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PHILIPPINE FINANCIAL &  
INTER-INDUSTRY PRIDE

# PFIP PLAYBOOK

for **LGBT+ Inclusive Workplaces in the Philippines**





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# Message from PFIP

In 2021, the Philippine Financial & Inter-Industry Pride (PFIP) completed a Workplace Inclusion Survey with insights from over 100 companies across 22 industries, representing PFIP's then more than 50-strong roster of member organizations. The survey presented factual and promising entry points for the thrust towards inclusive workplaces. 86%—almost 9 in 10—of respondent organizations have policies in place to address incidents of workplace discrimination on the basis of sexual orientation and gender identity and expression. Moreover, 88% of these companies publicly declared their support for LGBT+ inclusion. True to this commitment, 70% advocates and supports activities for the LGBT+ community.

The message is unmistakable—the Filipino workplace is ready for transformation towards meaningful inclusion beyond optics. A rising number of local industry leaders have initiated reforms in their respective organizations with practical, strategic, and sustainable policies and programs to ensure that every team member can come to the workplace as their true and authentic selves without fear of discrimination.

Recognizing opportunities and strong support for LGBT+ inclusion in the local corporate landscape, the **PFIP Playbook for LGBT+ Inclusive Workplaces in the Philippines** was developed to capacitate even more companies to start reforms in their own organizations. The prevailing business climate might leave organizations with some hesitation to make new investments and explore fresh directions. The PFIP Playbook builds on the shared experiences of more than 40 leaders in management roles and employee relations groups. Not only is inclusion “acceptable,” it is good for business with various research and business cases that have proven how workplace inclusion increases productivity and performance in achieving business goals. In addition, the potential to respond innovatively to new business challenges.

The Playbook has clear guidelines for organizations according to the level of maturity of their LGBT+ inclusion strategies, from those in the early stages of their inclusion journey to those looking to expand and extend their tried and tested practices. The Playbook spotlights best practices led by managers and instituted by organizations looked up to as exemplars in industry and advocacy circles alike. In addition, a new four-tier inclusion framework is introduced as part of the Playbook—a reflection guide and workbook for organizations seeking to revisit their current host of strategies, identify what they are already doing right, and build on these in rolling initiatives.

Readers of the Playbook are invited to take this resource, take their next committed actions for inclusion, and inspire peers to do the same. PFIP welcomes exchanges of these experiences and learnings from this Playbook.

**Weena Ekid**

Chair

Philippine Financial & Inter-Industry Pride



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PHILIPPINE FINANCIAL &  
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## About PFIP

The Philippine Financial & Inter-Industry Pride (PFIP) traces its beginnings to a casual lunch meeting back in 2013 among Executives and Pride leaders representing five organizations (Thomson Reuters, HSBC, Deutsche Bank, ANZ, and Wells Fargo). Then called Philippine Financial Institutions Pride, the organization targeted multinational companies with DEI or Diversity, Equity, and Inclusion already embedded in their values. The challenge was to make their DEI practices aligned with Philippine culture.

LGBT+ movements in the Philippines have typically been represented by “activists in the streets.” PFIP’s leaders, less recognized until now, are the “activists in the boardroom,” shifting cultures and consciousness in business discourses. There have been Pride networks in the local business communities that mostly focus on activities and events for visibility. PFIP recognized opportunities to move beyond optics, with a thrust towards capacitating organizations towards meaningful inclusion, starting with assisting companies as they institute partner benefits for LGBTQ+ employees to facilitating SOGIESC training.

An American executive envisioned having an all-Filipino leadership for PFIP. This is now a reality, with more than 80 member organizations. PFIP’s reputation was built on the determination of its founding members to consolidate proven best practices of Pride communities in the workplace.

# The PFIP Workplace Inclusion Survey

The survey started with getting a pulse of the level of inclusivity in the Philippine workplace. In October 2021, PFIP conducted the first-ever LGBT+ workplace inclusion survey in the Philippines. The 2021 Philippines LGBT+ Workplace Inclusion Survey covered six key facets of inclusivity in companies conducted by PFIP:

1. Inclusive policies
2. Inclusive benefits
3. Organizational support
4. Technology for inclusion
5. Education and enablement
6. Social responsibility and thought leadership

The survey serves as a baselining tool for companies starting with their LGBT+ inclusivity journey and a benchmarking tool for companies that have already embedded LGBT+ inclusivity in their workplace. It shows a clear picture of what action is being taken and what else needs to be done by companies to promote LGBT+ inclusivity in the workplace.

The survey results serve as the foundation of the PFIP Playbook. From this concrete data, the PFIP Playbook was developed with a laser focus on the best practices in fostering inclusion and equity for LGBT+ employees.

## About the PFIP Playbook

Initiatives to benchmark inclusion must give due respect to the unique ecosystem in an organization. Various frameworks have been forwarded, each with its salient strengths and limitations. It is tricky to impose upon organizations a stringent, unyielding yardstick with which they can gauge if they are “doing enough” to drive inclusion.

What this Playbook offers is an opportunity for organizations to reflect, find what they are doing right, be acquainted with their capacities and resources, and resolve that they can do more.

This Playbook is a self-learning and training tool to help PFIP members drive LGBT+ diversity and inclusion in the workplace. It captures findings from interviews with more than 70 Pride leaders and advocates, representing over 30 organizations.

This Playbook began as an invitation for leaders to share best practices in alignment with the eventual goal of transforming the workplace, starting within their spheres of influence. The invitation continues for more organizations to reflect on their respective transformation journeys and build on what has been started by PFIP's Pride Champions.



# Who can use the Playbook

This Playbook is for employees and employers alike of PFIP member companies, specifically those with formal roles in driving inclusion, as well as those who are determined to be more actively involved. Notably, these include:

- Executives,
- Human Resources and Administration Managers,
- Line Managers, and
- Employee Resources Group (ERG) leaders.

## Rationale for the Playbook

The Philippine legal, political, and cultural context presents unique challenges to LGBT+ inclusion. An opportunity is presented to organizations. Businesses have the resources to encourage innovation. With the shifting understanding of workspaces and rules of dealing with actors across value chains, businesses can become venues of social transformation.

The Philippine Financial & Inter-Industry Pride's (PFIP) leadership, as well as its member institutions, have, in various capacities, proven their commitment to contributing to a more diverse and open society, starting with the workplace.

## How to use this Playbook

The Playbook is organized into three sections: **GETTING STARTED**, **TAKING ACTION**, and **SCALING UP**.

In the first section, **GETTING STARTED**, a simple self-assessment tool is provided to help you reflect on your organization's LGBT+ inclusion journey. This section will help you identify areas where your organization already seems to be working well and areas where there are opportunities for development.

The second section, **TAKING ACTION**, provides recommended actions on how to grow in specific aspects of operations that need attention. It also includes best practices from PFIP members that could be useful to you.

The third section is about **SCALING UP**. This is a continuing challenge for organizations that have solidified their commitment to inclusion and have established good practices. Through communications strategies, in both internal- and external-facing contexts, they can weave inclusion into their organization's identity. From a firm set of values and reputation as Pride leaders, they can rally more partners to the advocacy of inclusion like other actors in their value chains, in their respective industries, and even outside of business communities.





# GETTING STARTED

There are three concrete steps to start the journey toward an LGBT+ inclusive workplace:

1. Assess your PRIDE
  2. Secure PRIDE support from the executive leadership team
  3. Develop your PRIDE strategy
-



## GETTING STARTED

# 1 Assess Your PRIDE

Having a clear assessment of the workplace climate on LGBT+ inclusivity helps provide focal areas for the company to improve. Workplace climate assessments often serve as discussion points in introducing LGBT+ inclusion. This Playbook presents five entry points of inclusion.

### Answer these questions to get started:

- **Policy:** Is there a company policy framework (either global or local) mandating or encouraging LGBT+ inclusion in the workplace?
- **People:** Is there an existing organized network group for LGBT+ employees?
- **Leaders:** Do leaders and executives actively promote LGBT+ inclusion?
- **Resources:** Do organized groups have access and control over resources they can utilize to forward inclusion?
- **Activities:** Is there a sustained implementation and conduct of LGBT+ inclusive activities and interventions in the workplace?

### Methods for conducting Pride Assessment:

1. **Review internal DEI company policies.** Directives and policies from global headquarters on the inclusive workplace can leverage the business case in driving LGBT+ inclusion. If this is available, one can assess how this global directive can be applied in the local company context.
2. **Conduct surveys.** Include inclusion index specific to LGBT+ in annual employee surveys. The following sensing questions can be considered by companies in developing period employee surveys:

- *This company fosters a workplace that allows employees to be themselves at work without fear.*
- *This company has done a good job providing educational programs that promote diversity, equity, and inclusion in our workplace.*
- *This company takes active measures to seek a diverse candidate pool when hiring.*
- *Employees of different backgrounds are treated fairly in the internal promotion process.*
- *I am aware of and understand the procedures for reporting incidents of discrimination and/or bias in the workplace.*

Organizations can also reach out to the roster of employees through a general survey with targeted questions on the experiences of LGBT+ employees in the workplace, with an option for anonymous submission if employees do not feel comfortable disclosing their SOGIESC. For more guidance, see our complete sample survey template in the Resources portion of the Playbook.

- 3. Reach out to LGBT+ Employees (lived experience).** LGBT+ employees must be front and center in driving inclusion. The most effective and efficient way of doing this is by consulting them. One possible entry point is tapping into the company's network group of LGBT+ employees. If the company does not have an organized group yet, organizations can also reach out to self-identified LGBT+ employees to engage them in a conversation about their workplace experiences. Please be reminded that employees will openly share their experiences if they feel they are accorded a safe space.

After assessing your company's workplace climate on LGBT+ inclusivity, you can now identify strategic priorities and develop an action plan. You may refer to Section 2 of this Playbook for taking action

Alternatively, you may share your assessment results with PFIP to find opportunities for leveling up.



