

Getting LGBT+ inclusion right in employee surveys

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Many organizations are working to enhance the workplace experience for employees because of the clear link between employee engagement and business outcomes¹ and employee experience and work performance.² But, it is not possible to optimize business outcomes unless all employees have the chance to fully utilize their talents.

The Lesbian, Gay, Bisexual, and Transgender (LGBT+) community is an employee group that may not be fully understood and supported in all organizations. Some organizations are using employee surveys to bring these employees into the conversation so their needs can be identified and supported. Armstrong and colleagues³ found that more successful organizations have a comprehensive talent management plan that includes diversity and inclusion priorities. By including the LGBT+ perspective in their surveys, these organizations have a more complete understanding of how to engage their entire workforce.

Across the globe, cultural and legal changes are bringing a spotlight to the needs of the LGBT+ constituency in the workplace. Different countries address these issues according to their own cultural norms and laws, and there is great variability in the focus, response, and acceptable practices depending on the country in which the workforce is located. For these reasons, human resources professionals must be thoughtful about how they address LGBT+ concerns in all aspects of their talent management work, including employee surveys.

This paper discusses:

- The benefits of addressing the needs of this constituency in employee surveys.
- The kinds of questions that are relevant for employee surveys and the associated communications support required.
- Global considerations, including the fact that laws and regulations in some countries prohibit the inclusion of LGBT+-focused questions in employee surveys.
- Data analysis and behavior change action opportunities specific to the inclusion of LGBT+-focused survey questions.

The value of including LGBT+ in employee surveys

There are many reasons why organizations should consider using an employee survey to better understand the needs of the LGBT+ employee:

- **Organizational outcomes:** To optimize outcomes, organizations need to create an environment where all employees can contribute fully. The confidentiality of surveys provides a way to glean insights that might not otherwise surface. These insights could lead to important organizational improvements.
- **Employee experience:** The experience of employees impacts their performance, the performance of their co-workers, the customer experience, and ultimately business outcomes.⁴ Surveys can be used to determine whether LGBT+ employees are having a positive experience at work. This can enhance the workplace experience of all employees because employees who believe their minority co-workers are being mistreated can become less productive themselves.⁵
- **Actionable insights:** LGBT+ employees may have some unique concerns that could be revealed in a survey. For example, lower engagement scores amongst LGBT+ employees may be a sign that they have experienced discrimination or unequal treatment.⁶ Analysis of survey data can help organizations promote a culture of tolerance throughout the organization. Such insights have led, for example, to the creation of business resource groups (BRGs) and LGBT+ mentorship programs. Some organizations have also used these insights to help them build an employment brand that attracts other people from a diverse background and people who value diversity of thought.

¹We understand that there are variations in the acronym used to represent this constituency. We use “LGBT+” for the purposes of this paper, but recognize that organizations may include variations of this acronym, such as “LGBTQ” to represent Lesbian, Gay, Bisexual, Transgender, Two-Spirited, and Queer employees. We encourage organizations to include all demographics of interest on their surveys and in their item wording.

Using surveys to gain insights into LGBT+ concerns

Survey content

There are some countries in which it is acceptable to ask questions about LGBT+ status and others in which it is illegal or culturally taboo to do so. Please consult with counsel ahead of time to determine whether it is legally permissible and, in addition, safe and culturally appropriate to proceed with this type of survey. There are three primary best practices for including questions relevant to the LGBT+ constituency in a survey:

1. Identify the constituency with demographic questions:

In countries where it is legal and culturally acceptable to do so, organizations may include demographic questions regarding LGBT+ status as part of the survey. Those demographic questions are typically placed along with other demographic questions such as those about age, gender or tenure.

Some organizations place these questions together at the beginning of the survey, before the main content questions, to maximize the number of responses. However, this could prime employees to have their demographic characteristics in mind throughout the rest of the survey. It may also elicit negative reactions from employees who do not like being asked about their demographic characteristics upfront.

