Points:

- The vast body of research on unconscious bias, also known as **implicit or hidden bias,** shows that:
- Many of our behaviors are rooted in **the unconscious mind.** We may not even be aware of some of our deep-rooted values and beliefs and how they shape our worldview and influence our behaviors and decision-making
- Unconscious biases form the basis of a great deal of **our behavior patterns about diversity**. These biases, which encompass both favorable and unfavorable assessments, arise without our awareness and have enormous impact on fairness and inclusiveness
- Unconscious biases are **pervasive.** We are susceptible to and have unconscious biases, which we develop throughout our life beginning at a very early age. These biases cause us to have feelings and attitudes about other people based on characteristics such as race, ethnicity, age and appearance
- Unconscious biases have **real-world impact** on our behavior.

- This last point is very interesting … that unconscious bias can sometimes lead us to say or do things that do not align with what we consciously believe. This makes it all the more important to understand and mitigate unconscious bias.

Additional Optional Talking Points:

- Here are three more facts about unconscious bias*. (from "The Neuroscience of the Brain on Bias" – Presentation by Lisa Blackwood MS, MA, LPC-S and Sherri Woodworth MA LPC-S)*
- Fact 1 – Earlier, we emphasized that unconscious bias is simply a natural brain function and is needed to manage with all the information our brains receive at once. The human brain takes in roughly 11 million pieces of information at one time, and can only functionally deal with about 40 – so we use mental shortcuts to navigate our world. This is not about "shaming and blaming, but it is important to realize that taking these mental short cuts can lead to errors in judgement if we do not take all the facts into account.
- Fact 2 - The challenge is that even with knowing unconscious bias exists in us, we may not be able to help ourselves. We need training in this area.
- And Fact 3 - Simply opening up the dialogue and encouraging conversations will significantly help others cultivate a more vibrant and inclusive environment. Hopefully we are doing this today around the LGBTQ+ communities.

SLIDE: Ways Unconscious Bias Is Manifested

Facilitator Guidance:

- You can present the points on this slide using the definitions below in the talking point, which are also in the participant guide.
- If time is limited, you can mention one or two and then skip to the last one. It's important to present microaggressions, often also called microinequities.
- If times allows, after presenting this slide, ask participants to discuss in pairs and then give one example for each type of bias how it can manifest itself against LGBTQ+ people in the workplace.
- It is important to keep the discussion more focused on how the unconscious biases particularly impact LGBTQ+ people, though you may also bring up one of two examples impact gender, race or age.

Talking Points:

- As we review some of the ways unconscious bias is manifested, think about when you have perpetrated or been the recipient of any of these manifestations within the work environment.
- You can present the points on this slide using the definitions which are also in the participant guide:
    - **Affinity bias:** Tendency to warm up to and prefer interaction with people like us.
    - **Halo effect:** Tendency to think everything about a person is good because we like them, and **Pitchfork effect:** Tendency to think everything about a person is bad because we dislike them.

- o **Confirmation bias:** Tendency for people to seek information that confirms preexisting assumptions and beliefs.
- o **Performance attribution:** When one group is given more credit or judged more harshly than another for the same behavior or performance.
- o **Group think:** When people try too hard to fit into a particular group by mimicking people in that group or holding back their thoughts and opinions. This may cause them to cover up parts of their identities … organizations then lose out on creativity and innovation.
- o **Microaggressions (also called microinequities)** Brief, commonplace verbal, behavioral and/or environmental slights, indignities, and insults, whether unintentional or intentional, that communicate negative perceptions about someone based solely on their socially-marginalized group membership.
- • Per this last bullet, next we are going to show some examples of microaggressions that are most often exhibited with LGBTQ+ people.

SLIDE: Examples of LGBTQ+ Microaggressions

Facilitator Guidance: Present these examples and then ask the audience for additional ones they've experienced or witnessed.

SLIDE: Deeper Look at Stereotyping

Facilitator Guidance: Present the points on the slide.

SLIDE: Stereotypes and Misperceptions of LGBTQ+ People

Facilitator Guidance:

- • Show this slide and explain that now we will have a discussion about common stereotypes about LGBTQ+ people.

SLIDE: Myths and Misperceptions

Facilitator Guidance:

- • Depending upon their level of familiarity, you may be able to engage participants in discussing stereotypes, myths, and misperceptions about LGBTQ+ people that they have experienced, witnessed, or even perpetrated before you show them the stereotypes listed on the slide.
- • Below are questions you may want to pose to participants.

Taking Points:

- • Which of these stereotypes and misperceptions have you heard the most frequently?
- • How are stereotypes harmful to LGBTQ+ people? How are they harmful to the work environment?
- • It is important to avoid these stereotypes and recognize that each LGBTQ+ person is unique and you will only understand who they are by getting to know each person as an individual.