## GETTING STARTED

# 2 Secure PRIDE Support From The Executive Leadership Team

Another entry point is the executive leadership team's support. Securing the buy-in of the executive leadership team is critical to making LGBT+ inclusivity in the workplace a true strategic business imperative.

When there is executive buy-in, there is a high probability that LGBT+ inclusivity will be embedded in the overall business strategy and aligned with the company's vision, mission, and value statements. Their support is vital because they influence decisions and approve plans, whether appropriating budget for your LGBT+ inclusivity programs, endorsing your roadmap to business units, requiring LGBT+ metrics to be part of KPIs, aligning HR policies and programs with LGBT+ inclusivity priorities, and driving inclusive behavior.

### **A three-pronged approach is recommended to secure leadership support:**

#### **1. Map stakeholders and identify your senior champion.**

To have a dedicated person in the executive committee formally recognized as an LGBT+ champion, map your stakeholders first to see who fits the bill. Consider the following in choosing your LGBT+ champion:

- Leaders who have a personal reason to get involved or have a personal story to tell,
- Leaders who are in a position to make decisions regarding employee policies, and
- Leaders who have a large sphere of influence internally and externally.

**NOTE: While having leaders who self-identify as LGBT+ as your senior champion is ideal, not all organizations have these.**

## 2. Define the role of and upskill your identified senior champion.

### **Roles of the LGBT+ senior champion:**

- Advocate for the needs of the LGBT+ community at the board level
- Ensure LGBT+ lens is applied in board decision-making
- Participate in network groups' meetings and LGBT+ events
- Brand ambassador of LGBT+ inclusivity

### **Upskilling your LGBT+ senior champion:**

- Ensure completion of LGBT+ Inclusivity Training Plan for Leaders
- Share lived experiences of employees through reverse mentoring
- Provide them with relevant materials that deepen their understanding on LGBT+ inclusivity
- Invite them to networking events
- Get invited to LGBT+ network group meetings

## 3. Build a business case and present it to the executive committee.

Your LGBT+ senior champion is your ticket to gaining support from the executive leadership team. They must be well-versed in your business case. Your business case should be tailored-fit to the type of industry you belong to and aligned with the priorities of the leaders you are presenting the case to.

Most organizations that participated in the KII mentioned that they consulted PFIP on how to build their business case. These business cases are grounded on moral, legal, and business imperatives.

Data, critical incidents, and tangible impact should back up your business case to make it more solid.

### SPOTLIGHT

## **Securing PRIDE Support from leaders**

Securing the buy-in of the executive leadership team is a key success factor to IBM Philippines' robust LGBT+ DEI culture in the workplace.

In 2015, Jeiz and her partner Steph, both IBMers, considered settling down. Knowing that there are no benefits for LGBT+ domestic partners, they, together with some members of the Employee Alliance for Gay and Lesbian Empowerment (EAGLE), advocated that benefits given to heterosexual married couples be equally provided to same-sex domestic partners.

**SPOTLIGHT****Securing PRIDE Support from leaders**

They reached out to the global team and engaged with their senior leaders. They also organized programs that increased the awareness of the senior managers, including the country HR leader, on the lived experiences of the LGBT+ community. They presented a business case using their personal story, discussing the cost of the closet and why it's important for managers to be allies. This was concluded by engaging the managers for their ideas, asking "What can we all do to make IBM much more inclusive to our LGBT+ employees?" By putting a face to the struggle, surfacing the potential returns of equality, and engaging managers who have the influence, the senior leaders realized how they could unlock the power of inclusion.

Today, the LGBT+ community in IBM Philippines shares that "all benefits married people get, LGBT+ employees with domestic partners get." It does not end with health and insurance benefits; it also covers leaves, emergency loans, relocation packages, and more.





## GETTING STARTED

### 3 Develop Your PRIDE Strategy

After assessing your workplace climate and securing executive leadership buy-in, you are now ready to develop your PRIDE Strategy. Your PRIDE Strategy should be aligned with the company's vision, mission, and value statements and help improve the overall organizational performance. It includes your LGBT+ inclusivity commitments, targets, roadmap, and resources needed.

Most companies align their DEI strategies with their global ones and adjust these based on the local context. DEI is reflected in most value statements under the value of respect and diversity. More advanced companies have LGBT-specific DEI embedded in their strategies and organizational values, and an intersectional approach to their DEI strategy is evident.

In these early stages, start small. Prioritize goals based on the opportunity areas identified during your self-assessment.

#### SPOTLIGHT

### Developing PRIDE strategy

CBRE Group is a global commercial real estate service and investment firm. The office in the Philippines has advanced 4Is, an imperative framework aligned with the global HQ's three pillars (Culture, Talent, & Marketplace), namely:

1. **Inclusive climate**
2. **Intensify workforce diversity**
3. **Inculcate awareness**
4. **Invite diverse suppliers**

**SPOTLIGHT****Developing PRIDE strategy**

From this framework, issues related to underrepresented groups in the company, such as women, differently-abled persons, senior citizens, and LGBT+ employees, were discussed. Initially, the management challenged the 4Is framework as the global strategy already includes the three pillars. For the management, the interests of the mentioned underrepresented groups are already captured by the global strategy. However, the Philippine DEI council of CBRE argued that the said framework was crafted to tailor fit the Philippine context and address the specific needs and everyday realities of these marginalized groups. The Philippine DEI council convinced the management to implement programs that strengthen the DEI system/culture in CBRE. Recently, the DEI council launched Bahaghari, the LGBT+ ERG in the company.

Policies and procedures are in place to drive an inclusive workplace. Demographics, the percentage of leadership positions, percentage of hire, etc. are collected through their dashboard or manually tracked. The report serves as their benchmark for evaluating their strategies and determining what aspects are still missing. They have data on gender ratio, women and LGBT+ in leadership, strategic initiatives focused on PWD and LGBT+ hiring and internship, unconscious bias training completion, DEI & Community Events Survey Scope, and LGBT+ specific employee benefits.

On recruitment, the CBRE talent acquisition team conducts different sourcing activities specific to LGBTQ+ and PWD and determines recruitment portals that specifically cater to these groups to help provide employment opportunities. CBRE also partners with PFIP in identifying dissemination platforms that can reach the members of the LGBT community. Meanwhile, during onboarding, CBRE talents will be matched with the sectors they resonate with. New hires attend mandatory training; supplementary training includes awareness on DEI, LGBT+, and SOGIE.

Groundwork takes at least six months:

**0-3 months:** Formation of the council, presentation to the leaders, creating and localizing the framework

**4-6 months:** Policy creation, program development and partnership with other departments

They launched the framework during the first three months to increase awareness. They reviewed their progress versus targets set every month. They used their internal diversity metrics to evaluate their strategies and determine what aspects need greater attention.



# TAKING ACTION

Now that executive support has been secured and strategies are in place, your organization is in an excellent position to launch initiatives. This section walks you through the five entry points of inclusion and provides a practical guide on embedding and strengthening LGBT+ inclusion. It builds on PFIP's 2021 LGBT+ Workplace Inclusion Survey, which identifies companies' critical success factors and opportunities for improvement that help drive LGBT+ inclusivity.

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## TAKING ACTION

# 1 Policy

An inclusive workplace recognizes the socio-economic and politico-cultural dynamics that govern the lives of LGBT+ employees (e.g., economic marginalization of LGBT+ workers, the unequal share of care and domestic work, and hostile political/cultural climate surrounding the lives of LGBT+ employees). Such considerations influence LGBT+ employees' experience in the workplace. Inclusive institutions promote and enforce policies that address these realities, particularly concerning underserved and vulnerable groups, i.e., the LGBT+.

According to the 2021 PFIP Survey, 86% of the respondent companies have SOGIE-based anti-discrimination policies. 88% of the respondents mentioned that they have procedures in place to enable LGBT+ employees to raise concerns regarding discrimination in the workplace. These policies help LGBT+ employees feel supported and empowered at work to be their whole selves.

**In taking action, the following steps may guide the company in transforming its HR resources policies and procedures to make them genuinely equitable and inclusive:**

1. **Consult LGBT+ employees.** The HR should consult the company's LGBT+ employees (or the ERG) about their practical<sup>1</sup> and strategic<sup>2</sup> needs for them to bring their "authentic" selves to work. This consultation needs to highlight the importance of employee-led policies and procedures.
2. **Utilize the framework and strategy** developed in the previous section. They should guide the company's LGBT+DEI policies.
3. **Codify policies.** Codifying LGBT+DEI policies is crucial in fostering an inclusive workplace. Such action provides employees with a general feel of how inclusive their workplace is, consequently shaping how comfortable and open they will be within this setup. Codifying also underscores sustainability. Personnel (HR, DEI focal person, executives, etc.) may change, but policies (provided they remain in place) will continue to guide inclusive practices and norms in the workplace.

<sup>1</sup> Practical needs tend to be immediate and short-term needs, i.e., food, housing, income, health (Moser, 1989). These needs can be addressed by the provision of specific inputs, food, additional income, insurance, etc.

<sup>2</sup> Strategic needs tend to be long-term needs and they relate to the group's disadvantaged and subordinate position (Moser, 1989). These needs may be related to lack of resources, education, vulnerability to poverty and violence. Provision of specific services may not be enough to address these needs.

## Some areas to consider when formulating LGBT+DEI policies:

### A. Recruitment process and onboarding.

A genuinely inclusive workplace considers and ensures that the LGBT+ community is welcomed and sought after ahead of the hiring processes

#### **How to do this:**

*HR is encouraged to create a diverse hiring strategy incorporating LGBT+ targeting. Firms can likewise set targets and promotion quotas to quantify and also serve as a concrete commitment to bring in multi-perspective potential employees. These quotas are only temporary until such time that equitable outcomes have been achieved: the LGBT+ community is no longer discriminated against, and their disadvantaged position has been addressed. This recruitment policy should be coupled with SOGIESC training/s to address bias and discrimination against LGBT+ employees (onboarding programs).*

### B. Compensation and benefits.

LGBT+ employees and their families have to deal with challenges that come with a lack of social and legal recognition of their family arrangements. In the absence of state support for LGBT families and carers, organizations have the opportunity to step up and devise workarounds to ensure the provision of care for the health and medical needs of partners and extend this to childcare.