Other organizations place the LGBT+ status questions at the end of the survey. This may reduce the number of responses from employees who exit the survey after completing the content questions, but it does avoid the potential disadvantages of earlier placement and would be our recommended best practice.

We also recommend that the organization emphasizes why LGBT+ demographic questions are in the survey. Sample introductory text is presented later in this paper when we discuss ways to introduce such questions in engagement surveys.

Another option is to create a separate workplace census as an addendum to the main employee survey. This kind of census provides an opportunity for employees to voluntarily self-report personal characteristics that, when aggregated, can be used to understand demographic differences in the survey data. This approach provides an element of separation between the core employee survey that is focused on understanding sentiment and the workplace census survey that is focused on understanding demographic patterns. This is a useful approach in organizations where trust is lower than ideal because it enhances employees' confidence about the confidentiality of their individual responses. A periodic (typically once per year) self-report census is also useful when an organization's human resources systems do not have the capability of employee real-time self-reported updates of their personal information.

Sample demographic questions pertaining to the LGBT+ employee constituency are provided below. Sample demographic questions that are inclusive of the LGBT+ community are provided below. These examples follow the guidance of the Human Rights Campaign⁷.

Self-identification should not be used:

- When it is illegal to collect and store LGBT+ data
- When your organization decides it is not safe to collect this information, although it is legally acceptable to do so
- When you are collecting the data in a country that does not allow the data to be stored outside of the country in which the data are collected. (This is a constraint that may impact your ability to analyze the data. We do not recommend that you collect any data unless you can use it for the intended purpose)

Figure 1. Example LGBT+ demographic questions

Gender	What is your gender?	<ul style="list-style-type: none"> ▶ Male ▶ Female ▶ Non-binary / third gender ▶ Prefer to self-describe in another way ▶ Prefer not to say
Transgender	Do you identify as transgender?	<ul style="list-style-type: none"> ▶ Yes ▶ No ▶ Prefer not to say
LGBT+ Community	Do you consider yourself a member of the Lesbian, Gay, Bisexual and/or Transgender (LGBT) community?	<ul style="list-style-type: none"> ▶ Yes ▶ No ▶ No, but I identify as an LGBT+ Ally ▶ Prefer not to say

2. Survey relevant content areas: In addition to the use of demographics, organizations should also consider including items that provide opportunities for the LGBT+ perspective to be captured, including:

- **Asking Likert-type survey items** applicable to the entire employee population that will capture information relevant to the LGBT+ constituency. For example:
 - My ideas and suggestions count.
 - On my team, everyone is treated with respect.
 - I feel included at this company.
 - At this company, I can be myself at work.
 - I feel comfortable voicing my opinions even if they are different from others’.
- **Asking open-ended questions** that are broad enough to allow all employees, including LGBT+ employees, to talk about their unique work experiences. Here are some examples:
 - What would make it easier for you to be successful here?
 - What is the one thing Company X could do to make it easier for your ideas to be heard?
 - What are the three words you would use to describe your experience at Company X?

- **Asking LGBT+ constituency-specific items** to those who self-identify in the demographic questions as LGBT+. Here are some examples:
 - The LGBT+ leaders in this organization are visible and can be role models.
 - Being myself at work does not impact how my work is evaluated.
 - I know where to go at work to get support when I need it.
 - My company provides and supports programs aimed at meeting my needs to make me feel like a valued member of the organization (e.g. BRGs, mentorship programs, diversity and inclusion training initiatives).

Regardless of the kind of questions that are asked, organizations can use branching to ensure specific respondents are asked particular questions: For example, an employee who self-identifies as LGBT+ might be asked follow-up questions that are not asked of all respondents. Working closely with survey project teams and legal counsel will ensure the branching rule can be applied correctly and consistently.

3. Ensure appropriate analysis and reporting: The overall desired outcomes of any survey, including LGBT+ content, should guide the design of the survey, the selection of the questions that are asked, and the way the data are analyzed and reported. To protect employee confidentiality, reports are not typically generated unless there are five or more responses. Additionally, data is always reported at the team or aggregate level and never at the individual level for any question or demographic in a survey. This applies equally to questions pertaining to LGBT+ concerns.