SLIDE: Levels of Support and Allyship

Facilitator Guidance:

- This slide helps participants understand the levels of support and allyship for LGBTQ+ coworkers.
- Review the levels of support and allyship from being hostile, to neutral, to tolerant, to affirming, and finally, to advocating. Explain that the strongest level of allyship, an advocate, takes action and organizes others to make life better for those they support.
  - Hostile: being belligerent to LGBTQ+ people, often this behavior may be disruptive in the workplace and lead to disciplinary action against the perpetrator.
  - Neutral: not having even given this topic any thought.
  - Tolerant: overall accepting and understanding of LGBTQ+ colleagues
  - Affirming: generally positive with LGBTQ+ colleagues in the workplace
  - Advocate: takes actions and organizes others to make life better for LGBTQ+ people
- Ask participants to assess where they are currently and provide examples of what they can do now to demonstrate support for LGBTQ+ coworkers at their current level.
- Everyone may not necessarily become an advocate, but most workplaces have expectations and policies about how employees should treat each other. At a minimum, coworkers should demonstrate respect / be tolerant.+
- Ask participants to consider, "What steps might you take to move to the next level?"

Activity Instructions (optional): Have participants form pairs or groups of three and share what level of ally they are currently and what they can commit to do to move up a level. If they are already an advocate, have them consider how they can strengthen their advocacy.

SLIDE: Solidarity: Being an Ally

Talking Points:

- Let's review the definition of ally that we shared earlier in the terminology section of today's session: "An ally is a person with relative privilege and power who builds trusting relationships and acts in solidarity and with accountability with people and/or groups with marginalized identities without detracting from their power and voices." (Global Citizen, LLC for use by Pride in the Triangle)
- Now we will examine the actions we can take as an ally.
- Solidarity is demonstrating support for a group of people. The word is used most often to describe a sense of unity with people who have been deprived of their rights in some way.
- An ally is someone who is on your side. The word ally comes from the Latin word "alligare," meaning "to bind to."
- An ally does not have to be an expert on the people they are allied with, nor have all the answers. What is most important is that the ally is supportive, empathetic, committed, humble, and willing to learn and take action.

SLIDE: Taking Action as an Ally

Facilitator Guidance: This slide is shown with two clicks. The first click shows most of the information.

Talking Points:

- When it comes to being an ally, workplace leaders need to set the example. Hopefully each of you views yourself as a leader and is committed to serving as a positive example of allyship.
- The next two boxes give examples of actions leaders can take in the workplace.
- LGBTQ+ people are truly appreciative of our allies. They are a vital part of LGBTQ+ inclusion and equity efforts.
- Here are some examples of what an ally can do (Facilitator – feel free to add your own personal examples)
    - o March with you LGBTQ+ friends in a local Pride rally or parade
    - o Invite same gender couples to social functions along with your opposite-gender couple friends
    - o Use gender neutral language (like spouse instead of husband / wide) in discussions
    - o Share with coworkers in a positive way about an interesting movie or television show you saw with LGBTQ+ characters.

SLIDE: Do a Self-Check

Facilitator Guidance: For this slide, you may want to read through the nine points, or highlight two or three that are particularly meaningful to you and expand on them. You can also tell participants that these nine self-check items are in their participant's guide.

Talking Points:

- Here are nine questions you can ask yourself to see how strong your awareness and support are for LGBTQ+ communities.
- They are adapted from the Gay, Lesbian, Straight Education Network (GLSEN) that provides a lot of useful educational materials, especially for students, teachers, and administrators.

SLIDE: Be an Ally in Action

Facilitator Guidance: You can simply go through these points of how to be an ally in action. You can remind participants that these are included in the participant's guide and that these actions can also help them get to a higher level of allyship.

SLIDE: Having Challenging Conversations

Talking Points:

- Sometimes being an ally will necessitate having some challenging conversations with others who may not be supportive of LGBTQ+ communities. This can range from people:
    - o Who may be naïve offenders and make missteps due to lack of knowledge
    - o Who may be exhibiting unconscious bias and stereotyping

o Who may be outwardly hostile

- You may need to gauge where a person is coming from since you may not even want to engage with someone who is outwardly hostile and not willing to being open minded and learn.
- Here are five pointers for having those tough conversations.

SLIDE: Bystander Intervention

Talking Points:

- There are several different ways that you may end up engaging in conversations about LGBTQ+ people
- Many times, LGBTQ+ people or topics will naturally arise in conversations with a friend or work colleague, and you can use that opportunity to bring others along in their journey to supporting LGBTQ+ people.
- In some cases, you may have a direct encounter or witness a situation as a bystander that could cause harm to an LGBTQ+ person. It's important to seriously consider intervening with the goal of positively influencing the outcome.
- Your intervention may include being an ally and providing support to the person receiving the harmful behavior or comment.
- (Optional, when time allows): We will divide into groups of three to simulate some of these conversations and situations for intervention.

SLIDE: Challenging Conversations: Let's Practice

Facilitator Guidance: The practice conversations or interventions should be used in longer sessions. In the 4th scenario, you may to inform the group of the name that your company uses for your Black or African America employee resource group if you have one.