#### **How to do this:**

1. *Gather data (in alignment with data privacy law) to determine the needs and other support required by your LGBT+ employees to function effectively in the workplace.*
2. *Review workplace practices and your benefit offerings. Mind the gaps between what you have and the support (in terms of compensation and benefits) needed by your LGBT+ employees. For example, does the company's benefits policy cover health insurance for LGBT+ employees and their families? Does your LGBT+ (particularly trans employees) workforce have equal access to medical coverage vis-à-vis their hetero counterparts?*
3. *Enhance your compensation and benefits package, reflecting the gaps and exclusions learned from the previous step.*

### C. Well-being interventions.

DEI is intrinsically linked with health and well-being. The diverse communities within a workforce necessitate employers to advance a segmented approach to health and well-being strategy. Due to cultural and legal barriers, LGBT+ employees suffer asymmetrically from health inequality. DEI policies are vital in closing this gap and bringing forward equitable health and well-being strategies.

#### **How to do this:**

1. *Gather data (in alignment with data privacy law) to determine the needs and other support required by your LGBT+ employees to function effectively in the workplace.*
2. *Pay attention to inclusions and exclusions (both content and language) in the coverage of your*

*health and well-being strategies.*

3. *Ensure the strategy takes into account the changes in work setup and the use of technology. For example, due to the ongoing pandemic, there has been an increase in the use of telemedicine.*
4. *Extend intervention support/programs to your LGBT+ employees' families.*

#### **D. Compliance mechanisms.**

A company is a space shared by a community of individuals united by a common goal; this community is often characterized by their varying and intricate needs anchored in the diversity of their identities, including their gender. Policies with clear compliance mechanisms would provide LGBT+ employees with safer workplace climates. Such mechanisms would remedy or discriminate against LGBT+ employees.

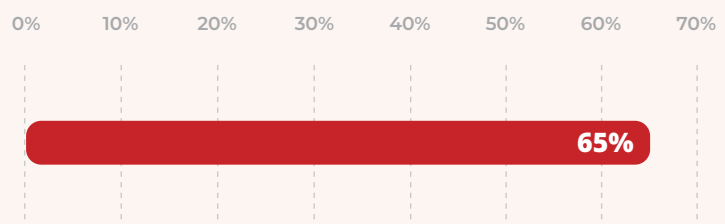
##### **How to do this:**

1. *Set up a third-party arbiter (LGBT-specific) that acts as a multi-expert council to review violations and discriminations in the workplace. This council needs to have a delegated SOGIESC/gender specialist*
2. *Communicate case outcomes across the organization; case outcomes should include the relevant LGBT+DEI policies*
3. *Employ case outcomes in education campaigns*

#### **4. Monitor and evaluate through ERGs the LGBT+DEI policies and their implementation.**

ERGs are employee-led groups whose aim is to foster a diverse and inclusive workplace aligned with the organizations they serve (a more detailed discussion of ERGs can be found in the next section). ERGs should monitor DEI policies and their implementation (through the company's programs and

**With leaders  
accountable for  
delivery of DEI targets**



##### **DID YOU KNOW THAT?**

According to the 2021 PFIP survey, only 65% of the respondents have leaders accountable for the delivery of DEI targets. This is clearly a priority in taking action since what is measured gets done.

projects) consistently. A supportive management committee (ManCom) drives ERGs to be more involved in advancing an inclusive workplace.

#### **5. Put up accountability structures and metrics to complement LGBT+DEI policies.**

Policies can only be effective if there are systems in place to ensure these are being implemented. These accountability structures and metrics systems ensure that LGBT+DEI policies are embedded in the company's operations.

##### ***Some factors to consider:***

- *LGBT+DEI metrics are in place and are part of ESG (Environment, Social, and Governance)/sustainability reports.*
- *Performance evaluation of the board of directors (and other executives) includes LGBT+DEI-specific metrics.*
- *Clear and defined accountability across the organization.*



## TAKING ACTION

### 2 People

LGBT+ employees must take center stage to achieve impactful inclusion. They can lead and support inclusive policy development and lobbying, its implementation, and extension work. One of the best ways to realize this is by having a local LGBT+ network group, or what is more commonly known as an Employee Resource Group (ERG).

An ERG is a group of employees gravitating toward each other because of shared sentiments. It may be something that started organically with a group that realized they could instill positive change in their workplace and then, later on, reached out to leaders and executives. On the other hand, it may also be a formal structure organized by the management.

ERGs are important entities within an organization whose objectives coincide with the corporate DEI frameworks. So when LGBT+ employees formally band together as an ERG, they gain management support and access to DEI resources. In addition, a robust LGBT+ network group is vital in an organization's transformation journey; they can be partners towards realizing business objectives, more so when such partnerships are genuinely consultative. However, the PFIP Inclusion Survey found that 40% of companies have yet to establish an LGBT+ network for their employees. While there is no blanket approach to forming an ERG, the following steps can guide you in organizing your LGBT+ network of employees:

#### 1. Reach out to Gatekeepers.

Each company has different rules on organizing employee resource groups, so reach out to people with authoritative knowledge on this. They can be anyone from the HR division or a DEI personnel who can provide technical guidance. Simultaneously, connect with employees who might be interested in joining an LGBT+ network group or those who can connect to them. They can be self-identified LGBT+ employees and leaders or their allies. It is important to begin by communicating to gatekeepers the goal of organizing LGBT+ employees into a formal and recognized group and the positive impact it hopes to realize.

#### 2. Convene interested individuals.

When assembling those who signified interest, make sure to present a general overview of the shared experiences of LGBT+ in the workplace and instill how formally coming together can create the inclusive change they envision. In this gathering, executives and DEI leaders can already signify their support to boost the enthusiasm of LGBT+ employees. Emphasize how collective action and concerted effort create a more powerful impact towards LGBT+ inclusion in the workplace.



### 3. Ensure access to resources and support from management.

Achieving employee-led inclusion is only possible if DEI network groups have resources to utilize for their activities and initiatives. In some organizations, ERGs secure executive sponsors who can present their case to the management level and access funding. Management support can also come from executive-level leaders driving inclusion by engaging with LGBT+ network groups to champion their needs. In addition, multinational corporations with DEI mandates from headquarters typically allot a budget for DEI initiatives. LGBT+ network groups can also tap into this resource pool.

### 4. Formalize Engagement.

Once you have a group of individuals who are not just interested but are also committed to getting involved and creating a positive impact on their workplace, it is essential to seal the deal. This usually involves ironing out the structure of the network group, formalizing the roster of members, and developing ERG objectives aligned with the general DEI direction of the company, if there are any. ERGs also vary in structure; some prefer to be non-hierarchical, with an equal co-sharing of power but defined decision-making rules, while others are more vertical and have a set of officers. LGBT+ network groups also meet regularly to discuss and plan activities, including strategies for maintaining a relationship with their executive sponsor.

### 5. Plan and Execute Activities.

Accorded resources and management support, LGBT+ network groups can now turn inclusion aspirations into reality. Activities and proposed interventions must be matched with identified needs and relevant issues for LGBT+ employees in the workplace. Planning can be in the form of creative collaborations among Pride members. Once final, these proposed activities and interventions should be communicated to executive sponsors for approval and funding. ERGs must regularly assess the impact of conducted activities and proposed interventions on the well-being of LGBT+ employees and their contribution to driving inclusion in the workplace.

While employee-led inclusion through ERGs is commendable and worth emulating, it is vital to ensure that technical support is also available in the organization. Therefore, companies prioritizing inclusion must have a **dedicated DEI leader** responsible for ensuring inclusion is embedded in the company's overall operations. This person or team shall work closely with different network groups to develop inclusion strategies. Organizations that include DEI work only as an ad hoc might miss out on many things that can be achieved if they have dedicated personnel or team working full-time to drive inclusion. Ultimately, it is best to have ERGs and DEI leaders working together to create an inclusive workplace.



## TAKING ACTION

### 3 Resources

From promoting employee development and funding diversity initiatives to supporting ERGs, the company's executives must invest time and resources to build a diverse and inclusive organization with a culture that celebrates people's differences. These may be human resources (for example, labor, education, and skills), tangible resources (food, assets, land, or money), or intangible resources (information, political clout, goodwill, or contacts)<sup>3</sup>.

Since most of the member companies of PFIP are multinationals, there are vast resources available that can help local teams grow their initiatives while considering local needs and context of employees. There are established global policies and standards that they can easily adapt to or benchmark against.

PFIP also has a global network that you can tap into for additional resources and support.

#### Key Questions on RESOURCES:

##### 1. What is used (inputs), what is produced (outputs)?

- The goal here is to identify all possible resources (tangible and intangible) that would yield positive outputs i.e., robust Pride ERGs; sustained engagement with LGBT+ employees

##### 2. How are resources mobilized and distributed?

- Very often the distribution of resources is a top-down approach; the executives solely decide the distribution of resources.
- Do organized groups, like ERGs, have access to and control over resources that can be utilized to forward LGBT+ inclusion strategies?

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<sup>3</sup> Kabeer, 1994



### MIND THE GAP

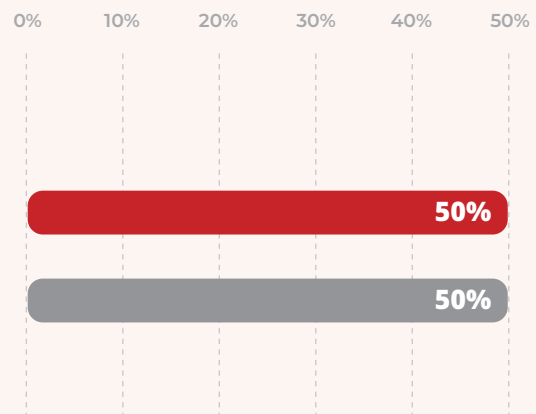
According to PFIP's 2021 LGBT+Workplace Inclusion Survey, there is room for improvement in providing equivalent benefits for same-sex domestic partners and married different-sex couples. Only 50% provide equal benefits in terms of life insurance and 55% consider same-sex partners as immediate family members. Only 30% have implemented at least one transgender-inclusive practice and 17% have gender transition medical-related benefits.