In terms of guidance on the survey reports that tend to be generated for specific stakeholders, we would advise the following:

- **Managers** are usually interested in using the survey results to construct local action plans. However, it is best practice not to report data related to LGBT+ concerns at the department level given the lower number of responses typically associated with such questions. Most of our clients report these results only at the division or executive level, where strategic action planning about LGBT+ concerns is feasible.
- **Executives** are typically interested in understanding trends over time as well as regional and other variations. They want insights that can help them take strategic action across the enterprise. Therefore, reporting and analysis of LGBT+ concerns is at the organizational level for these stakeholders.
- **HR professionals** are interested not only in data trends over time, but also in understanding how the initiatives they have implemented are impacting the employee experience. HR professionals also want to use the demographic questions to slice the data into meaningful groups so that unique concerns can be identified (at a group level). Reporting must enable these users to conduct meaningful analyses.

Survey result analysis and action planning

There are ways employee survey results can be used to reveal actionable insights beyond the appropriate reporting of results that include the LGBT+ constituency. For example:

- The use of demographic questions, including LGBT+ demographics, allows comparisons of survey scores across different populations within the organization. For instance, organizations can compare percent favorable and mean employee engagement scores among those who identify as

LGBT+ and those who do not. Depending on the size of the organization, clients can also compare LGBT+ and non-LGBT+ engagement scores across locations and regions (to the extent allowable by local laws). Differences in engagement scores can inform organizational action plans for improving employee engagement and associated performance.

- The organization can develop action plans relating to increasing diversity and inclusion initiatives throughout the organization in an effort to increase the engagement of all employees.
- Some organizations share survey results with their employee resource groups (ERGs) so members of the group can create action plans they can implement themselves and/or share with the leaders of the organization.
- Another analytic opportunity involves examining the frequency of the “prefer not to answer” response. Often, those that use the “prefer not to answer” option have lower engagement scores. They may choose this response because of fear or a lack of trust. Analyzing these responses to see how the proportion of “prefer not to answer” responses varies over time can offer new insights. If the proportion of these responses goes down, it can be inferred that trust is increasing. Conversely, if the proportion of these responses increases, it can be inferred that trust is declining. It is important to understand the trend in the movement of these responses over time.

The above analytical approaches can be used where it is legally and culturally acceptable to do so and when the necessary analytical tools are available.

Incorporating employee surveys into a broader strategic planning effort

LGBT+ issues in the workplace are not new, but they are getting more attention than ever before. As noted in a recent Los Angeles Times article, LGBT+ issues are perceived by many as the next frontier in workplace equality in the United States.⁸ Several other countries, including Thailand, Australia, and many European countries, already ban LGBT+-related discrimination in employment. IBM is a long-time leader in advancing LGBT+ inclusion globally, notably in Asia and Latin America. Other major global companies, such as Google Inc., Microsoft Corp., and Coca-Cola Corp., are engaged in efforts to promote LGBT+ rights in countries beyond the United States and Western Europe.⁹ To that end, organizations that intend to tackle this issue in surveys should have a plan for how they will respond to questions from employees about these initiatives.

Typically, addressing LGBT+ issues in a survey is a natural progression for organizations. Most organizations start their employee listening efforts with a goal of understanding the needs of their employee population as a whole. In doing so, they often learn that optimizing the employee experience cannot be achieved with a single broad-brush strategy. They then become more focused on understanding the unique needs of particular employee segments, including those who identify as LGBT+. But this will be true only if the organization has already put in place a cohesive talent management plan in which diversity and inclusion are clearly linked to business success. Organizations will not derive significant benefits if they introduce these ideas in a survey without first defining the connections to a broader business strategy.

Organizations should expect employees to have a wide range of opinions and responses to conversations and initiatives about this constituency. Employees will notice if LGBT+ concerns are introduced in survey content, but may react negatively if the survey content seems out of sync with the way LGBT+ issues are handled in the larger organization. This is a sensitive topic for some people, and negative feedback and reactions can come from clients or employees who are, for various reasons, not aligned with LGBT+ concerns. Feedback from those who object because of religious or moral objections may help to broaden the conversation and ultimately help the organization enhance their diversity and inclusion initiatives.

