



THE SOUTH AFRICAN WORKPLACE EQUALITY INDEX

Creating LGBT+ Inclusive Workplaces

A PRACTICAL FRAMEWORK FOR EMPLOYERS

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About this Document

With the inaugural South African Workplace Equality Index (SAWEI) launching imminently, this publication is intended to get companies thinking about LGBT+ inclusion in their company. We encourage all confirmed and future participants in the index to review our advice and guidelines to prepare themselves for their submission to the SAWEI.

This publication contains our position on best practice for LGBT+ workplace inclusion and introduces organisations to the framework that will structure the inaugural SAWEI. A separate set of guidance notes for completing a SAWEI submission will be sent to participants and will be downloadable from our website.

Do not hesitate to contact us at SAWEI@lgbtforum.org or education@lgbtforum.org, if you have more questions after reading this publication.

1. Key Definitions

adapted from the [Human Rights Campaign](#)

Ally: A person who is not LGBT+ but shows support for LGBT+ people and promotes equality in a variety of ways

Cis-gender: Where a person's gender identity and biological sex is aligned – the opposite to transgender

Gender expression: External appearance or presentation of one's gender identity, usually expressed through behaviour, clothing, haircut or voice, and which may or may not conform to socially defined characteristics typically associated with being either masculine or feminine

Gender identity: One's innermost concept of self as male, female, a blend of both or neither – how individuals perceive themselves and what they call themselves. One's gender identity can be the same or different from their sex assigned at birth

Heteronormativity: Denoting or relating to a world view that promotes heterosexuality as the normal or preferred sexual orientation

LGBT+: An acronym for “lesbian, gay, bisexual, transgender, plus”, the “plus/+” is an all-encompassing term including a range of sexual and gender identities such as intersex, asexual, pansexual, queer, questioning and others

Sexual orientation: An inherent or immutable enduring emotional, romantic or sexual attraction to other people

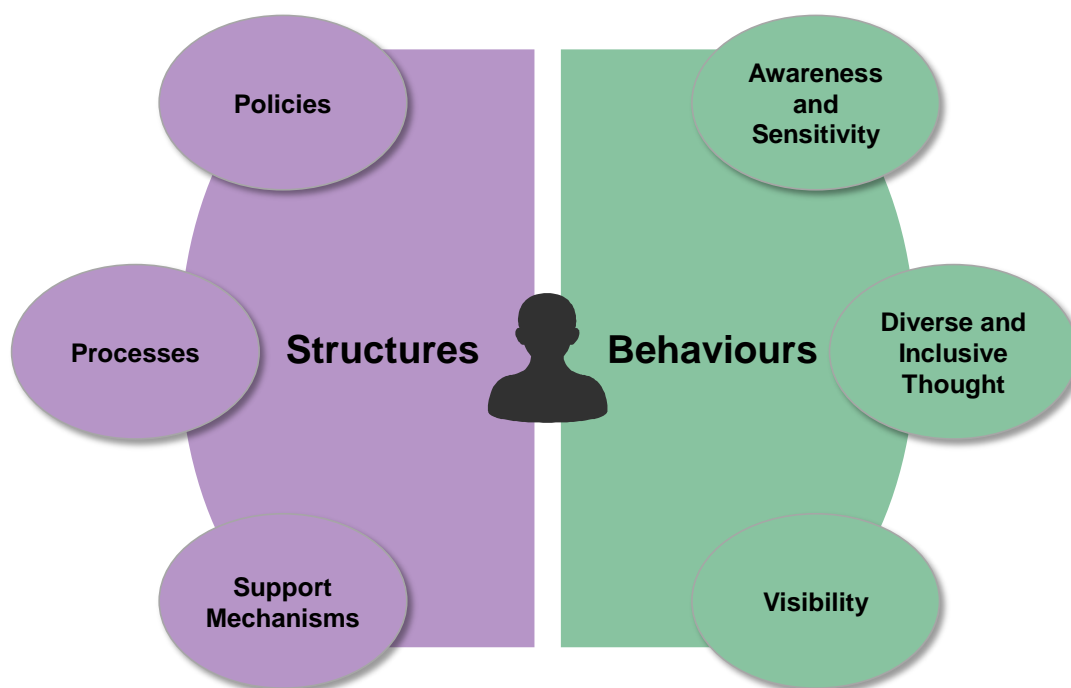
Transgender: An umbrella term for people whose gender identity and/or expression is different from cultural expectations based on the sex they were assigned at birth. Being transgender does not imply any specific sexual orientation