These gaps can be your basis for identifying resources that will help you bridge the gap.

### Provide equivalent non-medical benefits for married different-sex couples and same-sex domestic partners

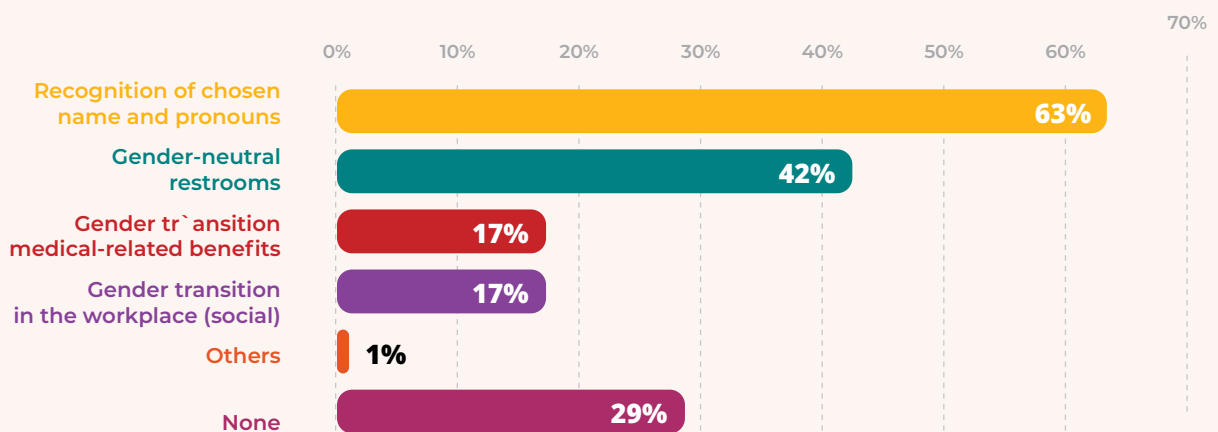
YES ☒

NO ☐



### Transgender-inclusive practices

63% of the respondent companies recognize chosen name and pronouns of transgender employees. However, 29% have yet to implement any transgender-inclusive practice.



ERGs are drivers of inclusion in the workplace. However, for ERGs to be effective in fostering LGBT+ inclusion in the workplace, the company and its executives must buy into them by investing time and resources as well as bringing them into the operational fold. ERGs need access to and control over resources that may be utilized to advance diversity initiatives in the workplace.

### Identify Possible Resources

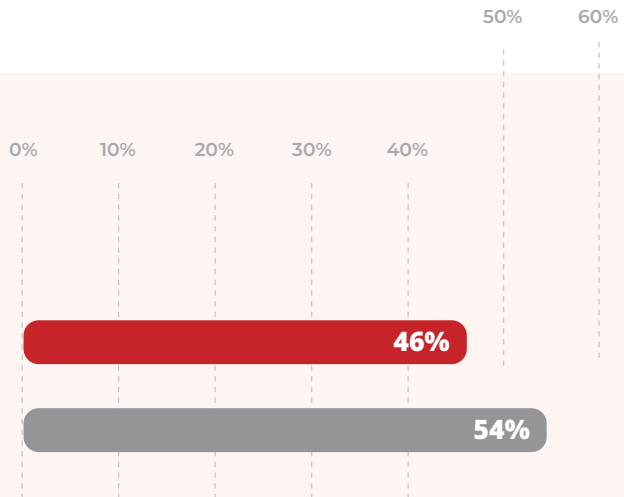
- Physical structures e.g., all-gender restroom/s, all-gender / accessible (for people living with disability) sleeping quarters
- Investments on inclusive benefits e.g., parental leaves for LGBT+ parents, medical and insurance benefits that cover the domestic partner and child/ren of LGBT+ employees
- Inclusive technology e.g., an HR system that is enabled for LGBT+ self-identification, chosen lived name, and pronoun declaration

#### Have an HR system enabled for LGBT+ self-identification and declaration of chosen name and pronoun

YES



NO



#### DID YOU KNOW THAT?

According to the 2021 PFIP survey, only 46% of the respondents have their HR system enabled for LGBT+ self-identification and declaration of chosen name and pronouns.

- Organizational support e.g., a dedicated LGBT+DEI leader accountable for overall strategy, executives and leaders investing their time to drive inclusive culture in the workplace, executives supporting ERGs by providing the latter with its own budget and/or engaging ERGs in decision-making processes
- Inclusive policies e.g., SOGIE-based anti-discrimination policy, mechanisms that would allow LGBT+ employees to raise concerns



## SPOTLIGHT

# Wellness Support for LGBT+ Employees

### SUPPORT FOR GENDER-TRANSITION JOURNEY.

Aside from supporting same-sex couples via domestic partner benefits for HMO and life insurance, Chevron developed an internal guidebook to support their employees who undergo gender transitioning in the workplace – this helps ensure that they provide guidance to supervisors, managers, and teams on the nuances of both social and medical transitioning at work and how they can fully support the employee throughout their transition journey. Through the years, Chevron has leveraged both their internal best practices as well as external benchmarks to ensure that their transgender inclusion practices remain effective and are centered on the employee's wellness.

### VOLUNTEER LEAVE AND SELF-IDENTIFICATION

Employees, LGBT and allies, who support or attend LGBT-related events or activities are given leave compensation by ANZ. If it falls on a weekend, they are given a one-day leave. If it falls on a weekday, it is equivalent to a working day. Starting six years ago until 2019, ANZ employees have been actively participating in Metro Manila Pride March. Whenever they participate, they get a volunteer leave. Further, on self-identification, ANZ employees have the option to change their names in the workplace (how to be addressed), including their name plate at work station, name in email addresses, and preferred prefix in their banking system. Customers can also alter their prefixes and honorifics (e.g., Mx instead of Ms./Mr.).

### PFIP provides the following resources and consultation:

- Policy assessment, review and feedback
- Benefits
- Dress code
- Code of conduct
- Self-identification



## TAKING ACTION

### 4 Leaders

Transforming the workplace into an inclusive one entails meaningful culture shifts. Leaders create culture and can choose whether they want to approach DEI on a superficial or transformative level<sup>4</sup>.

It is essential that leaders fully understand the challenges LGBT+ employees face and the power of LGBT+ inclusivity in unlocking the potential and productivity of the workforce. Building inclusive leadership capabilities is a key success factor in driving inclusion and equity for LGBT+ employees.

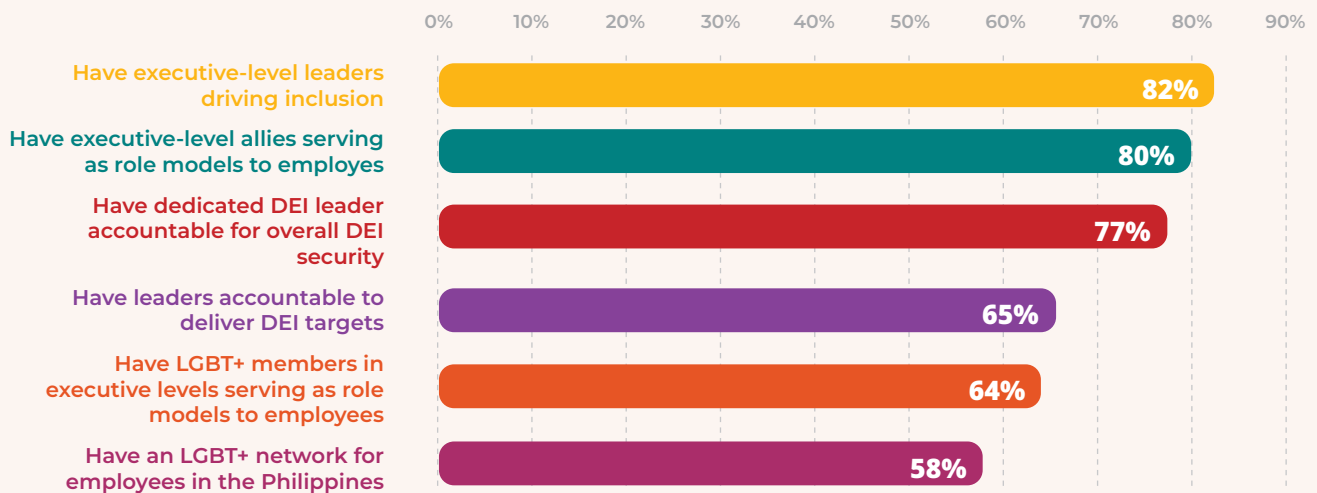
COGNIZANT	CONSCIENTIOUS	INCLUSIVE	TRANSFORMATIVE
<ul style="list-style-type: none"><li>• SOGIE 101</li><li>• Anti-harassment</li><li>• Unconscious bias</li><li>• Diversity, Equity and Inclusion training</li></ul>	<ul style="list-style-type: none"><li>• Allyship training</li><li>• Anti-Sexual Harassment</li><li>• Safe Spaces</li><li>• Anti-Discrimination</li><li>• Micro-inequities</li><li>• LGBT+, Multi-generational and person with disabilities</li><li>• Gender neutral communication</li></ul>	<ul style="list-style-type: none"><li>• HIV awareness training</li><li>• Fostering psychologically safe environment</li></ul>	<ul style="list-style-type: none"><li>• Allyship training</li><li>• Anti-Sexual Harassment</li><li>• Safe Spaces</li><li>• Anti-Discrimination</li><li>• Micro-inequities</li><li>• LGBT+, Multi-generational and person with disabilities</li><li>• Gender neutral communication</li></ul>

• See **Appendix A (Resources)** for the list of available training modules and trainers/subject matter experts.

