A close-up, slightly blurred photograph of several rainbow flags being held up by people at what appears to be a pride parade or event. The flags are vibrant with the traditional six colors of the rainbow: red, orange, yellow, green, blue, and purple. The background is out of focus, showing more flags and the silhouettes of people.

Supporting the journey **Gender transition in the global workplace**

A best practices study based
on IBM's comprehensive approach



*“We are standing together,
shoulder to shoulder, all
working for one common good.
And the good of each of us as
individuals affects the greater
good of the company.”*

— Thomas Watson, Sr., Chairman and CEO, IBM, 1914-1956

IBM and the Human Rights Campaign (HRC)

The **Human Rights Campaign** (HRC) Foundation's Workplace Equality Program strives to advance lesbian, gay, bisexual, transgender and queer (LGBTQ) equality at work and create workplaces free from discrimination.

Advancing workplace equality for LGBTQ employees means looking far beyond the employee handbook—it means putting policy into practice on the factory floor, in the corporate boardroom and everywhere in between. HRC's

Workplace Equality Program is the nationally recognized voice for advocacy, information and guidance on LGBTQ workplace issues.

International Business Machines Corporation (IBM) is an American multinational technology company and one of the world's largest Information Technology sector employers, with more than 375,000 employees worldwide.

Recognized as a global thought leader in the development and implementation of Lesbian, Gay, Bisexual and Transgender (LGBT+)¹ inclusive programs and

policies, IBM is committed to providing a safe, open and inclusive working environment for all of its employees across the globe.

IBM has included gender identity protections in its Equal Opportunity Policy since 2002 and has proactively helped dozens of transgender IBMers successfully transition on the job.

HRC's Workplace Equality Program is the **nationally recognized voice for advocacy,** information and guidance on LGBTQ workplace issues.

IBM's commitment to diversity

"IBM thinks about diversity the way we think about innovation—both are essential to the success of our business. When we innovate, technology becomes smarter

for clients and creates new opportunities for growth. When we incorporate diversity into our business, we create better innovations and outcomes. IBM has

embraced diversity, and it gives opportunities for IBMers and our clients to achieve their full potential."