2. Introduction to the Framework

The South African Workplace Equality Index (SAWEI) will be launched in 2018 and aims to be the pre-eminent benchmark against which employers based in South Africa can measure their level of LGBT+ inclusiveness. In preparation for the SAWEI launch, the South African LGBT+ Management Forum (or “The Forum”) has developed this guide on what constitutes best practice in LGBT+ workplace inclusion.

The structure of this publication mirrors the types of question that will be asked in the SAWEI and introduces employers to a simple framework. The framework is based on years of collective experience about the characteristics of inclusive organisations and research on similar benchmarks worldwide. We found however that there was no overarching framework allowing companies to structure their approach to equality and inclusion in the workplace, and we hope that this framework can be used as a practical tool.

Figure 1: The Forum Approach to LGBT+ Inclusion in the Workplace



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The framework consists of six elements that we believe constitute inclusive workplaces. It is based on the duality between the “structures” within a company and the “behaviours” of the people within the company. Our experience over the years, across sectors, has highlighted that true inclusion needs both of these aspects. On the one hand, structures are those company-wide elements that can be designed, built and measured, and nearly always require investment (both time and financial). It is often this aspect that companies focus on precisely because they *can* be designed top-down. The outcome and return of building structures is quite tangible (i.e. there is a new policy, a group, or a new process) and it is therefore easy to report progress back to the company.

However, structures on their own cannot create inclusion. Just because a supermarket chain, for example, has policies that address discrimination and have invested into an employee network at Head Office, this does not mean that the day-to-day experience of a cashier or packer on the shop floor is inclusive and LGBT+ friendly. This is why behaviours are critical. By behaviours we mean the culture, values and everyday actions of the individuals that make up “a company”. Unfortunately, this is where most companies that we speak to struggle to make progress. It is easy to write a policy, it is more challenging to create an environment where LGBT+ people can speak openly about their same-sex partners or where LGBT+ people have senior role models that inspire them.

The duality of the framework is important. Structures and behaviours are mutually reinforcing; for example, clearly defined anti-discrimination policy helps to define the boundaries of acceptable behaviour, and the right behaviours help to shape the ethos of policies and processes of a company. Furthermore, neither can exist in isolation. Structures that create a semblance of “inclusion” will be doomed to fail and cultures that are not supported by structures are weak when it really matters.

Figure 2 overleaf further defines what we mean by each of the six elements of the framework and the broad types of questions that companies ought to be asking themselves. These questions form the foundation for the SAWEI.



Figure 2: Guiding Questions of The Forum Framework

	Element	Guiding Question	Dimensions
Structures	Policies	• Does the company have policies in place that will protect and nurture LGBT+ employees?	<ul style="list-style-type: none"> • HR policy • Working abroad • Procurement
	Processes	• Does the company have processes that are inclusive and considerate of the needs of LGBT+ people?	<ul style="list-style-type: none"> • Recruitment • Monitoring • Escalation
	Support Mechanisms	• Does the company have mechanisms or groups specifically designed to support LGBT+ employees?	<ul style="list-style-type: none"> • Employee networks • Counselling • Mentoring
Behaviours	Awareness and Sensitivity	• Are all employees trained and aware of issues facing LGBT+ people?	<ul style="list-style-type: none"> • Diversity training • Communications
	Diverse and Inclusive Thought	• Do employees respect and value diversity of thought across all aspects of identity?	<ul style="list-style-type: none"> • Culture • Employment equity • Community engagement
	Visibility	• Are LGBT+ people visible within the company?	<ul style="list-style-type: none"> • Role models • Openness • Career development

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We encourage all companies to be thinking about inclusivity through these six elements. Indeed, whilst the framework has been developed specifically with LGBT+ employees in mind, we also encourage companies to apply this to gender, race, disability, mental health and other intersections of our diverse workforce. It is important to elevate thinking beyond compliance and policy to create true inclusion in the workplace.