Special attention and support should be given to leaders who want to come out as LGBT+. The 2021 PFIP survey shows that only 64% have an executive-level member who came out as LGBT+. While coming out is a personal choice, an enabling workplace makes it easier for leaders to come out.

<sup>4</sup> Kesler, 2020

## Leadership support and LGBT+ visibility and representation



### DID YOU KNOW THAT?

According to PFIP's 2021 LGBT+ Workplace Inclusion Survey, 82% of the respondents have leaders who enable DEI policies in the workplace, and 80% came out as allies. This can be attributed to the DEI training opportunities offered to leaders.

There is a huge opportunity for improvement on allyship and LGBT-specific training for leaders. Only 32% have leadership programs for allyship, and 62% have LGBT-specific training.

PFIP offers training on Allyship and has an Advocacy by Leadership Enablement (ABLE) Program.



## TAKING ACTION

### 5 Activities

Activities are shaped by policies, people, available resources, and management support; the culmination of LGBT+ inclusion is the realization of the first four areas of inclusion that this Playbook presented. Inclusive activities and interventions must recognize and celebrate the diversity of SOGIE. However, for activities and interventions to be truly impactful and sustainable, the implementation must be anchored on inclusive values recognized and embraced by all employees.

Real inclusion happens when LGBT+ individuals have representation in decision-making; when ERGs are regularly consulted; when town hall meetings provide spaces for LGBT+ employees' voices to be heard and their experiences in the workplace are surfaced; when Pride is not just something observed occasionally nor annually, but is something respected and celebrated constantly.

At this point, organizations can fully embed LGBT-inclusive activities and interventions in different areas of their operations. One example is decorum and dress code, where individuals can present and identify themselves aligned with their gender identity. Another inclusive intervention is recruitment processes that actively seek diverse LGBT+ talents in spaces where they are frequent. It may seem daunting to develop activities and interventions that drive inclusion. While some genuinely intend to be inclusive, they are sometimes met with challenges and resistance. Here are some points to consider so that activities are made more inclusive:

Here are some points to consider so that activities are made more inclusive:

- **DEI and SOGIE Awareness is a crucial foundation for inclusion.**  
People fear what they don't understand, so it is paramount to begin any inclusion effort with awareness-raising. While a majority of the companies have available DEI training, some of these are optional. It is best to make these learning sessions mandatory for all employees because an in-depth understanding of the essence of inclusion minimizes resistance to its implementation. In addition, forums and discussions on topics such as, but not limited to, SOGIE, the lived experiences of LGBT+ individuals, and overcoming unconscious bias are the bedrock through which other inclusive practices can be successfully introduced. Later, this can expand into an upskilling capacity building for LGBT+ career development, mentoring programs for LGBT+ leaders, and even a learning opportunity on LGBT+ allyship.
- **Data-driven LGBT+ inclusion.**  
Companies have a well of information at their disposal ranging from business operations to the



organization's internal workings. Data can be quantitative or qualitative, and both can be utilized to drive inclusion. However, according to the PFIP Inclusion Survey, only half of the companies declared that they utilize data to drive their inclusion strategy. One reason is that some companies fear that collecting personal data, such as gender-related information, can be construed as a data privacy violation. While this is a valid reason, companies can still introduce technology for inclusion that does not infringe on one's fundamental rights by ensuring that providing information is voluntary and confidential and by declaring the purpose and possible use of the collected data.

Reliable data should be the backbone of interventions and activities. For instance, offering financial assistance and benefits to employees undergoing gender-affirmation treatment can be justified by data on surgery costs and the impact of gender-affirmative actions on employee well-being and productivity. The implementation of new benefits can be tracked on an ongoing basis with regular employee surveys to determine whether all employees and LGBT+, in particular, value them.

- **Sustained engagement is key.**

LGGBT+ inclusion is so much more than simply participating in Pride season. While Pride month-related events can be a good starting point in raising awareness of LGBT+ issues, interventions must not end there. Inclusion must be present and visible from recruitment and hiring to onboarding, in the company communication practices to the way employees can identify and present themselves, and up to the smallest detail in infrastructure design.

One way of ensuring sustainability is by providing upskilling program career developments for LGBT+ employees and mentoring programs specific to LGBT+ emerging leaders, creating arbiters of inclusion.

- **Stay attuned to the needs of the LGBT+ community.**

Any intervention for LGBT+ inclusion is effective only in as much as it successfully addresses and responds to the needs of LGBT+ employees. Essential to surfacing this is sustained coordination and dialogue with your employees with diverse SOGIE. This Playbook reiterates the importance of consultation.

Ultimately, all these interventions must address the gender-based discrimination and challenges experienced by employees. The yardstick of success is the level of comfort and safety of LGBT+ individuals in fully owning and expressing themselves in the workplace.



# SCALING UP

It is essential to note that LGBT+ inclusion should not end in the workplace; fostering diversity must extend to the relationships organizations forge and sustain beyond their hierarchy. Advancing diversity can be in the form of inclusive branding, forging partnerships, and guaranteeing social responsibility. And one of the most effective ways to engage external partners to embrace diversity is to hinge relationship building on inclusion.

## SCALING UP

# Communication and Branding



Organizations that do sterling work in creating an inclusive environment for diverse sexual orientations and gender identities enact policies and frameworks that translate inclusive aspirations into reality. These policies ensure the language of inclusion is embedded in communications guidelines and is officially cascaded across the organization.

There is now a growing recognition of inclusive forms of communication, which is reflected in companies' use of gender-appropriate pronouns, honorifics, and lived names. While this is already a feat, its implementation must be accompanied by awareness raising to ensure its integrity, especially for transgender, queer, non-binary, and gender-nonconforming individuals.

LGBT-inclusive language can be espoused better if embedded in official forms of internal communication, such as newsletters and emails, and during meetings. If accompanied by an organizational policy that mandates and rationalizes the use of inclusive language, diversity will be understood and embraced at a deeper level. It is only in the full realization of inclusion in the company culture that an organization can effectively communicate to external parties about their practice of diversity.

Effective branding links potential consumers, clients, and partners to the company. Building an identity that instills a culture of diversity and belonging attracts people and organizations with similar values, and LGBT-inclusive branding is one way to go about it.

Most organizations communicate their support for LGBT+ inclusion through branding by changing their logos to colorful shades of the rainbow to signify unity during Pride month. While this creates an impression of being an ally, its effect is short-lived. LGBT+ individuals and their allies aspire for something sustained and consistent.

### DID YOU KNOW THAT?

**LGBT-specific global communications guidelines** (i.e., as practiced by Telstra, led by their Australia-based Pride ERG, Spectrum) are in place, and leaders can explore opportunities to align it with the Philippine cultural context.

Emerson has meaningful **partnerships with community organizations**. Emerson has partnerships with the Home for the Golden Gays. They also supported youth-led LGBT wellness initiatives and mentored young people on the importance of inclusive workplaces.



## SCALING UP

# Expanding Engagements

### 1. Engage other actors in the value chain

Organizations signify their commitment to inclusion by increased investment in identified LGBT-led or Pride ally suppliers and vendors. Supplier diversity programs are potent platforms for innovation and can create jobs in the communities where organizations operate. Organizations have been exploring this practice and how to make it compatible with business constraints created by the COVID-19 pandemic. With trusted suppliers and vendors that have yet to fully commit to inclusion, SOGIE and DEI discussions can be initiated.

### 2. Exchange resources with government actors

Businesses are initiating LGBT+ inclusion practices in response to less-than-ideal policy environments for advancing and safeguarding the rights of LGBT+ workers and their families. It must be reiterated that the State remains to be the primary duty-bearer for upholding social protections for workers of diverse SOGIE. There are many avenues for businesses to be accountability partners as the State carries out its mandate of promoting equal rights in the workplace and beyond. These include:

**a. Partner with LGUs in sites of operation, to form local ADOs.** As a National Anti-Discrimination law has yet to be passed, one strategy that advocates have been forwarding is to start small through local anti-discrimination ordinances (ADOs). Equality champions among local political leaders can be easily identified and capacitated, making way for ADOs at the provincial, municipal, and even at the barangay level.

Companies might be operating in LGUs with these ADOs. Typically, a local Pride council is assembled as part of the ADOs' implementation. These councils are multisectoral in composition, and leaders from the private sector—including businesses—are tapped as members.

**b. Rally support for the passage (and eventual implementation) of the SOGIE ADB.** Several versions of the Sexual Orientation, Gender Identity, and Gender Expression (SOGIE) Equality Bill or the Anti-Discrimination Bill have been filed in the House of Representatives and the Senate since 2000. As of this writing, versions of this bill have been refiled and consolidated into Senate Bill 1600 (An Act Prohibiting Discrimination on the Basis of SOGIESC and Providing Penalties Therefore) under the 19th Congress of the Philippines. This was submitted by the Committee on Women, Children, Family Relations and Gender Equality, and Finance, with Senators Hontiveros, Legarda, and Villar M. as authors and has already passed the first reading.

Workplace discrimination is a theme emphasized in the latest version of the bill filed in December 2022. Organizations in the private sector are enjoined to be active stakeholders in preventing discrimination on the basis of SOGIE, through the establishment of diversity programs.



## SCALING UP

# Hybrid Work: the future of workplace models

In a McKinsey & Company article on hybrid work<sup>5</sup>, the consulting firm suggests that this setup is here to stay. Survey after survey shows that employees clamor to maintain it for reasons including health, family, and work-life balance. Employers who view in-person work as a return to normality must consider how strongly employees feel about flexible workplace models. In the same survey, two out of three employees who prefer hybrid models say they are likely to find other opportunities if asked to return fully on-site.