Activity Instructions:

- Instruct the group to divide into teams of three or four and assign them one of the four scenarios.
- An alternative to save time would be divide the participants into thirds into the 3 roles and do the activity in the large group.
- Explain to the group:
  o We are now going to practice having these challenging conversations, which in some cases may be interventions. These four conversations are in your participant's guide.
  o In some cases, the person making the statement may be outright hostile, and is some cases they may be a naïve offender or sincerely seeking information or assistance.
  o In the workplace, a colleague may actually initiate the conversation, or they may make a statement during a group discussion, or you may overhear a conversation between other people.
  o For the sake of this exercise, we will assume that the "commenter" spoke directly to you.

- One of you should play the role of the commenter, and make the statement described in your scenario. Feel free to substitute a local appropriate name in place of the name in the scenario.
- A second person should play the responder, and respond to the comment by engaging the person in dialogue.
- A third person should play the observer. After the conversation, they will share what they observed and offer additional ways to engage.
  - If there is additional time, groups can move to the next scenario and switch roles.
  - On the next page of the guide are some thoughts on comments that can made in the discussion. Please do not look at those until after the group had the discussion.

Scenario 1: COMMENTER: "I am so tired of José (or other locally-appropriate name) talking nonstop about his husband. He's hitting us over the head with his being a gay man. I don't go around telling everyone I'm straight. That photo of his husband and him on his desk makes me sick every time I pass by and see it. I really do find it offensive, and I may go to someone in HR and ask that the photo be removed."

Scenario 2: COMMENTER: "Did you hear that Aya (or other locally-appropriate name) was just promoted to be the Vice President of Marketing? I bet they promoted her to that position because she is both a lesbian and a woman, and they wanted to score double for equal opportunity quotas. I wonder if she even has the necessary skills to manage that area."

Scenarios 3: COMMENTER: "Did you meet the new employee, Terry (or other locally-appropriate name), who works down the hall? I cannot tell if he or she is a man or a woman. I don't know what to say or call him or her."

Scenarios 4: COMMENTER: "Did you hear that Rhonda (or other locally-appropriate name) was elected vice president of our company's Black (or African American – use the term used within your company) employee resource group? Do you think they realize she's bisexual? Black people are so homophobic. I cannot imagine a black group electing an out LGBTQ+ person to any kind of leadership position."

SLIDE: Be an Ally to Trans People

Facilitator Guidance: Go through the six points on this slide and point out that these items are included in the participant's guide. You may want expand on some of the bullets using the talking points below.

Talking Points:

- Transgender and gender-fluid people are often the most misunderstood in LGBTQ+ communities, and they could use our strong and unwavering support and allyship.
- First bullet: People may want to know how you ask for a person's pronouns in a sensitive way. One suggestion is to introduce yourself to them and share your pronouns. That opens the way for the other person to share their pronouns.

- You may even want to demonstrate how this is done or remind people that we used this technique to introduce ourselves at the beginning of the workshop. "Hi, I'm Leslie and my pronouns are they – them – theirs."
- Second bullet: Especially if you have known someone for a long time before their gender transition, you may slip and call them by the wrong name or pronoun. In the next slide we will go into a little more about names and pronouns since this is a key area in communicating with and about transgender people.
- Third bullet: You should treat a trans man or a trans woman with the same respect you would offer all people in the workplace. If the men or women do some sort of single-gender activity during lunch or after work, invite the trans person also, since they are part of that group.
- Fifth bullet: Especially if you seek to be at the advocate level, speak up if someone makes an unkind comment about your trans coworkers or transgender people in general. Call them out on it as unacceptable in the workplace.
- Sixth bullet: Please do not treat trans people any differently as you would any other fellow human being, even if you may be a little unfamiliar with interacting with trans people. Be genuinely kind and personable.
  - Complement them on a great job they did on a work project
  - Make a positive comment about a photo or interesting artifact on their office desk
  - Ask if they would like to join you for lunch as you would any coworker

SLIDE: Names and Pronouns

Talking Points:

- Since using the proper name and pronoun of a transgender person is an especially important and discussed about topic, we would like to provide some pointers in this area.

Facilitator Guidance: Read through the points and solicit questions. Also recall the earlier slide on gender and pronouns from the terminology section to the training.

SLIDE: What if Someone Comes Out to You?

Facilitator Guidance: Depending upon time left, you can simply summarize this slide and remind participants that these pointers are in their participant's guide. Or you can highlight a few of the bullets that are meaningful to you.

Talking Point:

- Especially if people know you are a strong ally or advocate, they may choose to "come out" to you. Hopefully you will feel honored that they trust you enough to share this with you.

SLIDE: What Not To Say

Facilitator Guidance: What not to say when someone comes out to you. Again, you can go through the slide points point or quickly summarize and point out these are in the participant's guide handout materials.

Talking Points:

- This slide has some suggestions on what not to say when someone comes out to you. You may want to focus on the first point of avoiding making the discussion about you instead of about them.

SLIDE: Responding to anti-LGBTQ+ Behavior

Facilitator Guidance: You can go through the slide points point or quickly summarize and point out these are in the participant's guide handout materials.