2. Guidance on Best Practice

In supporting companies on the journey of creating more LGBT-inclusive workplaces, we have identified best practice against each element of our framework. This is not an all-inclusive list, it merely serves as a guide for those companies participating, or considering participating, in the SAWEI.

The Forum has already published resources about a number of topics on our [website](#) and would advise that you consult these publications also, in particular:

- Why Set Up an LGBT+ Employee Network in South Africa: The Business Case Summary
- Strengthening LGBT+ Rights in the South African Workplace: A Legal Handbook for Employees and Employers
- Creating an LGBT+ Employee Network in South Africa: Ten Tips for Being Best in Class

Furthermore, many of our international friends ([Stonewall](#) in the UK, [Pride in Diversity](#) in Australia, [Workplace Pride](#) in The Netherlands, and [Pride at Work](#) in Canada) have written high-quality resources for their respective regions. Lastly, peer-to-peer learning is a great way to circulate best practice and The Forum will soon be establishing a timetable of events for companies to share ideas. For now, we share our thoughts of best practice as it applies to the SAWEI. This year's survey will address all elements but through approximately 12 questions only, which may expand as the SAWEI develops.

Element 1: Policies

This element refers to the policies written, communicated and implemented by the company to ensure that LGBT+ employees are protected and that the company can run smoothly. The challenge is to ensure that all company policies are inclusive and sensitive to LGBT+ people, as opposed to specific policies singling out LGBT+ people in particular.

- HR policy
 - A zero-tolerance approach towards discrimination against LGBT+ people at all levels of the organisation
 - New parent leave policy for same-sex parents which includes parental leave, adoption leave, surrogacy, foster parent leave
 - Transition support, health benefits and medical leave for trans employees

- Equal extension of benefits to same-sex life partners as opposite sex life partners or spouses, e.g. healthcare packages, travel and relocation, superannuation/death benefits, pensions, insurance
- Provision for LGBT-sensitive mental health support and HIV counselling and guidance
- Definitions in HR policy that are inclusive of LGBT+ partners and families and have removed “heteronormative” language, e.g. partner/spouse, parent/carer
- **Working abroad**
 - Clearly-defined policies and a position on employees working in countries where homosexuality is illegal, in particular policies must cover:
 - The right to opt-out of being posted to a country where there is a danger because of sexuality or gender identity, without fear of adverse impact on career progression
 - The company’s response in the event of exposure
 - A clear position on LGBT+ rights in the markets in which the company is operating
- **Procurement**
 - Procurement decisions based on commitment to diversity, for example B-BBEE scores and commitments to equality
 - Cross-collaborative events with suppliers or customers

Element 2: Processes

This element refers to the key day-to-day activities, mostly by the HR or transformation team that support the people aspects of the business; often these processes are governed by the policies above.

- **Recruiting**
 - Targeted recruitment events for LGBT+ graduates, especially at underrepresented universities
 - Publically available links to internet pages and social media pages about company diversity and policies on anti-discrimination
- **Monitoring**
 - Tracking the numbers of LGBT+ people within the organisation, which can be done upon entrance (and in the process of recruitment), during, or exit
 - A dedicated HR person leading diversity in South or Southern Africa or a head of transformation where LGBT+ is included in this mandate or job description
 - Analysis of wide-ranging employee surveys (e.g. “Pulse”/engagement surveys, employment equity surveys) along the lines of gender, race, and sexual orientation

- **Escalation**
 - A clearly defined process for escalating instances of workplace bullying or harassment
 - A clearly defined process for escalating instances of discriminatory or unequal HR policy treatment
 - Adherence to the escalation process and disciplinary action for instances where escalation should have, but did not, occur

Element 3: Support Mechanisms

This element refers to how LGBT+ employees are supported in the workplace, particularly at pivotal moments such as coming out, relationship challenges, career building/promotion, etc. These support mechanisms must also be inclusive of non-LGBT+ people who may also be experiencing challenges such as children/relatives/friends coming out or facing discrimination.