As employers refit existing workplace models, they must weigh the risks and benefits of this new setup. On the one hand, the potential benefits of hybrid work include a higher level of flexibility, a better work-life balance, and a more tailored employee engagement (McKinsey & Company, 2022). Such may have an immense impact on the DEI efforts of the company and employees' productivity. On the other hand, this workplace model may create an unequal playing field and intensify in-group versus out-group dynamics. For companies already struggling with their DEI policies and systems, adopting ill-conceived schemes on hybrid work could mean an increased attrition rate, decreased productivity, and worsened DEI culture.

Maximizing the benefits of an inclusive hybrid work culture is complex and delicate work. However, leaders—truly inclusive employers—should take this challenge as an opportunity to build a workplace that works for its most important stakeholders, the employees.

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<sup>5</sup> <https://www.mckinsey.com/capabilities/people-and-organizational-performance/our-insights/hybrid-work-making-it-fit-with-your-diversity-equity-and-inclusion-strategy>



## Making the “new normal” fit your LGBT+ DEI policies

- 1. Consult employees.** Leaders should first collect employees’ preferences, needs, and expectations vis-à-vis workplace setup.
- 2. Utilize feedback.** Managers should regularly ask for feedback from employees as the company experiments with novel and agile approaches to hybrid work.
- 3. Incorporate results.** Amidst this experimentation, leaders should incorporate the feedback gathered from the employees into several sound inclusion practices.
- 4. Employ inclusion practices** centered around 1) *work-life support*, 2) *team building*, 3) *mutual respect* (McKinsey & Company, 2022)
  - a. Work-life support** - Valuing employees’ nonwork demands, responsibilities, and interests
    - The COVID-19 pandemic has enabled employees to reassess their work-life trade-offs. These reassessments revealed employees’ clamor for organizational cultures that emphasize well-being and more purposeful work.
    - Companies may advance policies that support flexibility i.e., extended parental leave, flexible hours, work from home policies.
    - Companies may experiment with semi-permanent policies on flexible locations e.g., one tech company allows employees to work up to one month each year remotely from any location within their current country. One company adopted a “work from wherever” policy, allowing employees the flexibility to work from a location of their own choice.
    - Management support is critical for employees who want more flexibility in their work-life setup. Managers should send a powerful signal to encourage these employees e.g., managers model flexibility and support various work-life options, particularly in a hybrid environment.
  - b. Team building** - Fostering trust, collaboration, and healthy conflict among team members
    - Employees do value flexibility and work-life balance. It has to be mentioned that flexibility in the hybrid model may promote isolation, particularly when team cohesion is lacking. Some studies underscore that remote work can also lead to more static and siloed collaboration. To address such effects, leaders should intentionally build stronger teams.
    - Effective team builders foster trust, collaboration, and healthy conflict.
    - Some possible activities include: encouraging employees to know one another and how they get work done; creating buddy/peer systems; coaching employees; integrating new members in hybrid work environments; setting up coffee chats among new hires and company representatives to address silos.

- c. **Mutual respect** - Exhibiting genuine concern for the well-being of all employees; like employees showing commitment to treat one another fairly and respectfully
- The hybrid workplace model engenders fewer in-person interactions. There will be difficulty in connecting with colleagues and the chances of miscommunication is high.
  - Leaders should encourage environments that value mutual respect. The following may be useful in encouraging such behavior:
    - Create norms that encourage employees to view one another as human beings, not merely as coworkers. Make it easy for employees to share personal updates, both positive and negative. This is critical as employees are navigating complex work-life boundaries in hybrid work.
    - Foster a culture that encourages employees to learn with and from one another. Reframe mistakes as opportunities for improvement. Managers should also encourage two-way feedback to let employees voice what is going well and what could use improvement.
    - Celebrate and amplify employee contributions. Advance an environment that recognizes such moments.

## SCALING UP

# DEI as a System of Intersectional Programming

Now more than ever, workplaces are pivoting to DEI as a norm rather than as an exception. As a result, more companies now have DEI-dedicated leaders and are more open to recognizing numerous employee network groups that have multiple and diverse needs. While recognizing diversity is crucial, it is also imperative to acknowledge and understand how multiple social identities, such as gender, ability, race, age, and ethnicity, can intersect (for instance, a transwoman with a disability or an indigenous queer person). This intersectional identity affects how DEI programs must be developed and implemented.

Part of scaling up DEI interventions is doing away with focusing on just one identity or compartmentalizing diverse identities. Instead, companies must now treat DEI as a system that exerts intersectional programming and is embedded in the entire organizational operations. One example already done by some companies in recruitment and hiring is targeting LGBT+ persons with disabilities. Such initiatives also demand that programs and benefits for employees take into account this intersectionality of identities.

Ultimately, this means intersectional DEI programming must be demonstrated in six key facets of inclusion identified by PFIP: policies, benefits, organizational support, technology, education and enablement, and social responsibility. These eventually create a robust system that continuously propels a workplace culture of diversity and inclusion.



## SCALING UP

# Locating your Progress: Four-Tier Inclusion-Transformation Framework

Inclusion is an ongoing journey where organizations must regularly revisit their inclusion plans and implementation. While there is no set destination for inclusion, it would be helpful if organizations could locate their progress. Conversations with leaders reveal that despite an absence of formalized and codified policies and strategies toward inclusion, no organizations start entirely from zero. There are already practices that knowingly or unknowingly usher organizations on the path toward inclusion.

As such, this Playbook ends with a Four-Tier Inclusion-Transformation Framework intended to facilitate a candid yet encouraging self-assessment among organizations and their leadership to locate their efforts toward meaningful, impactful, and sustainable inclusion. Here are some key features and practices among organizations characteristic of the tiers they best fit into.

To further guide organizations to become transformative in their ways of inclusion, the annex provides more nuanced information, with illustrative examples from several PFIP member institutions, of how each tier pans out in the areas of (1) Leadership, Organizational Culture, and Governance, (2) Human Resources, Policies, and Procedures, and (3) Organizational Support and Resources.

Understanding inclusion, specifically on the basis of SOGIESC, is evolving, not just in business discourses but also in civil society circles, and in the academe; both through public and intimate, private domains of life. Data is emerging, but from what we know (and this cannot be overemphasized), inclusion is the right thing to do and it is good for business. It is contingent upon leaders and actors in the DEI spaces to be creative with solutions, unintimidated by the false dilemma of choosing between profit and people.

As potent as the workplace is in catalyzing changes, inclusion is more encompassing. Businesses, with their resources and social capital, cannot do it alone. Inclusion is a shared responsibility because exclusion is a shared experience. Our lives as workers and leaders are not confined to the workplace. True and meaningful inclusion can start in the workplace, and we are challenged to push this commitment beyond the world of work.

Tier 1 COGNIZANT	Tier 2 CONSCIENTIOUS	Tier 3 INCLUSIVE	Tier 4 TRANSFORMATIVE
<ul style="list-style-type: none"><li>• Cognizant Organizations are mainly compliant with local policies to keep the business running. Some companies are primarily on a compliance basis to their headquarter's directives. They may have a basic understanding of SOGIE and DEI. However, inclusion strategies are absent, and DEI is not part of the organizational goals and indicators.</li></ul>	<ul style="list-style-type: none"><li>• Conscientious organizations observe the “glocalization” of global strategies from their headquarters. Organizations recognize inequalities based on SOGIE, so gender and SOGIE are mainstreamed in the company. There are visible key stakeholders and the presence of self-identified LGBT leaders. Conscientious organizations already have LGBT+ network groups; however, succession and structure might be unsecured.</li></ul>	<ul style="list-style-type: none"><li>• Inclusive organizations put a premium on ensuring LGBT+ network groups are meaningfully engaged. These networks are established and are embedded in policies and strategies. A bottom-up approach to DEI is preferred and is ushered by LGBT+ leaders who possess clout over decision-making.</li></ul>	<ul style="list-style-type: none"><li>• Transformative organizations prioritize DEI and SOGIE inclusion. This roots in their intersectional understanding of gender and other often marginalized identities. Resources for inclusion are secured following an equitable distribution, and LGBT+ network groups have access to and control over these resources. These companies are exemplars among their industry peers, often extending inclusion beyond their organizations. They publicly advocate support for inclusion.</li></ul>

# Glossary of terms

## **Accessible/accessibility**

It means that a person, regardless of their SOGIESC, is afforded the opportunity to acquire the same information, engage in the same interactions, and enjoy the same services/ benefits as those of other groups (e.g., heterosexual counterparts, abled-people).

## **Allyship**

The active role of a person in advocating for the inclusion of marginalized and vulnerable identities so that they can have full and meaningful participation in all areas that affect them.

## **DEI (Diversity, Equity and Inclusion) Framework<sup>6</sup>**

*Diversity* - involves the representation or composition of various social identity groups in a work group, organization, or community. The focus is on social identities that correspond to societal differences in power and privilege, and thus to the marginalization of some groups based on specific attributes—e.g., race, ethnicity, culture, gender, gender identity and expression, sexual orientation, socioeconomic status, religion, spirituality, disability, age, national origin, immigration status, and language. (Other identities may also be considered where there is evidence of disparities in power and privilege.) There is a recognition that people have multiple identities and that social identities are intersectional and have different salience and impact in different contexts.

*Equity* - providing resources according to the need to help diverse populations achieve their highest state of health and other functioning. Equity is an ongoing process of assessing needs, correcting historical inequities, and creating conditions for optimal outcomes by members of all social identity groups.

*Inclusion* - an environment that offers affirmation, celebration, and appreciation

of different approaches, styles, perspectives, and experiences, thus allowing all individuals to bring in their whole selves (and all of their identities) and to demonstrate their strengths and capacity.

## **ERG (Employee Resources Group)**

Employee-led groups that gravitate towards each other because of a shared experience, identity, or aspirations. ERGs are formally recognized by the company and serve as support systems for employees.

## **ESG (Environment, Social, and Governance)<sup>7</sup>**

These are called pillars in ESG frameworks and represent the 3 main topic areas that companies are expected to report in. The goal of ESG is to capture all the non-financial risks and opportunities inherent to a company's day to day activities.

## **Equality champions**

Individuals playing a central role in disseminating good practices and encouraging the promotion of equality within organizations, especially within the government in the passage of the SOGIE Equality Bill.