Talking Points:

- This slide provides tips for how to proactively address anti-LGBTQ+ behavior. As an ally, there may be times where you may need to step up and take action when you are a witness to anti-LGBTQ+ behavior
- Optional depending upon your corporate policy: And those in a management role may even have an organizational obligation to take action.

SLIDE: Summary and Next Section: Case Studies

Facilitator Guidance:

- Ask participants to summarize the key points from this section.
- Inform them that, in the next section, we will practice applying what we have learned in this training through reality-based case studies.

Case Studies

Time	40-60 minutes, depending on the number of cases
Purpose	The purpose of this section is for participants to apply their knowledge to reality-based case studies involving LGBTQ+ people and, based on their role in their company, develop effective responses to create a more inclusive and equitable workplace.
Advance preparation	- Select and/or adapt the number and type of case studies that are most relevant to your company. You may want to consult with human resources to ask for specific concerns that have been raised by or about LGBTQ+ employees and consumers and then create case studies that are based on these concerns. Be sure to remove all identifying information. - If your company is international, you will want to ensure all case studies are globally relevant. The Cultural Context slide can be changed from "setting" to "country." - Familiarize yourself in advance with Appendix B: Case Studies – Possible Responses
Materials	- Slides - Facilitator's guide - Case Studies – Possible Responses (Appendix B)
Facilitator	

SLIDE: Case Studies

SLIDE: Purpose

- Explain the purpose of this section to participants.

SLIDE: Case Studies: Instructions

Activity Instructions:

- Divide participants into small groups of five to eight people. Try to ensure as much diversity in each group as possible. Assign each group a case study that you selected and/or adapted in advance.
- You will assign each group a different case study. If you have a very large number of participants, you can have two groups use the same case study.
- If you are an international company, you will want to ensure all case studies are globally relevant. The Cultural Context slide can be changed from "setting" to "country."

- Provide participants the following instructions and give them 20 minutes to complete the activity:
  - Read the selected case study
  - Discuss and answer the questions:
    - What are the particular concerns for LGBTQ+ employees?
    - What initial steps should company leaders take to address these concerns?
    - What can you do in your current company role to support LGBTQ+ employees and create a more inclusive and equitable workplace?
  - Prepare your report of your group's top three responses to each question and select a reporter

Facilitator Guidance: Refer to Appendix B: Case Studies – Possible Responses and familiarize yourself in advance.

SLIDES: Case Study (the time needed will vary depending on which and how many case studies you selected and/or adapted)

Activity Instructions:

- Show each case study slide when that group is making their report.
- For report outs to the large group, ask each small group reporter to read their case study out loud and provide their top three responses to each question. Each report out should take no more than three minutes.
- After all of the groups have presented, summarize the main themes and actions company leaders and training participants can take to support LGBTQ+ employees and create a more inclusive and equitable workplace.
- Ask participants to keep these actions in mind as they consider what commitments they will make to advance LGBTQ+ equity in the workplace

SLIDE: Summary and Transition: Next Steps and Conclusion

- Ask participants to summarize the section contents and their key takeaway points.
- Transition to the next training section.

Next Steps and Conclusion	
Time	30 minutes
Purpose	The purpose of this section is for participants to formulate their commitments and action steps to create a more inclusive and equitable workplace for LGBTQ+ colleagues and provide closure for the training.
Advance preparation	None
Materials	• PowerPoint slide set • Facilitator's guide • Commitment and Action Steps worksheet (Appendix C)
Facilitator	

COVER SLIDE: Commitments, Action Steps, and Closure

SLIDE: Purpose

Explain the purpose of this section.

SLIDE: Commitment: Workplace Inclusion and Equity

*Facilitator Guidance***:**

- On their worksheets, ask participants to commit by a date to take action in their current role to advance LGBTQ+ inclusion and equity in their workplace.
    - Examples may include:
        - Creating a more inclusive work environment for LGBTQ+ employees
        - Creating equitable recruitment and hiring processes for LGBTQ+ candidates
        - Creating workplace equity for LGBTQ+ employees

SLIDE: Action Steps

- On their worksheets, ask participants to identity 3-5 action steps they will take to follow through on their commitment to advance LGBTQ+ inclusion and equity in their workplace.
    - Examples may include:
        - Creating a more inclusive work environment for LGBTQ+ employees
            - Consistently including your pronouns when introducing yourself at work
            - Inviting LGBTQ+ coworkers to lunch and asking them how you can support them as an ally

- Organizing or supporting LGBTQ+ awareness-raising activities
- Interrupting LGBTQ+ microaggressions and making bystander interventions
- Forming or supporting an LGBTQ+ employee resource group (ERG)
- Creating equitable recruitment and hiring processes for LGBTQ+ candidates
  - Reviewing recruitment and hiring processes and forms for LGBTQ+ inclusion and equity
  - Ensuring interviewing committees are trained on LGBTQ+ inclusion
- Creating workplace equity for LGBTQ+ employees
  - Reviewing and revising organizational policies for LGBTQ+ inclusion and equity
  - Instituting a pronoun use policy in email signatures, the employee directory, on name badges, etc.
  - Developing and publicly sharing an organizational statement on LGBTQ+ inclusion and equity

SLIDE: Meeting with Accountability Partners

- Ask accountability partners to set a follow-up meeting date and plan for how they will support each other in following through with their commitments.
- Invite participant to take a photo with their accountability partner, commitments, and action steps as a reminder. Inform them that you will email them on a certain date in 6-8 weeks to remind them to follow through on their commitments and action steps.