Virginia M. Rometty,
Chairman, President and
Chief Executive Officer, IBM

IBM and the HRC's Corporate Equality Index

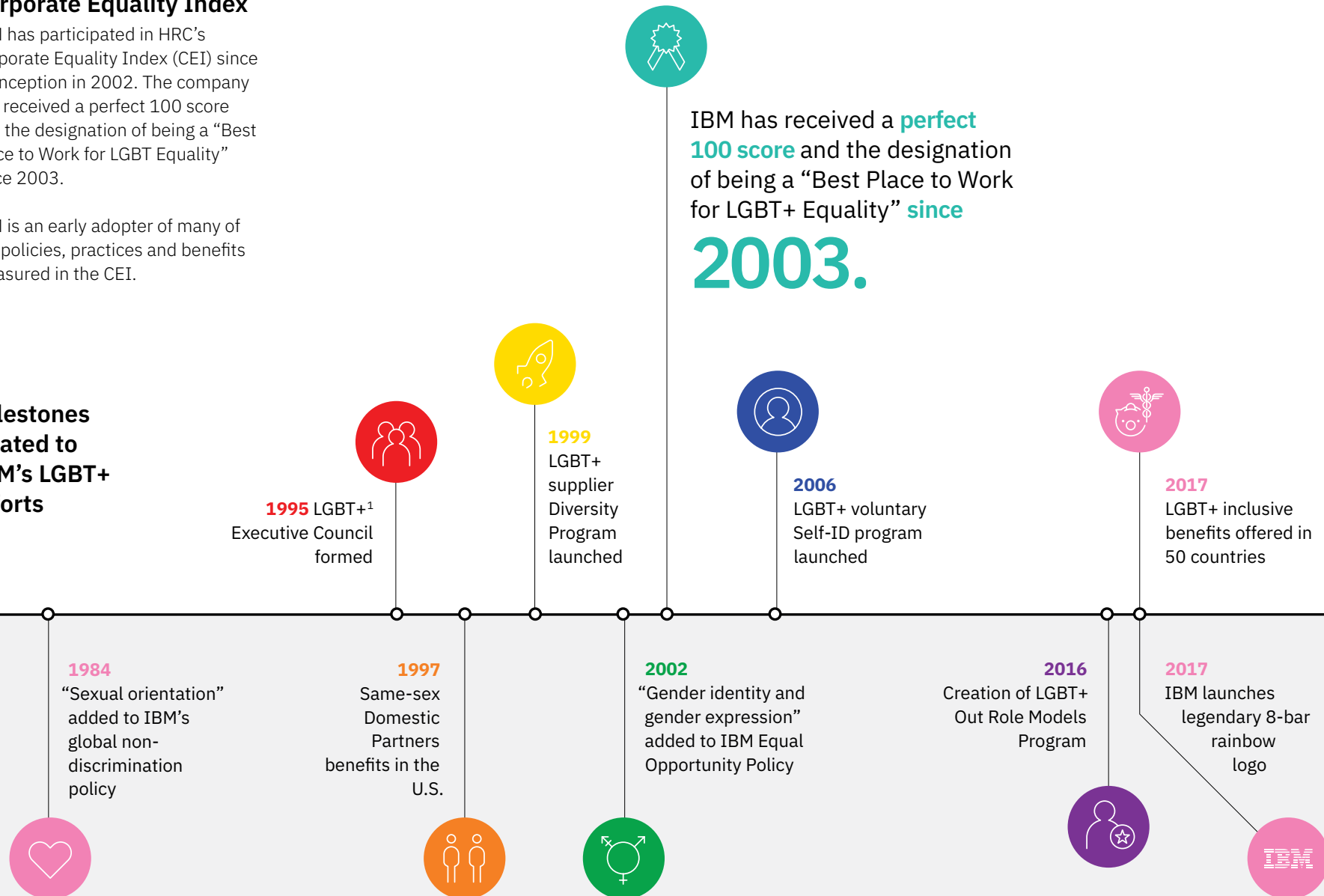
IBM has participated in HRC's Corporate Equality Index (CEI) since its inception in 2002. The company has received a perfect 100 score and the designation of being a "Best Place to Work for LGBT Equality" since 2003.

IBM is an early adopter of many of the policies, practices and benefits measured in the CEI.

IBM has received a **perfect 100 score** and the designation of being a "Best Place to Work for LGBT+ Equality" **since**

2003.

Milestones related to IBM's LGBT+ efforts





Legendary pride

On January 6, 2017 IBM announced a new symbol of IBM's LGBT+ leadership — a rainbow adaptation of the iconic 8-bar corporate logo, inspired by the late Gilbert Baker's rainbow flag.



The challenge

For over 15 years, the HRC has benchmarked corporate America's progress in adopting transgender-inclusive policies, practices and benefits through its annual [Corporate Equality Index](#)² survey and report. With education and guidance from HRC, hundreds of major employers have implemented inclusive policies and benefits for their transgender or transitioning employees. But these crucial foundations represent just the beginning of the work needed to ensure that everyone feels valued in the workplace.

It is well documented that transgender people experience disproportionately high rates of unemployment and underemployment,³ making it incumbent upon advocates and employers to collectively translate inclusive policies into tangible opportunities for transgender workers. People charged with implementing these critical policies in the day-to-day workplace environment—human resources, line managers and executives, diversity and inclusion professionals, and colleagues of transgender workers—need practical guidance on how to make workplaces more welcoming and supportive.

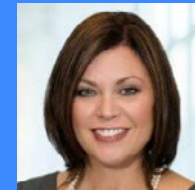
A comprehensive solution: proactive planning for success

IBM's new learning and development modules to support on-the-job gender transition, entitled *Helping Transgender Employees Make the Transition at Work*, reflect a comprehensive approach to supporting transitioning employees. The modules represent a best-in-class framework addressing the common experiences that employees transitioning at work face, while acknowledging the individuality of every transitioning employee.

It is often said that when a person transitions, everyone around them transitions as well. Business leaders know the importance of proper planning, communication and training in implementing successful organizational change. A successful gender transition is no different. A little planning can go a long way to ensure a successful outcome for all involved: the transitioning employee as well as their manager, colleagues, clients and customers.

It is often said
that when a
person transitions,
everyone around
them transitions
as well.