- **Employee networks**
 - An active LGBT+ employee network group; or membership/collaboration with a sector-wide group if the company is very small
 - The network has a defined budget and visible senior leadership
 - The network is fully inclusive with a mandate that extends to “allies” and employees that do not define as LGBT+ (e.g. straight parents of LGBT+ children, straight allies)
 - The network is itself diverse, reflecting levels of seniority, race, business units, age etc.
 - There is a conscious effort to include groups that experience notably higher levels of discrimination (e.g. trans people, black lesbians)
 - The network is open for employees outside of South Africa, especially for countries that are less accepting (e.g. in the Middle East, Rest of Africa)
 - Employees’ work and engagement with the network is recognised
 - The successes of the network are celebrated
- **Counselling and support**
 - Clearly advertised and signposted routes for employees to report abuse or harassment through dedicated HR persons, the LGBT+ employee network, dedicated points of contact, or a confidential hotline
 - Counselling support and advice available for employees with LGBT+ children, friends or family members

Element 4: Awareness and Sensitivity

This element refers to how individuals within the company are sensitised to LGBT+ matters, recognise that there is strength in diversity and understand the importance of using appropriate terminology. Understanding different people's perspectives and using a common language helps to shape inclusive behaviour.

- **Diversity training**
 - All HR persons are knowledgeable about LGBT+ matters, including the difference between biological sex, sexual orientation, gender identity, and gender expression
 - All HR persons are knowledgeable about handling sensitive information relating to sexual orientation and gender identity
 - Information about sexual orientation and gender identity provided to all new employees within the context of diversity, either as a message from a senior leader or through an introduction session
 - A programme to raise awareness on diversity, inclusion and values is run and participation is strongly-encouraged
 - Recent research published in the Harvard Business Review highlights that compulsory training does not necessarily have the desired impact therefore we advise making such sessions voluntary but strongly encouraged – see Dobbin and Kalev in recommended reading section
 - Programmes should encourage a reflection of everyone's own diverse intersectional identity: e.g. "Does a person of Indian origin prefer to be referred to as "Indian" or "Black" or another definition? Does an outwardly female employee prefer use of the pronouns "Her/She/Hers"?"
 - Line managers receive handbooks on issues of diversity, with explicit reference to Employment Equity, gender, disability and LGBT+ issues
 - Employees have an awareness of gender diversity and the challenges experienced by transgender and/or transitioning employees
- **Communications**
 - External and internal statements of a company's commitment to inclusion of sexual orientation and gender identity are distributed to employees at all levels (e.g. in annual reports, investor presentations)
 - Promotion of LGBT+ equality by senior leadership outside of the HR department
 - Promotion of LGBT+ oriented events (e.g. International Day Against Homophobia and Transphobia, LGBT History Month, Pride, Transgender Day of Remembrance) or including LGBT+ issues when marking South African holidays such as Human Rights Day
 - Promotion and championing of the LGBT+ employee network, if one exists

Element 5: Diverse and Inclusive Thought

This element refers to how a company's culture respects alternative perspectives, ideas and thoughts, often strengthening performance. Diversity should not be about forcing together people with different races, genders, or sexuality etc. but about dismantling echo chambers caused by sameness.

