



OL-iQ

by Out Leadership

The first comprehensive and credible approach to measuring and enhancing business impact around LGBT+ inclusion

LGBT+ Inclusion

A Competitive Imperative

No company today can afford to ignore measures known to drive better business results. The LGBT+ dividend is estimated by Credit Suisse and others to be 10%; LGBT+-inclusive companies experience a clear lift in value vs. less-LGBT+-inclusive firms.

But how to become maximally LGBT+ inclusive? And how to know what measures to dial up or down to become so? Policy is one important factor, but change is driven through a company's culture, and until policy is tied to culture, business impact can't be fully realized.

OL-iQ is the LGBT+-inclusion diagnostic tool designed, with Mathematica Policy Research, to provide a market-informed, comprehensive overview of how companies actually perform against that LGBT+-inclusive benchmark – and what specific measures they can take to improve their performance, and drive business results.

The logo for OL-iQ, featuring the text "OL-iQ" in a bold, black, sans-serif font, enclosed within a yellow rectangular border with rounded corners.

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“We pride ourselves on incorporating LGBT+ inclusion into everything we do, because we know it drives better business results and employee performance; OL-iQ is the first dynamic tool that validates how and where we can enhance programs.”

- Samantha Santos,
Head of Diversity and Inclusion
Americas BLOOMBERG L.P.

Bloomberg

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Global LGBT+ Market Opportunities

Business & Talent

20%

of US Millennials now identify as LGBT+

Of those 35-51, and total U.S. population: **12%***

77%

of LGBT+ job seekers take into account a company's LGBT+ benefits

70%

of LGBT job seekers consider the company's reputation within the LGBT+ community

* Harris Poll 2017

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On average globally, nearly **20%** of LGBT+ job seekers joined a firm primarily because of company's stance on LGBT issues and equality

LGBT+ purchasing power is nearing **\$1T** in the U.S. (\$917B) – rivalling or exceeding other minority groups

LGBT+ purchasing power is estimated to be near **\$4.7T** globally



\$4.7 trillion
global
LGBT+
market

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The Measurement Imperative

OL-iQ allows companies to leverage LGBT+ business and talent opportunity by providing them an informed baseline of where they are today—and from there, where there is opportunity to benefit more deeply from LGBT+ inclusion, and **drive business impact.**

OL-iQ Provides

- Straightforward data collection: most firms can complete the survey in 40-60 minutes *(though the questionnaire needn't be completed in one sitting, and can be shared with colleagues for their direct input)*
- A snapshot that captures a firm's present state in multiple dimensions, accounting for multiple variables that drive business results
- Benchmarking that is statistically valid across levels and regions of a company
- A baseline from which progress can be measured

“**We found OL-iQ to be highly useful in helping us identify specific, data-driven, actionable opportunities to improve our performance around LGBT+ inclusion. We recommend it!**”