## **Gender self-identification**

This is when an employee voluntarily discloses one's gender identity to their employer on the premise of it being subjected to privacy policies. Self-identification mechanisms are strategically implemented and utilized by companies to inform their DEI policies and initiatives.

## **Lived name**

A self-chosen or personal name used instead of a legal name, usually used by a transgender individual in place of their legal name.

## **Hybrid work**

A flexible work model that allows employees to

<sup>6</sup> From APA Equity, Diversity, and Inclusion Office, 2021

<sup>7</sup> <https://www2.deloitte.com/ce/en/pages/global-business-services/articles/esg-explained-1-what-is-esg.html.html>

choose their most convenient workplace. This can mean working in-office or remotely, and even a combination of both.

### **Intersectionality**

A concept recognizing that one's lived experience is affected and shaped by the intersection of multiple identities such as gender, race, ethnicity, age, disability, religion and other forms of identity markers. The concept asserts that the intersectionality of different identities results in varying degrees of discrimination, exploitation, marginalization, oppression, and subordination.

### **Human-rights based approach (HRBA)**

This approach highlights the role of state and non-state actors in upholding human rights as duty bearers and the role of rights bearers as active agents in their own development; socio-economic, political, and cultural spaces where transformation of the status quo might be advanced. Key principles of the HRBA include: 1) non-discrimination and equality, 2) participation, and 3) accountability.

### **LGBT+**

LGBT stands for Lesbian, Gay, Bisexual, and Transgender. The plus sign represents people with diverse SOGIESC who identify themselves with other. In many locations, the letters and their order vary, e.g., LGBTQIA+ (Q stands for queer, I for intersex, and A for asexual), but ultimately they all refer to one community.

### **LGBT-inclusive branding**

Campaigns that espouse messages of inclusion, equity, and diversity.

### **LGBT-inclusive language<sup>8</sup>**

Inclusive language is a way of acknowledging and respecting the diversity of bodies, genders, and relationships. People express their gender and sexuality in different ways.

### **Reverse Mentoring**

This approach pairs new employees with executive team members to mentor them on various topics of strategic and cultural relevance (Harvard Business Review, 2019). For this Playbook, reverse mentoring highlights the heightened consciousness of LGBT+

employees on issues surrounding their lives; the executive members utilize this knowledge to improve DEI culture and system in the workplace.

### **Sexual Orientation, Gender Identity, Gender Expression, and Sex Characteristics (SOGIESC)**

*Sex* is a physiological condition, determined by biological make up. (Male, Female, or Intersex)

*Gender* is a social construction, what it means to be a man or woman. It also refers to attitudes, feelings, behaviors, and assigned roles that a given culture associates with a person's biological sex.

*Sexual Orientation* is determined by desire (or attraction). The object of one's desires whether physical or emotional (romantic) determines their sexual orientation. The expression of desire is your sexual orientation (e.g. Heterosexual—towards members of the opposite sex; Bisexual—towards members of both sexes; Homosexual—towards members of the same sex).

*Gender Identity* is one's internal and subjective experience of being a man or a woman that may or may not be matched to their assigned sex at birth. This is where "transgender" comes in, a term applied to people whose appearance and/or behaviors do not conform to traditional gender roles as compared with cisgender people.

*Gender Expression* is the external manifestation of one's gender identity, usually done through clothing, haircut, mannerisms, voice, or body characteristics. (Masculine, Feminine, or Androgynous)

SOGIESC-related acronyms are not static and continue to evolve over time. To ensure inclusivity and accuracy, they should be applied with careful consideration to the individuals or populations being referenced

For a more detailed description of SOGIESC, visit the link:

<https://playbook.pfip.com.ph/SOGIESCGlossary>



<sup>8</sup> <https://www.vic.gov.au/inclusive-language-guide>

## **Workplace climate<sup>9</sup>**

The meaning people attach to certain features of the work setting. It's the feeling or atmosphere people have in an organization, either day-to-day or more generally.

## **Workplace Inclusion**

### ***Inclusive policies:***

Implementing anti-discrimination policies in the workplace.

- Has an anti-discrimination policy based on sexual orientation and gender identity and expression, practiced in the Philippines
- Provides mechanisms for LGBT+ employees to raise concerns if they experience discrimination in the workplace

### ***Inclusive benefits***

Providing benefits to meet the needs of LGBT+ employees

- Provides equivalent benefits to married different-sex couples and same-sex domestic partners in terms of medical and family-related benefits, group life insurance among others
- Implements or offers transgender-inclusive practices and benefits such as, but not limited to, gender neutral restrooms, transition-related medical benefits and social transitioning

### ***Organizational support***

Enabling Diversity, Equity & Inclusion (DEI) through organizational leadership and membership in a local LGBT+ network group

- Has a dedicated DEI leader accountable for overall strategy
- Is led by executives and leaders who identify as members of the LGBT+ community and/or allies, serving as role models to employees
- Is part of and engages with a local LGBT+ network group whose objectives are aligned with corporate DE&I strategy

## ***Technology for inclusion***

Enabling use of technology to promote inclusion of diverse identities.

- Technological innovations are designed around the needs of disabled people or other minority groups to give them leverage, and forward inclusion in the workplace.

Harnessing technology and data to enable and support DEI strategies

- Has an HR System that is enabled for LGBT+ self-identification, chosen name and pronoun declaration
- Has LGBT+ inclusion strategies driven by data collected over time

## ***Education and enablement***

Promoting a DEI mindset in the workplace to support LGBT+ career growth

- Embeds inclusion topics in leadership and management trainings, such as unconscious bias, inclusive leadership
- Provides a wide range of DEI training in the workplace--from general DEI topics to allyship and LGBT-specific themes; provides upskilling opportunities to aid the career development of LGBT+ employees

## ***Social responsibility and thought leadership***

Ensuring that DEI is not limited to the confines of the workplace

- Expresses public support to LGBT+ inclusion through different channels
- Provides funding to support external CSR activities for the LGBT+ community
- Proactively influences the workplace culture of clients, suppliers and other stakeholders to be LGBT+ inclusive

## **1. DEI Maturity Model**

## **2. Resources**

- a. Useful links
- b. Facebook video/ discussion of PFIP survey results
- c. Programs/ Groups to support
- d. Other PFIP events/resources from their Website
- e. Trainings by PFIP and/or UPCWGS
- f. Three to five local resources (can be PFIP publications, or that of member orgs)

## **3. Bills and ordinances**

(SOGIE ADB, some examples of well-drafted local ADOs)

## **4. Key informant interview and focused group discussion participants**

## FOUR-TIER INCLUSION-TRANSFORMATION FRAMEWORK

**Theme I:** Leadership, Organizational Culture, and Governance

	Leadership
<b>Tier 1</b> <b>Cognizant</b>	<p>Executive-level leader as LGBT + sponsors/ ambassadors</p> <p>General DEI training for leaders</p>
<b>Tier 2</b> <b>Conscientious</b>	<p>Executive-level leader driving inclusion</p> <p>Inclusion topics in leadership and management training</p>
<b>Tier 3</b> <b>Inclusive</b>	<p>With MANCOM-level leader accountable for delivery of DEI targets</p> <p>With executive level who came out as LGBT+</p> <p>LGBT+ specific training required for leaders</p>
<b>Tier 4</b> <b>Transformative</b>	<p>LGBT+ is represented in the management committee/ board of directors by leader/s who identify as members of the LGBT+ community</p> <p>CEO and MANCOM members accountable for DEI targets</p> <p>Leadership program for allyship</p> <p>Reverse mentoring (senior leaders are mentored by members of the LGBT+ community)</p> <p>DEI is part of leadership KPI</p> <p>Leaders engage with local LGBT+ network group</p>

Strategy and Organizational Values	Accountability structure and metrics; Governance	
<p>Basic understanding of SOGIE</p> <p>Compliant with local policies</p> <p>Heteronormative approaches (gender = women)</p> <p>DEI is not embedded in the strategy</p>	<p>ERG is not established</p> <p>No budget for DEI and LGBT inclusion</p> <p>DEI not included in KPIs</p> <p>"Pride events" held</p>	
<p>DEI is embedded in strategy and organizational values</p> <p>For multinationals, "glocalization" (global strategy applied to local context)</p>	<p>ERG is established (token)</p> <p>Budget is upon request/availability</p> <p>DEI is included in HR KPIs</p> <p>General DEI elements in KPIs</p>	<p>HR director drives DEI strategy</p> <p>DEI officer is an ad-hoc role</p> <p>Some DEI policies anchor on organizational values</p>
<p>DEI - LGBT specific is embedded in strategy and organizational values</p>	<p>Assigned DEI chief that oversees implementation of DEI policies across regions/countries - global leader for diversity and inclusion</p> <p>ERG meaningfully engaged (bottom-up approach); ERG established and embedded in policies and strategies</p>	<p>DEI is part of KPIs of some leaders/ employees</p> <p>Minimal budget</p> <p>Presence of executive sponsors in ERG</p>
<p>Intersectional understanding of gender</p> <p>DEI - LGBT specific is embedded in the strategy and organizational values</p>	<p>LGBT specific DEI mechanisms</p> <p>Multi sectoral ERG</p> <p>ERG sustained engagement / can influence decisions</p> <p>Dedicated position for DEI</p> <p>DEI metrics in place and is part of ESG (Environment, Social and Governance)/ Sustainability reports which is reported publicly</p>	<p>DEI - LGBT specific metrics is used to evaluate performance of the board of directors</p> <p>Accountability across the organization</p> <p>Clear and defined accountability</p> <p>Equitable redistribution of resources - DEI and SOGIE prioritized</p>