- **Culture.**
 - An inclusive culture can take many forms but may have the following characteristics:
 - Emphasis on respect and inclusion rather than simply diversity
 - Values that embody equality, inclusion, and dignity
 - Expectations of fairness and opportunity for all employees
 - A common purpose, in that two people may hold divergent beliefs but are nonetheless bound by that purpose at work
 - Use of inclusive/non-heteronormative language in everyday interactions (regardless of whether the interaction involves someone defining as LGBT+):
 - Usage of "spouse", "significant other", "partner"
 - Discouragement of derogatory jokes or terms, e.g. "gay lifestyle", "life choices", "tranny", "ungqingil", "moffie", "dyke"
 - Discouragement of gossip about sexual orientation or gender identity and expression about colleagues
 - Engagement without awkwardness: e.g. asking about an employee's same-sex partner, asking about a weekend, sharing and empathising about life experiences
- **Employment equity**
 - Inclusion of an LGBT+ representative on the Employment Equity forum
 - A recurring agenda item in all Employment Equity forums that relates to being LGBT+ in the workplace
- **Community and market engagement**
 - Committed support to organisations that support LGBT+ persons in the community, e.g. youth education on issues of sexual orientation and gender identity, financial or pro-bono support of organisations promoting LGBT+ causes
 - Linking financial support of LGBT+ organisations or initiatives to social and economic development B-BBEE spend
 - For B2C businesses, advertising campaigns that actively address sexual orientation and gender identity (e.g. featuring same-sex couples in TV commercials)
 - For B2C businesses, marketing campaigns that actively target LGBT+ persons with positive messaging (e.g. advertising in gay media or at Pride)

Element 6: Visibility

This element refers to building organisations where difference is not obscured for the sake of political correctness or for employees to “fit in”. It recognises the importance of role models in organisations and an open culture where visible diversity is part of everyday life.

- **Role models**
 - Board, Executive or Senior Managers that are LGBT+ and comfortably out in the workplace
 - Leadership that actively and regularly champions LGBT+ equality across legal jurisdictions and across all levels of the organisation
- **Openness**
 - Email signatures that mark an LGBT+ event or indicating support for the LGBT+ network or equality
 - Email signatures that state preferred pronouns (e.g. “She/Her/Hers”)
- **Career development**
 - Supporting leaders to engage with LGBT+ professional organisations, e.g. Out and Equal, The South African LGBT+ Management Forum
 - Mentoring programmes between junior LGBT + employees and senior LGBT+ employees
 - Reverse mentoring between LGBT+ employees and non-LGBT+ leaders

Closing Remarks

Over time, our definition of best practice will evolve as companies in South Africa become more mature in their approach towards LGBT+ inclusion and as organisations innovate. We are looking forward to launching the first ever LGBT+ workplace benchmark in Africa and in supporting your company on its journey to creating a more inclusive, supportive and therefore high performing workplace.



3. Recommended Reading

Dobbin, F. and Kalev, A. (2016), "Why Diversity Programs Fail". Harvard Business Review, July-August 2016. Available at: <https://hbr.org/2016/07/why-diversity-programs-fail>

Human Rights Campaign (2014), "The Cost of the Closet and the Rewards of Inclusion". Available at: http://hrc-assets.s3-website-us-east-1.amazonaws.com//files/assets/resources/Cost_of_the_Closet_May2014.pdf

Human Rights Campaign (2016), "The Way Forward" (webinar series), available at: <http://www.hrc.org/campaigns/the-look-forward>

Open for Business (2015), "The Economic and Business Case for Global LGB&T Inclusion". Available at: https://www.open-for-business.org/wp-content/uploads/2016/01/Brunswick_Open_for_Business_full.pdf

Open for Business (2018), "Strengthening the Economic Case". Available at: <https://www.open-for-business.org/the-economic-case/>

Stonewall (2014), "Line Managers; How to Manage a Diverse Workforce." Available at: http://www.stonewall.org.uk/sites/default/files/line_managers.pdf

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United Nations Human Rights (2017), "Tackling Discrimination against Lesbian, Gay, Bi, Trans, & Intersex People: Standards of Conduct for Business". Available at: <https://www.unfe.org/standards/>

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