SLIDE: Summary

- Ask participants to summarize the section contents and their key takeaway points.
- Facilitate a discussion on key takeaway points from the training overall.

SLIDE: Evaluation

- Ask participants to complete the training evaluation. (A sample evaluation is included in the Toolkit).

SLIDE: Closure

- Solicit and answer any final questions.
- Provide information about any follow-up activities.
- Thank participants for their engagement and provide facilitators' contact information
- Closing circle: Ask participants to form a circle and each share their personal commitment and one appreciation of their accountability partner with the group.
- (Optional): Ask participants to share, summarized in one word, their thoughts or feelings at the end of the training.

Facilitator Guidance: Please keep final two slides in the slide deck without modification (Meet Your Toolkit Authors & Toolkit License and Citation)

Appendix A: LGBTQ+ Terminology and Definitions*

Ally	A person with relative privilege and power who builds trusting relationships and acts in solidarity and with accountability with people and/or groups with marginalized identities without detracting from their power and voices.
Androgynous	A person with a neutral or ambiguous social role who presents with masculine and feminine characteristics
Asexual	A person who is not sexually attracted to anyone or does not have a sexual orientation
Bicurious	Curiosity about having sexual relations with a same gender person
Biological Sex	A medical term designating a certain combination of gonads, chromosomes, external gender organs, secondary sex characteristics and hormonal balances. This term is often subdivided into male and female without recognizing the existence of intersexed bodies.
Biphobia	The fear of, discrimination against or hatred of bisexuals. Biphobia can exist within the LGBTQ+ community, as well as in the general society.
Bisexual	A person who is emotionally, physically and/or sexually attracted to people of their own and other genders.
Blending (also: Passing)	A person's ability to be regarded at a glance to be a cisgender man or a cisgender woman or an LGB person's ability to be regarded as heterosexual.
Butch	A person who identifies themselves as masculine, whether it be physically, mentally and/or emotionally. "Butch" is sometimes used as a derogatory term for lesbians, but it can also be claimed as an affirmative identity label.
Cisgender	A person whose gender identity is in alignment with their sex assigned at birth; a person who is not transgender.

Cisgenderism/Cissexism	The assumption that all people are or should be cisgender in a way that invalidates people's own understandings of their genders and bodies, including misgendering, pathologizing, and binarizing people.
Cisnormativity	The assumption that people normally or naturally remain in the gender they were assigned at birth.
Coming out	A personal, individual process by which a person accepts and validates their sexual orientation and gender identity. They may choose to share their identities or remain private.
Covering	When members of the non-dominant culture hide, downplay, or change their identities or aspects of their identities in an attempt to appear to fit in better with the dominant culture.
Drag/Drag queen	The theatrical performance of one or multiple genders as a member of another gender.
Dyke	A term referring to a masculine lesbian. While this term is claimed in an affirmative manner by some (not necessarily masculine) lesbians to refer to themselves, it is largely regarded as derogatory.
Fag hag	A term used to describe women who prefer the social company of gay men. While this term is claimed in an affirmative manner by some, it is largely regarded as derogatory.
Family of choice	Persons an individual sees as significant in his or her life. It may include none, all, or some members of his or her family of origin. In addition, it may include individuals such as significant others or partners, friends, coworkers, etc.
Femme	A feminine-identified person of any gender or sex
Gay	1. A term used in some settings to represent males who are attracted to males in a romantic, erotic, and/or emotional sense. Not all men who engage in same-gendered sexual relations identify as gay. 2. A term used to refer to the LGBTQ+ community as a whole or as an individual identity label for anyone who does not identify as heterosexual. This can be perceived to be sexist by women and exclusive of non-binary people.

Gender expression	How a person demonstrates their gender through the way they act, dress, behave and interact
Gender identity	The gender that a person feels they are in their core. This is unique to each person may or may not correspond with their sex assigned at birth or social conventions.
Genderqueer	A person who does not subscribe to conventional gender distinctions
Heteronormative	Individual and institutional assumptions that everyone is heterosexual and that heterosexuality is superior to homosexuality and bisexuality
Heterosexual	A term used to describe someone who has primary emotional and sexual attraction to people of another gender. Also: "straight"
Heterosexism	Preference for heterosexuals and prejudice or discrimination against LGB people based on the assumption that heterosexuality is the normal sexual orientation.
Homophobia	The irrational fear or dislike of homosexuals or bisexual individuals
Homosexual*	A term to describe someone who has primary emotional and sexual attraction to people of the same gender. This term is overly clinical, largely outdated, and sometimes considered offensive. Also: queer, LGB
Internalized homophobia	LGB people's internalized self-hatred and acceptance of heterosexism and the negative messages that the dominant group perpetuates against LGB individuals
Intersex	A person having the characteristics of male and female biological organs or genitalia; may include chromosomal and hormonal conditions. Also: hermaphrodite (outdated term)
Lesbian	A term used to describe female-identified people attracted romantically, erotically and/or emotionally to other female-identified people