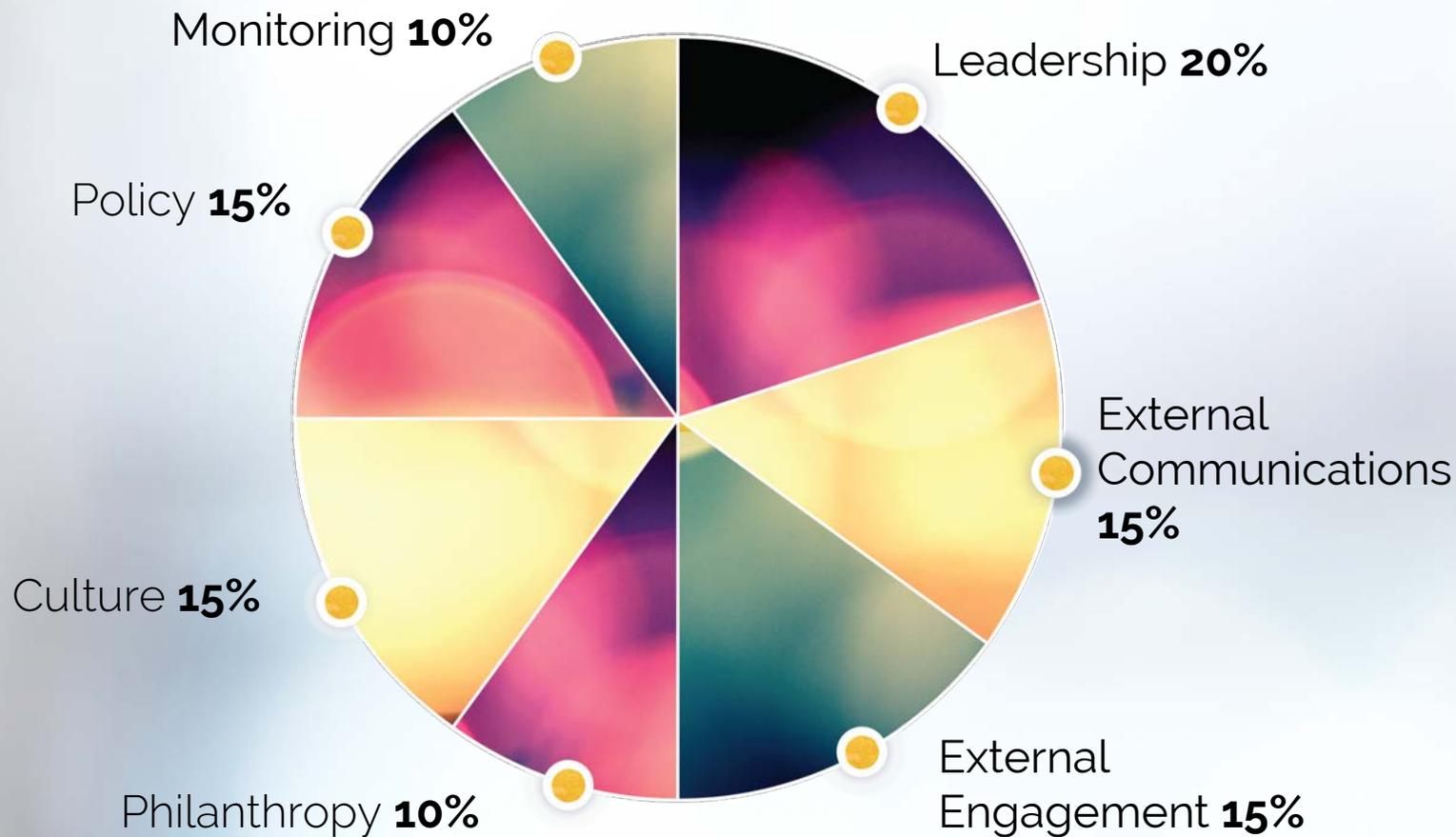
- *Jeff Formanek, Director, Structured Rates* RBC CAPITAL MARKETS

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OL-iQ How it Works

OL-iQ Weighted Scoring



The seven measured **OL-iQ** dimensions contribute to business performance at different levels of impact, as shown; for example, though both are important, demonstrating leadership around LGBT+ inclusion drives results twice as much as monitoring results.

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The Seven Dimensions

Dimension 1 Leadership 20% of total score

Leadership is the highest-weighted component of your company's overall OL-iQ score. Having visible LGBT+ leaders in senior management and corporate boards testifies to a company's inclusive culture, and creates role models for LGBT+ employees throughout an organization. Having structures that place LGBT+ inclusion under the purview of the C-suite, and hold them accountable for it, are vital components to firm-wide success.

Dimension 2 External Communications 15% of total score

Communication materials that are inclusive of LGBT+ people is one of the most visible ways that companies can engage with the LGBT+ cohort and show an inclusive mindset both internally and externally. In addition, B2C companies that don't target LGBT+ customers in their marketing and advertising materials are missing out on a market estimated at \$1 trillion in the United States alone. Allies – drawn to companies that are aggressively LGBT+ inclusive – power that number exponentially.

Dimension 3 External Engagement 15% of total score

External Engagement with the LGBT+ community is an important way for companies to demonstrate that their commitment to inclusion. Knowledge of the socio-political environment for LGBT+ people in the locations in which firms do business is a necessary step in making sure that LGBT+ employees are safe and productive in the workplace. Beyond that, publicly supporting LGBT+ issues outside the workplace shows a company's support for LGBT+ clients, customers, and employees.

Dimension 4 Philanthropy 10% of total score

Corporate Philanthropy to support LGBT+ charities, causes, and events gives firms meaningful visibility around issues that are of significance to people in the LGBT+ community. Research has shown that 75% of LGBT+ people, and 80% of LGBT+ allies, are more likely to purchase goods or retain the services of companies that publicly support LGBT+ equality.