## FOUR-TIER INCLUSION-TRANSFORMATION FRAMEWORK

### Theme II: Human Resources, Policies, and Procedures

	Recruitment Process (& onboarding)	Career Development for LGBT+ Employees
<b>Tier 1 Cognizant</b> (Employee asserts measures but HR not cooperative; Not yet instituted)	None	None
<b>Tier 2 Conscientious</b> (Employee asserts and HR recognizes (pending ManCom approval))	None to sporadic	None to sporadic
<b>Tier 3 Inclusive</b> (HR-instituted and employees are already availing them; ManCom is supportive)	LGBT hiring quotas Mandatory SOGIESC modules in onboarding	ManCom
<b>Tier 4 Transformative</b> (HR- and employee-led; Supportive interventions for LGBT families; (there is sharing of power), with robust and active ERGs; ManCom drives its creation and implementation)	LGBT hiring + promotion quotas (these reflect unequal position of marginal identities) Mandatory SOGIESC bias in onboarding	Reverse mentoring (double consciousness of LGBT employees)



Strategy and Organizational Values	Well-being interventions (Transition support; MPSHSS - psychosocial gender-affirming support; dress code+decorum policies)	Facilities (wash facilities, rest/sleeping quarters)	Redress Mechanisms for discrimination (DPA compliance across levels)
None	None	Compliant, heteronormative	Catch-all ethics hotline General anti-discrimination policy Non-retaliation, prompt, fair
Can get benefits equivalent to cis/het families + extra steps	seasonal/ad hoc programs and measures (i.e., mostly during Pride month only)	Gender-neutral facilities	LGBT-specific exist (internal); Case outcomes archived (may/may not be used for learning)
No extra steps needed	Institutionalized year-round support and programs for LGBT employees	All gender + segregated facilities	LGBT-specific third party arbiter Case outcomes shared, doesn't inform policy
Benefits that address LGBT-specific needs and concerns (in recognition of disadvantaged position) All present	Institutional support and programmes for LGBT employees and their families Extends to LGBT families and community	All gender + accessible	Third party arbiter (LGBT-specific) - multi-expert council but there is a delegated SOGIESC/gender specialist; Case outcomes communicated across organization, and inform policies Case outcomes used for education

## FOUR-TIER INCLUSION-TRANSFORMATION FRAMEWORK

**Theme III: Organizational Support and Resources.**

Extending beyond the hierarchy, offers the ways in which organizations can create larger inclusive ecosystems through communication and building partnerships.

	Communication and Branding	Partnership and extension
Tier 1 Cognizant	Only in internal communications	Just within the organization (e.g., between departments, LOBs, or sites)
Tier 2 Conscientious	SOGIESC+DEI in internal and customer-facing communications; mostly for optics, seasonal (e.g. rainbow logo)	Informed; optional
Tier 3 Inclusive	SOGIESC+DEI in brand and values	Across the value chain engaged; SOGIE/DEI is a key element in vendor/supplier selection process
Tier 4 Transformative	SOGIESC+DEI embedded in brand ID and values; visible in all communications collaterals/ presence; AND  Clear and consistent pronouncements and positions on critical SOGIESC issues	Actively engaging and advocating communities

## A. Useful links

### Getting LGBT+ inclusion right in employee surveys

Gena Cox, Ph.D., Bre Wexler, Ph.D., and Fred Macoukji, M.A.

IBM

<https://playbook.pfip.com.ph/LGBTInclusionSurveys>



### Helping Transgender Employees Transition at the Workplace

IBM's Global Framework

IBM

<https://playbook.pfip.com.ph/TransFramework>



### How to be a proud ally

Small and meaningful ways to show your support to the LGBTQ+ community

Manulife Philippines

<https://playbook.pfip.com.ph/BeingAnAlly>



### Strengthening employee engagement and promoting a diverse and inclusive culture

Teleperformance

<https://playbook.pfip.com.ph/TPPride>



### Collecting LGBT+ Data for Diversity: Initiating Self-ID at IBM

M. V. Lee Badgett, Professor of Economics

University of Massachusetts Amherst

<https://playbook.pfip.com.ph/IBMSelfID>



### Sexual Orientation, Gender Identity, Gender Expression, and Sex Characteristics: A Primer

University of the Philippines Center for Women's and Gender Studies

<https://playbook.pfip.com.ph/SOGIESCPrimer>



## B. Video presentation of PFIP LGBT+ Workplace Inclusion survey results

<https://link.pfip.com.ph/SurveyResults2021>



## C. Programs/groups to support



### Home for Golden Gays

<https://thegoldengays.wordpress.com/>



### Project Red Ribbon

<https://www.hivphilippines.com>



### The Red Whistle

<https://www.theredwhistle.com/>



### Ugat ng Kalusugan

<https://rootsofhealth.org/>



### loveyourself

<https://loveyourself.ph/>



### Duyan Program

<https://www.hivphilippines.com/duyan-program>



### Gabay sa Pulang Laso

<https://www.facebook.com/GabayPLI/>



## D. Partner organizations



### UP Babaylan

<https://www.facebook.com/upbabaylan/>



### Bisdak Pride

<https://www.facebook.com/Kabisdakpride/>



## 2 ADDITIONAL RESOURCES



### Mindanao Pride

<https://www.facebook.com/mindaprideph/>



### PFIP Leadership Forum

<https://link.pfip.com.ph/HABI2022Video>



### PANTAY

<https://www.facebook.com/PANTAYPilipinas/>



### STRAP

<https://www.facebook.com/STRAP.ORG/>



### UP OUTLaws

<https://www.facebook.com/UPOutlaws/>



## E. Other PFIP events/resources from their Website

<https://pfip.com.ph>



### 2021 Philippine LGBT+ Workplace Inclusion Survey

<https://link.pfip.com.ph/InclusionSurvey2021>



### PFIP events

<https://event.pfip.com.ph>



### Philippine BAHAGHARI Awards Night

<https://link.pfip.com.ph/PHBA2022Video>



### Rainbow Youth Academy College Educational Assistance Program and Skills Development Program

<https://link.pfip.com.ph/RYA>



### UP Pride Equality Talk Series

<https://link.pfip.com.ph/UPPrideEQT2022>



## F. Trainings

Contact: [secretariat@pfip.com.ph](mailto:secretariat@pfip.com.ph)

1. Sexual Orientation, Gender Identity & Expression 101 (SOGIE) and Business of Inclusion Training (all employee, managers, senior leaders or Train the Trainer)
2. Advocacy By Leadership Enablement (ABLE) Program

### UP Center for Women and Gender Studies

Contact Person: Dr. Nathalie Africa-Verceles  
(Director)

1. Gender Sensitivity Training (including SOGIESC discussion)
2. Gender and Development Mainstreaming
3. Gender Responsive Planning and Budgeting
4. Gender, Disability, and Social Inclusion (GEDSI) training

### Resources and consultations

PFIP: Jai Leonard Carinan (Executive Director)  
[executivedirector@pfip.com.ph](mailto:executivedirector@pfip.com.ph)

1. PFIP Membership
2. LGBT+ network best practices
3. Policy assessment, review and feedback
4. Benefits program
5. Dress code
6. Code of Conduct
7. Self-identification

### 3 **BILLS AND ORDINANCES**

Anti-Discrimination Ordinances in  
the Philippines

<https://playbook.pfip.com.ph/PH-ADO>

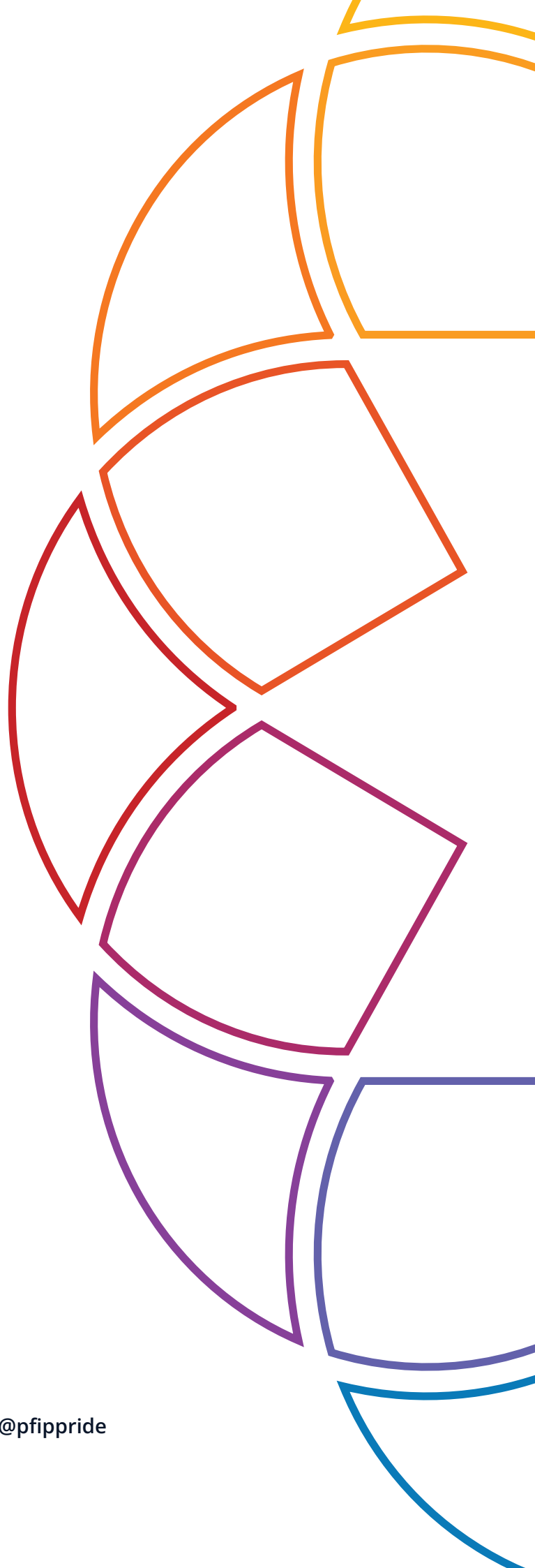


### 4 **KEY INFORMANT INTERVIEW AND FOCUSED GROUP DISCUSSION PARTICIPANTS**

<https://playbook.pfip.com.ph/participants>



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