LGBTQ+	Lesbian, gay, bisexual, transgender, queer and "+" meaning additional, related terms
Misgender	Referring to someone, especially a transgender person, using a word, especially a pronoun or form of address, that does not correctly reflect the gender with which they identify.
MSM	Men who have sex with men and may or may not identify as gay
Non-binary	Umbrella term for descriptions of genders that fall between or beyond the gender binary – for example: gender neutral, genderfluid, agender, pangender, androgynous, and genderqueer.
Out/of the closet	Refers to varying degrees of being open about one's LGBTQ+ identities
Pansexual	Not limited in sexual choice with regard to biological sex, gender or gender identity
Passing	A person's ability to be regarded at a glance to be a <u>cisgender</u> man or a cisgender woman or an LGB person's ability to be regarded as heterosexual
Poly/amorous	The philosophy or state of being in love or romantically involved with more than one person at the same time
Queer	Historically a negative term to describe lesbian and gay people, "queer" has been reclaimed by some people as a positive term describing all those who do not conform to rigid notions of gender and sexuality.
Questioning	People who are in the process of exploring their sexual orientation and/or gender identity.
Sexual orientation	A term used to describe someone's primary emotional and sexual attraction to people of one's gender or other genders and one's conscious or subconscious decision to define this attraction.
Straight	Heterosexual
Stud	An African American and/or Latina masculine lesbian. Also: "butch" or "aggressive"

Trans/gender	A term used to describe someone whose gender identity is not congruent with his or her biological sex, regardless of the status of surgical and hormonal gender reassignment processes. Refers to a continuum of gender expressions, identities and roles that expand the dominant cultural understanding of what it means to be female or male. May be heterosexual, bisexual or homosexual.
Transphobia	The irrational fear of those who are gender variant and/or the inability to deal with gender ambiguity.
Transvestite*	An outdated term to describe someone who dresses in clothing generally identified with people of other genders. Preferred terms are drag queen/king or in drag.
WSW	Women who have sex with women and may or may not identify as lesbian
*Outdated and potentially offensive terms	

Appendix B: Case Studies – Possible Responses

Case Study 1: Over the past year, numerous LGBTQ+ employees have registered anonymous complaints about feeling excluded as well as experiencing microaggressions and perceived discrimination by their coworkers, including supervisors.

- What are the particular concerns for LGBTQ+ employees?
    - These complaints may indicate possible discrimination on the basis of sexual orientation and gender identity and expression, which could lead to legal action, which is difficult, expensive, and stressful for everyone.
    - These actions may indicate that the work environment is inhospitable to LGBTQ+ employees, which negatively impacts their job satisfaction and work productivity and performance.
    - Microaggressions against one minority group can send a message to people with other marginalized identities that they are not welcome in the current work environment that may be favoring a particular dominant culture.
    - Microaggressions against LGBTQ+ people can also negatively impact allies who may be concerned about their LGBTQ+ coworkers, family members, and friends, even in other workplaces and settings.
- What initial steps should company leaders take to address these concerns?
    - Leaders should review the company's nondiscrimination policies and procedures and make revisions, as needed.
    - Leaders should conduct an employee feedback survey, which could be integrated into a broader employee engagement survey, to ask more specific questions about a welcoming and inclusive environment for LGBTQ+ employees.
    - Executive leadership can set an example of inclusion by using their pronouns, internally communicating zero tolerance for discrimination against LGBTQ+ employees, and publicly communicating their commitment to LGBTQ+ employees and communities.
    - Leaders can provide mandatory training on LGBTQ+ workplace equity for managers and employees, with additional content for managers on serving as a role model of inclusion excellence and managing all employees in an equitable and inclusive manner.
    - Leaders can initiate the formation of an LGBTQ+ employee resource group (ERG) or consult with the existing LGBTQ+ ERG to solicit their input on creating a more inclusive and equitable work environment for LGBTQ+ employees.
    - Leaders can set benchmarks with metrics to measure the current state and improvements in LGBTQ+ inclusion and equity.
- What can you do in your current company role to support LGBTQ+ employees and create a more inclusive and equitable workplace?
    - Introduce yourself consistently using your pronouns, including in meetings, on your email signature, by wearing a button, and through other visible demonstrations of support.
    - Post an LGBTQ+ affirming sign or sticker in your workspace.

- Join and/or support your company's LGBTQ+ ERG.
- Volunteer your assistance with LGBTQ+ workplace equity training and other initiatives.
- Engage in bystander intervention when you witness someone making negative comments about or actions towards LGBTQ+ people.

Case Study 2: Several LGBTQ+ employees have raised concerns with Human Resources that the company's benefits package discriminates against LGBTQ+ employees because it does not equitably cover same-gender partners and family members not related by marriage or biology, such as their partner's children by a previous relationship.