"For us at IBM, it's about full inclusion and making sure that from a value system standpoint there is a really consistent drumbeat all over the world. We started to look at how we can do more. How can we push the envelope to be more inclusive? You always have to be committed to learning and growing at all times."



Deb Bubb,
HR VP and Chief Leadership,
Learning & Inclusion Officer, IBM

IBM's "Supporting the journey: Transition in the global workplace"

A best-in-class approach

IBM's comprehensive and thoughtful global workplace transition framework guides and supports an employee's entire gender transition journey — for the manager, their colleagues and work team, HR support staff and business line executives, as well as the employee themselves.

Often referred to as "gender transition guidelines," IBM's workplace transition framework is designed to be an accessible resource for employees and managers and an integral part of IBM's existing, holistic LGBT+ inclusion learning collection of offerings.

Existing LGBT+ Learning & Education Framework

The existing LGBT+ inclusion learning and education framework sits in IBM's Leadership Academy, a global resource for online learning accessible to all IBMers. Founded on the philosophy that IBM's strength derives from IBMers, the courses rely on the voices and stories of IBMers. The courses on LGBT+ inclusion include:

- **LGBT+: Leading Inclusively:** This course educates managers and employees on the LGBT+ community including IBM policies, practices and expectations. Among other resources, it includes a short video entitled Reflections of IBM Inclusion, which showcases four engaging IBMers who are members of the LGBT+ Community.

- **Transgender: Leading Inclusively:**

This course educates managers and employees on the greater transgender and gender nonconforming community as well as IBM policies, practices and expectations. Included here are concepts, terminology and background on the current challenges faced by the community as well as an instructive story of a transgender IBMer's chance meeting with a former colleague.

- **Becoming an LGBT+ Ally:** This course includes a set of modules to educate LGBT+ Allies on issues affecting the LGBT+ community as well as specific behaviors they can adopt to help create more welcoming and inclusive spaces —

at work, at home and in the community. Upon completion of the learning modules, allies can pledge to actively engage their ally-ship at IBM.

- **Common Terms to Discuss Gender:**

This course is a primer of terms and concepts related to gender identity and expression.

"I am a former marine, an activist for LGBT, especially transgender rights, I have a family, I bike a lot, I build models with my son... and I am a technical seller for IBM. That's my life.

When I was hired, the people that were recommending me and the people that were hiring me, knew that I was transgender. They'd known me before my transition.

It's important for people to live in an environment where they are not afraid of being

who they are, and they are not afraid of speaking their mind. Not every place in the world is like that, and not every company is like that. I feel completely accepted here."



Connie Rice, Leesburg VA,
Client Technical Sales
Specialist, IBM

New course to support transitioning employees

A new course entitled *Helping Transgender Employees Make the Transition at Work* is fully integrated with existing courses and accessible in appropriate geographies. The course was developed with a cross-functional team approach, relies significantly on the real-world experience of transgender IBMers, and includes recognized best-in-class policies and procedures from internal and external subject matter experts:

- IBM internal team
- IBM Transgender employees who acted as consultants
- Diversity & Inclusion including LGBT+ Global Inclusion Leaders
- Human Resources including experts on IBM's LGBT+ inclusive policies and benefits
- Learning & Development including Instructional Design experts
- Benefits and Integrated Health Services teams
- Legal review to ensure compliance
- External partners

Materials from external partners such as HRC, PFLAG, Stonewall UK and others were utilized to ensure up-to-date information on the transgender community as well as alignment with recognized best-in-class policies and practices.

Helping Transgender Employees Make the Transition at Work

The course is organized across four sections:

1. Introduction

- Advises that the module was designed for a global audience and is based on global, corporate policies. Clarifies that some content may not be applicable in every country, and IBM operations and IBMer interactions must be consistent with IBM global policies and local laws.
- Reiterates IBM's commitment to transgender employees and provides an overview of the course
- Requires employee consent and emphasizes the importance of confidentiality before any steps are taken to facilitate the employee's transition

2. Preparation

- Provides a brief refresher of key terms and concepts surrounding gender identity and gender transition
- Provides an overview of the necessary steps to create an individualized transition plan including but not limited to pathways for disclosure or engaging others, creating a timeline, and communications strategies
- Maintains necessary flexibility in the approach to the transition plan. Allows for differing circumstances, needs and desires of individual transgender employees