To help bring all employees along as partners in this journey, it is a best practice to address these potential concerns up front. Organizations may have support groups (for example, ERGs), which can help with survey communication and design and encourage survey participation.

Following are some examples of introductory text that can be included prior to the presentation of demographic questions on a survey:

Sample Introductory Text #1

The following questions are being asked to help us better understand your needs. Your participation is voluntary and you do not need to answer any particular question if you do not want to. However, your answers will help us to improve our working environment. All answers will be kept confidential. Any answer you do provide will not be directly attributable to you. If you need any support to complete the survey because of a disability or if you would like to discuss anything further, please speak directly with your local Human Resources representative.

Sample Introductory Text #2

The following questions are voluntary and are being asked so that we can determine if employee groups differ in their perceptions of the organization and to identify any areas of concern. Please feel free to skip these questions if you would prefer not to answer them. Responses to these questions will be used to analyze differences between employee groups for the organization overall. The confidentiality of your individual responses will be protected.

Sample Introductory Text #3

We are committed to maintaining a workplace culture that values diversity. Completion of the questions in this section is voluntary. You can skip any question or select the option “prefer not to say”. The data collected will be used only to help develop initiatives and actions within our diversity focus areas. Data will be treated in the strictest confidence, and all the responses will be stored and processed by our survey services partner. The results will be reported for the overall organization level and for larger divisions. Data will be aggregated when reported; no individual responses will be reported.

Regardless of the specific language chosen in the introductory text, it is important to emphasize the following:

- Participation is voluntary. Items should be defined in such a way that employees can choose not to respond to questions but can still keep moving through the survey to respond to other content. Both the survey wording and the technological infrastructure of the survey should allow questions to be skipped.
- Responses on the basis of LGBT+ self-identification will not be included in manager reports and will be used only at the group or aggregate level to help the organization make strategic decisions.
- All survey questions are carefully selected. Issues that address LGBT+ concerns are included to help the organization provide a positive work experience for all employees.

It is also important for organizations to consult with their Human Resources, Corporate Social Responsibility, Ethics and Marketing departments to ensure that the survey work complements strategic efforts that may be underway in those parts of the business.

Global considerations

Given the sensitivity of LGBT+ data, there are significant variations by country regarding how survey questions of interest to this employee group should be defined. Legal advice is always necessary to ensure that any such questions in a survey are legally acceptable.

Some countries limit the use of such questions. In other countries, it is illegal to include such questions. For instance, France prohibits the inclusion of any LGBT+ questions on a survey, while the United Kingdom limits the use of such questions.

In many countries homosexuality is illegal. Additionally, there are some countries where there are no laws protecting members of the LGBT+ community from discrimination. In these countries, the inclusion of LGBT+ questions on a survey is not recommended.

Organizations should always consult with their legal advisors to determine what is legally and culturally permissible.

Organizations may deploy customized survey versions in order to include LGBT+ questions only in countries in which they are permitted. However, any analyses involving the LGBT+ questions would need to be conducted within the particular countries surveyed and would not necessarily be representative of an organization's international workforce.

Summary

Organizations seeking ways to drive incremental business value should optimize all talent, including LGBT+ employees. This requires understanding the unique experience of LGBT+ employees in order to develop supportive workplace strategies. Organizations may use a variety of employee listening techniques to derive those insights.

As this paper shows, it is important to understand the relevant practical, social, cultural, and legal implications of including LGBT+ content within engagement surveys. We recommend including such content on surveys in countries where it is legally permissible to do so and in organizations that have already initiated organization-wide diversity and inclusion efforts. Data from employee surveys can serve as an informational tool to let the organization know whether or not their current inclusion initiatives are working. Customized and targeted action planning initiatives can be created based on the survey results to increase engagement, improve the employee experience, and bolster business outcomes.

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Notes

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