- What are the particular concerns for LGBTQ+ employees?
    - Employee benefits usually comprise 30-35% of employers' total compensation packages. When some employees are offered benefits that others are not, this indicates an inequity among employees, which negatively impacts current employees and can also hurt recruiting efforts and new talent acquisition and retention.
    - LGBTQ+ people may not be able to offer health and life insurance and other financial security for their family members that their heterosexual coworkers are able to offer.
    - Non-inclusive policies marginalize LGBTQ+ relationships.
    - Inequitable policies and compensation packages can create an emotional strain for LGBTQ+ employees and feelings of being devalued by their employer.
- What initial steps should company leaders take to address these concerns?
    - Leaders should review the company's nondiscrimination policies, make revisions as needed to ensure equity, and clearly communicate the policies to all employees.
    - Leaders should ask questions about employees' satisfaction with the total benefits package in the annual employee engagement survey.
    - Leaders should discuss these concerns with the company's benefits service provider and ask them to make improvements in their packages to ensure equity for LGBTQ+ employees.
- What can you do in your current company role to support LGBTQ+ employees and create a more inclusive and equitable workplace?
    - Advocate for an inclusive benefits package with your HR team and executive team.
    - Share your concerns and make the business case for equitable benefits with your HR team.

Case 3: Recently, several of your company's partners and vendors have been featured in the news for their opposition to LGBTQ+ people's rights. Some LGBTQ+ employees and customers have asked company leaders to stop doing business with them.

- What are the particular concerns for LGBTQ+ employees?
    - When a company does business with other companies that have made contributions to anti-LGBTQ+ campaigns and organizations, this may create conflict and a feeling of marginalization for LGBTQ+ employees that their employer is not concerned about their well being and rights.
    - A partner or vendor's anti-LGBTQ+ practices may be in violation of the company's anti-discrimination policy.
- What initial steps should company leaders take to address these concerns?
    - Leaders should research their company's procurement policies to ensure they include language about only doing business with companies that respect LGBTQ+ rights. If they do, they need to ensure their company's practices are in alignment with their policies. If they don't, they need to revise their policies to include such language and ensure their practices are in compliance with them.
    - Leaders should review their list of partners and vendors to ensure they are in alignment with the company's nondiscrimination policies.
    - Leaders can support the [National LGBT Chamber of Commerce](#) and their local LGBTQ+ Chamber to proactively connect and do business with LGBTQ+-owned businesses.
- What can you do in your current company role to support LGBTQ+ employees and create a more inclusive and equitable workplace?
    - Raise awareness about your company's practices that may not be in alignment with their policies.
    - Advocate for changes to policies and procedures so they are more inclusive, as needed.
    - Whenever possible, patronize LGBTQ+-owned businesses for the events you organize.
    - Share information about the National LGBT Chamber of Commerce and local LGBTQ+ Chamber information with your leadership.

Case 4: A leader at one of your company's largest clients recently complained to your company's CEO about the team assigned to them because it included LGBTQ+ people who made them "feel uncomfortable."

- What are the particular concerns for LGBTQ+ employees?
    - The client's act of targeting LGBTQ+ professionals is demoralizing for LGBTQ+ employees, which can negatively impact their motivation and performance. This can also cause an employee to question and feel concerned about whether their employer will take a stand in their support.
    - A client's discrimination against them based on their sexual orientation and gender identity and expression can limit LGBTQ+ employees' career visibility and performance and have a negative impact on their job performance and growth potential.
    - A client's discrimination based on sexual orientation and gender identity and expression can trigger an employee's insecurity about their own validity and self worth that is rooted on broader societal oppression. This can be harmful to employees' health and well being as well as their job satisfaction and performance.
- What initial steps should company leaders take to address these concerns?
    - Leaders should always stand behind their employees and their company's nondiscrimination policy and be ready to walk away from a client when needed.
    - Leaders could research the client's nondiscrimination policy to see if their actions violate their own policy.
    - Leaders could educate the client about the business case for LGBTQ+ workplace equity and encourage them to undergo in LGBTQ+ workplace equity training.
- What can you do in your current company role to support LGBTQ+ employees and create a more inclusive and equitable workplace?
    - Serve as an ally for the LGBTQ+ employees who were targeted by this complaint by providing individual support and advocating on an organizational level.
    - Hold leaders accountable to support LGBTQ+ employees and not concede to clients' unreasonable and discriminatory complaints.

Case 5: Your company's website and marketing materials include information about your progressive polices on sexual orientation and gender identity and expression and images of same-gender couples. Recently, several anti-LGBTQ+ organizations with considerable influence have complained to your CEO and threatened to mount a boycott against your company unless you retract them.

(***Note***: The photos of LGBTQ+ couples in this slide may cause some people who are not accustomed to feel uncomfortable. It's important for facilitators to remain aware of any spoken or unspoken discomfort and address it directly by talking about how part of the purpose of this training is to sensitize people and increase their familiarity and comfort with LGBTQ+ people and issues).