3. Workshop

- Includes educational materials, including a set of videos and a presentation to be used as a flexible framework for training and support for the transitioning employee's manager and work group
- Includes guidance for communicating with clients for transgender employees in client-facing roles

- Includes transgender IBMers telling their own personal stories set to engaging animated scenes. The videos are designed for managers to watch in preparation for the workshop and for colleagues to view afterward. The five videos are:
 1. The Transgender Journey
 2. Helping Those Who Are Transitioning
 3. Issues
 4. Common Mistakes and How to Avoid Them
 5. Chance Encounters
- An accompanying presentation is ready to support managers (partnered with an experienced LGBT+ global diversity leader) in educating colleagues and work teams.

4. Support

- Outlines steps for monitoring and checking progress
- Provides practical guidance for managers on monitoring the workplace for micro aggressions, and ensuring ongoing opportunities to provide feedback

“IBM has a rich history of diversity and inclusion — it’s in our DNA. Each generation of leaders has addressed the diversity and inclusion issues of their time, and so it is not surprising that in 2002 IBM recognized the need to address gender identity and expression in our equal opportunity policy, and then evolved our benefits, management training and workplace practices to stand by and support employees who transition. We are proud of the holistic and flexible approach we designed.”

— Diane Gherson, Senior Vice President, HR, IBM

| | | |
|---|---|--|
| Respect for the transitioning employee | <p>Consent must be obtained from the transitioning employee before a team can be assembled to assist or begin planning.</p> <p>Privacy is emphasized and the employee is involved in the planning process.</p> | <p>It is the employee's transition. All transitions are unique and the employee's voice must be considered and heard.</p> |
| Personal storytelling | <p>Five short videos use the voices and stories of transgender IBMers to highlight real-life experiences of working and transitioning at IBM.</p> <p>Letting IBMers who have experienced transition tell their stories reflects a commitment to authenticity and enables understanding and connection.</p> | <p>Many people do not personally know (or don't know that they know) a transgender person. This lack of familiarity means people often rely on stereotypes and misconceptions about the community, which can lead to misunderstanding and even discrimination.</p> <p>The stories help break down stereotypes and misconceptions allowing for greater personal connection.</p> <p>These stories help build greater understanding and rapport, critical to creating more welcoming workplace cultures and effective work teams.</p> |
| Scalable and accessible | <p>Housed within IBM's global "Leadership Academy," the modules are available to IBMers in appropriate geographies around the globe.</p> <p>The entire LGBT+ learning system, including the Transitioning in the Workplace modules, sits alongside all other leadership development materials within IBM's platform.</p> <p>Keyword searches return the entire course series to the user.</p> | <p>With today's highly dispersed workforces, scaling any HR solution is challenging and critical. IBM's processes must be robust enough to communicate complex information across a diverse workforce, yet remain scalable to a global audience.</p> <p>Accessibility and transparency are also important. With a quick keyword search, a transgender person who is unsure whether or not it is safe to come out as their authentic self at work will be comforted in seeing the robust LGBT+ content on the Leadership Academy. Similarly, someone who manages or works with a transitioning employee now has easy access to a wealth of tools and resources for learning and understanding, aimed at making transitioning safe and respectful across working groups.</p> <p>Additionally, housing LGBT+ content alongside all other development materials affirms the company's commitment to inclusion across the spectrum of workforce diversity.</p> |
| Practical and flexible | <p>IBM's "Transitioning at Work" modules contain practical guidance on the entire process of supporting a transgender employee, including a pathway map for stakeholder engagement, sample transition timelines, and communications plans for managers, colleagues and even clients.</p> <p>At the same time, the guide repeatedly acknowledges the need for flexibility in approaching any individual person's transitioning process and allows for necessary flexibility.</p> <p>Lastly, the workshop materials include practical examples of micro aggressions and other expressions of bias, as well as tools for managers and colleagues to address these unwelcome behaviors.</p> | <p>Training and education in transgender inclusion and issues of gender identity and expression can seem overwhelming. For many diversity and HR practitioners, it is sometimes hard to know where to start.</p> <p>For transgender inclusion efforts, many people require a baseline level of information, including basic concepts and terminology, often referred to as "Trans 101." It's important, however, to embody a holistic approach that moves beyond concepts and terminology to clearly delineate any relevant workplace policies as well as give practical guidance on acceptable and unacceptable behaviors. Bringing these concepts to life helps managers and employees truly understand and support their transitioning colleagues.</p> <p>As every transgender person's transition and needs are unique to them, guidance needs to be flexible enough to tailor to the specific needs of a transitioning employee, while specific enough to provide a consistent framework that eliminates confusion and potential mismanagement.</p> |