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Dimension 5 **Culture** 15% of total score

Company Culture is just as important as good policy when it comes to supporting LGBT+ talent. To an extraordinary degree, written policies do not translate to cultural changes, so companies must intentionally and actively work to foster work environments that are open and inclusive of LGBT+ people. Moreover, research has shown that women and people of color become more engaged when supervisors voice support as LGBT+ allies.

Dimension 6 **Policy** 15% of total score

Policy undergirds LGBT+ inclusion. Having adequate policies and procedures to protect and address the unique needs of LGBT+ employees is a necessary first step to establishing inclusive environments that will allow employees to do their best work.

Dimension 7 **Monitoring** 10% of total score

Monitoring. You can't change what you can't measure. Without charting progress against goals, and seeing what, if anything, has changed, companies cannot know if their investment is having strategic and real business impact. Monitoring provides a dashboards for fine-tuning LGBT+ inclusion efforts, while demonstrating a commitment to professionalism – and results – in the space.

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Mind the Gap

Realizing “Return on Equality”

OL-iQ was developed to demonstrate business opportunity around LGBT+ inclusion; there isn't a company in the world that scores 100 today. We suggest that you use your results to identify where you can enhance your own company's business impact. If you would like more information on how Out Leadership can help you do that, please contact: Matt.Fouracre@outleadership.com.

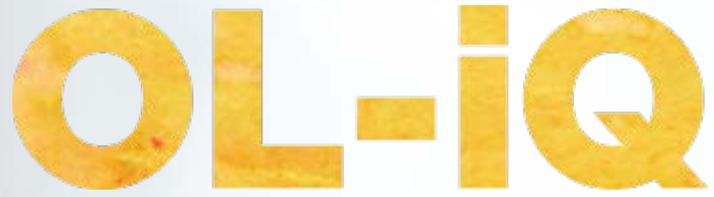


OL-iQ The Download

- 1.** Identify one key leader to 'own' the process of survey completion
- 2.** Identify and engage other stakeholders at the firm to help inform the survey, as needed (*HR, Marketing/Communication, and key business leads tied to revenue generation and the C-Suite*)
- 3.** Multiple individuals can fill in the survey directly, over multiple sessions; if desired, Out Leadership can assist in survey completion, as noted in survey
- 4.** Raw scores will be available in real-time upon completion of survey, overall and by dimension

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Correlating LGBT+ Inclusion Performance to other CSR Issues

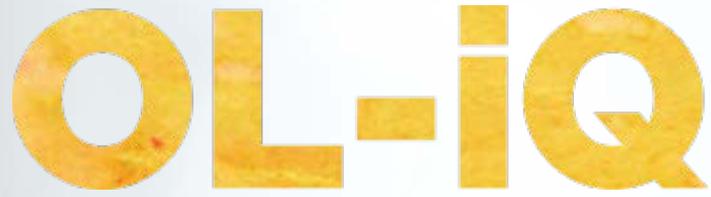
Out Leadership, in partnership with Just Capital, will also track and measure the performance of companies' OL-iQ scores against Just Capital's data of firms in the Russell 1000, providing a data-driven, dynamic overview of the connection between LGBT+ inclusion and CSR performance.

“Efforts to be more inclusive can be a tricky thing to quantify. Sometimes, it can be difficult to understand what is needed to further shift the needle in a way that will create positive business results. OL-iQ helped us understand how we’re doing with much more granularity – and will help us optimize our performance as we continue to focus on building a diverse and inclusive workforce.”

- Chris Crespo, Inclusiveness Director, EY



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Leveraging Insight for Business Impact

(fee based opportunities)

- 1. Employee Engagement Surveys.** Out Leadership will conduct an employee engagement survey among the employee base represented in the survey (e.g., U.S.) and map the results against your firm's OL-iQ score, providing a clear picture of employee understanding and sentiment vs. what your firm in fact provides and practices.
- 2. Custom Reports.** Based on your firm's results, areas of strength and opportunity are identified and articulated per dimension and overall, and provided in a custom report. Recommended next steps and best practices are also included.
- 3. In-Person Presentation of Findings.** OL will more deeply correlate and map your firm's results, including specific, custom strategy and tactics to deploy per dimension, and best practices for same, and present to relevant stakeholders in person *(1-3 meetings, as desired)*
- 4. Benchmarking.** By industry: how does your firm compare to other firms in your field? Provided by dimension, and overall. *(Begins September 1, 2017)*

Please contact matt.fouracre@outleadership.com for fee schedule



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