- What are the particular concerns for LGBTQ+ employees?
  - These organizations' actions targeting LGBTQ+ people can be demoralizing for LGBTQ+ employees, which can negatively impact their motivation, performance, and growth potential.
  - Negative actions such as these can cause employees to question and feel concerned about whether their employer will take a stand in their support.
  - These organizations' discrimination based on sexual orientation and gender identity and expression can trigger employees' insecurity about their validity and self worth that is rooted on broader societal oppression. This can be harmful to employees' health and well being as well as their job satisfaction and performance.
- What initial steps should company leaders take to address these concerns?
  - Leaders should always stand behind their employees and their company's nondiscrimination policies and be ready to defend them to the public as needed.
  - Leaders could engage these organizational leaders, educate them about the reasons for their company's commitment to LGBTQ+ equity, and encourage them to engage in LGBTQ+ equity training.
  - Leaders could research the organizations' nondiscrimination policy to see if their actions violate their own policies.
- What can you do in your current company role to support LGBTQ+ employees and create a more inclusive and equitable workplace?
  - If needed, you can make the business case and remind your company leaders about the substantial influence and purchasing power of LGBTQ+ communities and the importance of your company demonstrating their support and inclusion of LGBTQ+ communities.
  - You could consider engaging with these organizations' leaders as a private citizen to educate them about the importance of respecting LGBTQ+ rights and encourage them to engage in LGBTQ+ equity training. (It is advisable to check with your company leaders beforehand to ensure you are not in violation of any company policies or interests).

Case 6: Your company recently formed Pride (LGBTQ+) employee resource groups (ERGs) in several socially-conservative settings. One of the Pride ERG chairs, a lesbian, was outed to her family and community by a local reporter when they aired her interview about the Pride ERG. She is now being harassed and threatened by some of her neighbors and on social media.

- What are the particular concerns for LGBTQ+ employees?
  - The Pride ERG chair has legitimate concerns about her physical and emotional safety.
  - She may have questions about whether and how the company will take steps to offer her protection and emotional support.
  - She may need legal support to protect her from harassment and potential acts of violence.
  - She may experience emotional suffering, which can affect her health and well being and work performance.
  - She may be concerned about how this will affect her leadership and role in the company and the ERG.
  - Other LGBTQ+ employees and Pride ERG members may have concerns about similar threatening actions against them.
- What initial steps should company leaders take to address these concerns?
  - Leaders should provide the employee support to ensure her safety and well being.
  - Leaders should offer the employee legal resources and emotional support, as possible and needed.
  - Leaders should provide additional support and resources to the entire ERG and all LGBTQ+ employees, as they also may be concerned about their own safety and security.
  - Leaders should make a public statement of support for LGBTQ+ rights and ERGs.
- What can you do in your current company role to support LGBTQ+ employees and create a more inclusive and equitable workplace?
  - Provide personal support and encouragement to the employee.
  - Local coworkers can work closely with the affected colleague, ensuring her involvement and agreement, to offer education and advocacy on her behalf to the neighbors and on social media.
  - Advocate with company leaders about the importance of demonstrating complete support to the employee in alignment with their company policies and commitments.

Case 7: Several different employees have complained to your company's Human Resources department about losing out on top qualified candidates who were repeatedly addressed by the incorrect gender during the screening and interviewing process.

- What are the particular concerns for LGBTQ+ employees?
    - Misgendering is referring to someone, especially a transgender person, using a word, especially a pronoun or form of address, that does not correctly reflect the gender with which they identify. Misgendering can trigger trauma and pain rooted in familial and societal oppression of trans people and can cause people to feel devalued and unseen.
    - Misgendering of candidates could exacerbate other existing tensions among diverse employees, including intergenerational conflicts.
    - Misgendering may impact candidates and employees in intersectional ways, such as a Black employee who has very short hair being misgendered and raising questions about racism and transphobia.
- What initial steps should company leaders take to address these concerns?
    - Leaders should provide training to all employees on their recruitment, screening, and hiring processes.
    - Leaders should review the company's nondiscrimination policies, make revisions as needed, and clearly communicate the policies with all employees.
    - Leaders could reach out to the candidates and offer an official apology on behalf of the company and assurance of steps the company is taking to rectify the problem.
- What can you do in your current company role to support LGBTQ+ employees and create a more inclusive and equitable workplace?
    - Provide personal support to LGBTQ+ employees who were part of the recruiting, screening, and hiring process where the misgendering occurred.
    - Raise awareness with LGBTQ+ ERG, HR, and leadership.
    - Engage in bystander intervention when misgendering is occurring.
    - Offer to assist with recruiting and training of recruiters.

Appendix C:

LGBTQ+ Workplace Equity Commitments and Action Steps Worksheet

Commitment

By _____ [date], in my current role, I commit to do the following to advance LGBTQ+ inclusion and equity in my workplace.

_____

_____

Action steps

I will take the following 3-5 action steps to follow through on my commitment to advance LGBTQ+

inclusion and equity in my workplace.

_____

_____

_____

_____

_____

Accountability

My accountability partner and I will support each other in following through with our commitments and action steps by:

_____

_____

_____

Accountability Partner Check in

First meeting date and time: _____