| | | |
|----------------------------------|--|--|
| Ready to deploy resources | <p>The workshop section of the “Transitioning” module includes pre-approved content for manager and work team training. The transitioning employee may review and make appropriate changes to the training framework to reflect individual preference and circumstances.</p> <p>Managers will be paired with an experienced LGBT+ Global Diversity Leader to deliver the training content, ensuring necessary subject matter expertise.</p> | <p>Proactive planning ensures managers and diversity professionals have the tools necessary to educate work teams and other stakeholders.</p> <p>By creating educational resources that are ready to deploy, IBM positions its leaders to focus on a successful outcome, anticipating any anxiety that work teams or stakeholders might have about the unknown.</p> |
| Iterative | <p>The project team is committed to continuous improvement through an iterative process based on user feedback. As on-the-job transitions take place, the LGBT+ Global Inclusion Leaders will capture feedback from user groups—transitioning employees, managers, work teams and so on—as part of the improvement process.</p> <p>All documents and materials are “living” on IBM’s intranet Leadership Academy and open to the Global Diversity & Inclusion team for updating as needed.</p> | <p>The conversation around gender identity and expression continues to grow and expand, meaning some concepts and vocabulary grow, change and expand as well. Additionally, the legal landscape surrounding the rights of transgender people continues to evolve here in the US as well as around the globe.</p> <p>A well-designed, nimble solution allows for timely updates and content refreshers based on emerging conversation, changing laws and evolving best practices.</p> |

What makes IBM’s approach best in class?

The following attributes are elements in the evaluation of IBM’s new gender transition guidelines solution and its consideration as best in class:

- Respect for the transitioning employee and their preferences in facilitating their transition drives every step in the process
- Use of personal storytelling
- Ensuring scalability and accessibility
- Practical yet flexible guidance
- Iterative model
- Ready-to-deploy resources

“We can help other people to understand that equality, acceptance and mutual respect are all about being a human being.”

— Bruno Di Leo, Senior Vice President, Global Markets, IBM

The business case for transgender inclusion

IBM, like many businesses, seeks to foster a diverse and inclusive workplace that aligns with its commitment to fundamental fairness and inclusion — policies that are not only the right thing to do but are also good for business. **By promoting and championing diversity, IBM positions itself to attract and retain the best talent and create a highly productive environment** where people are free to bring their whole selves to work.

Attract and retain talent

Human capital is often a company's most valuable asset, and attracting and retaining the best talent is mission-critical in today's competitive landscape. Employers who value and embrace diversity through their policies and benefits signal to potential recruits, current employees, consumers and investors their commitment to fundamental fairness. In essence, they are welcoming talent from everyone, and have done the work to ensure that all employees know that the essential elements that comprise their identity are acknowledged and valued.

Workplaces infused with cultural competency and awareness around diversity and inclusion across a multitude of categories—race, gender, national origin, religion, age, ability, veteran status, sexual orientation, gender identity, gender expression — not only solidify their commitment to fairness, but build loyalty and productivity within their ranks.

Boost engagement and productivity

In today's highly competitive business landscape, businesses need all of their employees fully engaged and productive on the job. According to the HRC Foundation's workplace climate report

*The Cost of the Closet and Rewards of Inclusion*⁴—a study of the national picture of LGBT workers' experiences of inclusion on the job as contrasting with the perceptions of their non-LGBT co-workers — **employee engagement suffers by up to 30 percent in unwelcoming environments** where LGBT employees experience a negative workplace environment or feel compelled to stay in the closet. Employers committed to transgender-inclusive workplaces can expect higher levels of engagement and loyalty from their transgender employees and their allies. Additionally, by providing transgender-inclusive health care coverage, an employer fulfills the corporate goal of employer provided health insurance: to ensure a healthy and productive workforce.



Transgender inclusion in the workplace: HRC tracks progress over time

The Human Rights Campaign Foundation's annual [Corporate Equality Index \(CEI\)](#)⁵ is a national benchmarking survey and report on policies and benefits for lesbian, gay, bisexual, transgender and queer employees, launched in 2002. Designed with transparent, fair, and attainable standards, the first CEI in 2002 had just 13 businesses earning a perfect rating. But by the recent 2018 report, reflective of the most stringent criteria to date, 609 major employers earned a 100 percent score and the distinction of being a "Best Places to Work for LGBTQ Equality." The CEI raised the profile of LGBTQ employees and their

families' needs with respect to employer-provided health care coverage, workplace protections, and a number of relevant policies and practices for the LGBTQ workforce. Since 2002, the competition among the nation's largest private sector businesses to be an employer of choice for the LGBTQ community has been tremendous.

Several measures in the CEI specifically address concerns of transgender and gender non-conforming employees: a non-discrimination policy with protections based on gender identity, the availability of transgender-inclusive health care coverage, and internal and external initiatives such as inclusive diversity training to address cultural competency around gender identity and expression. These measures related to transgender inclusion have seen the most significant progress in the CEI's 16-year history.

Since 2006, the CEI has asked about the availability of transgender-inclusive health care coverage, but it wasn't until the 2012 CEI that it became a requirement to have at least one firm-wide health care plan that included transition-related care to earn a score of 100 percent. Over the last ten years, the HRC Foundation partnered with hundreds of major businesses participating in the CEI to change market standards for employer-provided health insurance coverage for transgender people. The 2018 CEI report includes a record-

breaking 750 employers—79 percent of the rated companies—that specifically include coverage for transgender health care in at least one of their employer-provided plans. The growing trend is undeniable as forward-thinking employers embrace equal access to health care coverage that addresses specific needs across the full-spectrum of their workforces.

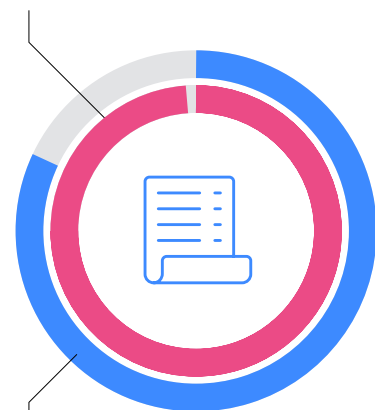
From its inception in 2002, the CEI criterion required employers to provide fundamental workplace protections for transgender employees by including gender identity in their non-discrimination policies to score 100 percent. In the latest CEI report for 2018, 82 percent of all Fortune 500 companies and 99 percent of the 947 CEI-participating businesses include these fundamental protections in their non-discrimination policies.

Furthermore, more than eight in ten of CEI-rated businesses offer robust diversity and inclusion programs that specifically include training on gender identity. Today, hundreds of employers also equip managers with "gender transition guidelines," a set of considerations and protocols for transitioning employees. Over 450 major employers reported the implementation of these guidelines in the 2018 CEI.

2018 inclusion of fundamental protections in company non-discrimination policies

99%

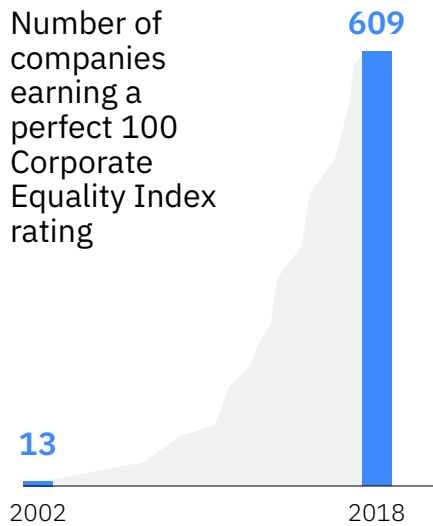
of the 947 CEI-participating businesses



82%

of all Fortune 500 companies

Number of companies earning a perfect 100 Corporate Equality Index rating



Moving ahead: additional resources for employers

HRC's trans toolkit for employers

With this paper, IBM and HRC together hope to illuminate key best practices in making workplaces more welcoming to transgender employees. We understand that not every company will have the resources and bandwidth to create their own framework from scratch.

HRC has created *Transgender Inclusion in the Workplace: A Toolkit for Employers*, a comprehensive resource including sample policies, guidelines and even scenario-based learning modules. Housed on HRC's website at www.hrc.org/transtoolkit, the toolkit includes a series of five videos that employers are free to use to elevate transgender stories and bring the issues to life.

Additionally, HRC's Workplace Equality Program is available for consultation at cei@hrc.org.

For more information

To learn more about IBM's LGBT+ Inclusive Learning Solutions please contact:

Kimberly Messer

IBM Business Development Executive,
IBM Global Markets
kdmesser@ca.ibm.com



About the Human Rights Campaign and the Human Rights Campaign Foundation

The Human Rights Campaign and the Human Rights Campaign Foundation together serve as America's largest civil rights organization working to achieve lesbian, gay, bisexual, transgender and queer (LGBTQ) equality. By inspiring and engaging individuals and communities, HRC strives to end discrimination against LGBTQ people and realize a world that achieves fundamental fairness and equality for all.

The Human Rights Campaign envisions a world where lesbian, gay, bisexual, transgender and queer people are ensured equality and embraced as full members of society at home, at work and in every community.



About the authors

Beck Bailey

Deputy Director of
Employee Engagement

Beck Bailey is the Deputy Director of the Workplace Equality Program where he focuses on helping America's workplaces become more LGBTQ-inclusive through employee engagement, training and education. He also conducts outreach to engage corporations in supporting legislative action to create workplace protections for LGBTQ people. As a life-long business professional prior to joining HRC, Beck brings his knowledge and experience as a change management leader to this work. An LGBTQ advocate and out transgender man, he often speaks about his personal experience as a way to increase awareness and understanding.

Beck holds a BS in Management from Virginia Tech and an MBA from the Isenberg School of Management at UMass Amherst.

Liz Cooper

Associate Director of
Corporate Programs

Liz Cooper joined the Workplace Equality Program in 2010. As Associate Director, Liz engages directly with employers to identify and improve LGBTQ-inclusive policies and practices. Liz brings her background in sales marketing research to develop the Program's resources on LGBTQ diversity and inclusion best practices aimed at employers, employees, and consumers. She has a special focus on engaging new businesses to participate in the CEI survey, and also oversees the annual Buying for Workplace Equality Guide. In addition, Liz has enlisted the support of dozens of major businesses for pro-equality legislation across the country. She also uses her advocacy to help elevate the role of allies in the LGBTQ community. By making allies a more visible part of the workforce, Liz hopes to make a fully inclusive culture the new standard for employers, allowing employees to be authentic and open in their workplace environment.

Liz holds a bachelor's degree in Political Science from Davidson College in North Carolina and is currently pursuing her MA in Writing from Johns Hopkins University.

Sponsored by:

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Special thank you to:

Rosalia Thomas— Director of Diversity, Terri Stein— Legal Counsel, Casey Garhart— IBM Learning, Scott Stroud— Content Design, and Joy Dettorre— Global Diversity for their guidance, expertise and knowledge during the creation of this report. Designed by Scott Stroud.



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1 We understand that there are variations in the acronym used to represent the greater lesbian, gay, bisexual, transgender and queer (LGBTQ) community. We use "LGBT+" when referencing IBM's efforts as that is how the company refers to the community, and "LGBTQ" for HRC efforts as that is how HRC refers to the community. We recognize that other organizations may include variations of this acronym, such as "LGBT" or another variation.

2 HRC's Corporate Equality Index can be found at www.hrc.org/cei

3 James, S. E., Herman, J. L., Rankin, S., Keisling, M., Mottet, L., & Anafi, M. (2016). The Report of the 2015 U.S. Transgender Survey. Washington, DC: National Center for Transgender Equality. www.ustranssurvey.org/

4 Read "The Cost of the Closet and the Rewards of Inclusion: Why the Workplace Environment for LGBT People Matters to Employers" at www.hrc.org/climate

5 HRC's Corporate Equality Index can be found at www.hrc.org/cei