



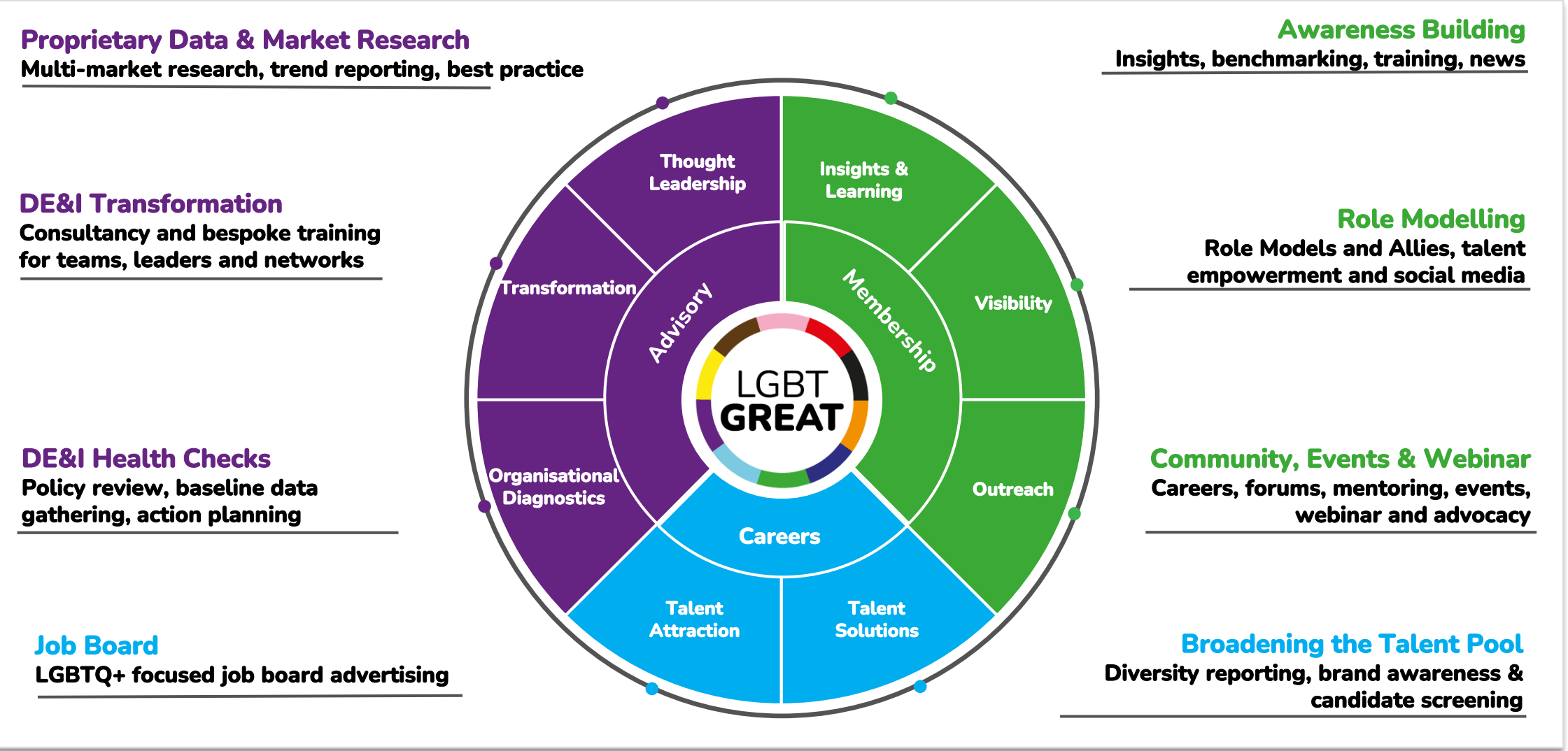
#PoweringProudWork

Training Solutions Overview

Empowering Members to enhance awareness and drive conversations

2024

Training and awareness are at the heart of what we do and how we support our clients



Welcome!

At LGBT Great, we pride ourselves in collaborating with our clients to make the financial and professional services industry a truly more empowering place for LGBTQ+ people, talent and communities.

You benefit from access to a full suite of LGBTQ+ DE&I awareness training

LV1: LGBTQ+ DE&I Introductions			LV2: LGBTQ+ DE&I Foundations		
An Introduction to LGBTQ+ DE&I	An Introduction to Allyship	An Introduction to Trans, Non-Binary and Intersex Inclusion	Language Matters – Practical Tips for Gender and LGBTQ+ Inclusive Language	The 5 Traits of Impactful Allyship	The History and Importance of LGBTQ+ Pride
LV3: Intersectional Explorations					
Seeing is Believing: The Power of LGBTQ+ Role Models and Visibility	A Bedrock of Solidarity (1) Introducing “Intersectionality”	A Bedrock of Solidarity (2) “Intersectional Allyship”	A New Frontier: LGBTQ+ Lens Investing	DE&I Strategy for ERGs / Employee Networks	Inclusion at the Intersections: LGBTQ+ x Neurodiversity
LV4: Pathways & Bespoke Training (GET IN TOUCH – alex@lgbtgreat.com)					



How we tackle common issues with training



A significant LGBTQ+ DE&I knowledge gap remains

HOW WE SUPPORT: We offer 10 CPD-accredited training sessions covering a wide range of LGBTQ+ DE&I topics from 101/introductions to advanced courses on intersectional allyship and DE&I strategy development.



DE&I often remains seen as “side of desk,” resulting in limited capacity to deliver

HOW WE SUPPORT: Our experienced facilitators take onus away from internal teams to deliver training, providing access to industry-trusted insights without additional drain on internal resources. We also offer end-to-end event management.



DE&I training can often be (incorrectly) perceived to lack depth

HOW WE SUPPORT: All our training is informed by a wide range of data. We look to the HRC, Stonewall and our own reports to supplement and contextualise training so it's accessible but well-informed.



Content is superficial, general or “one-size-fits-all”

HOW WE SUPPORT: All our sessions are tailored (either in delivery, content or both) to client requirements. Our sessions can be focused through a regional lens (i.e. APAC focus) or delivered through keynote, roundtable or testimonial-led sessions.



Measuring the impact and ROI of sessions is difficult.

HOW WE SUPPORT: We provide multiple avenues to collect feedback from attendees (live polls / post session surveys) to support Clients to understand the impact of sessions.



We work with you to understand the best delivery approach to maximise engagement with your audience(s).



Keynote + Q&A



Facilitated Roundtable Discussion



Client-Led Testimonials





Understanding ROI

*This programme will provide short, medium and long-term ROI
centred on employee engagement and impact*

Demonstrate AUTHENTIC ORGANISATIONAL ALLYSHIP and commitment to ESG and DE&I

Improved workplace CULTURE and overt commitment to INCLUSION

Improved CONFIDENCE and AWARENESS on core LGBTQ+ DE&I issues

Generate CROSS-ERG engagement opportunities to reduce siloes and improve SATISFACTION

Reduce instances of (UN)CONSCIOUS BIASES

Reduce likelihood and risks around DISCRIMINATION and HARASSMENT



“

“Over 350 employees joined the terrific webinar on allyship with dozens of questions and comments raised during the session. Thanks to the LGBT Great team for such an insightful and engaging event and looking forward to the next webinar for Inclusion Week.”

”

CLIENT TESTIMONIAL





Training Session Overviews

Structure, Learning Objectives, Examples



An Introduction to LGBTQ+ DE&I

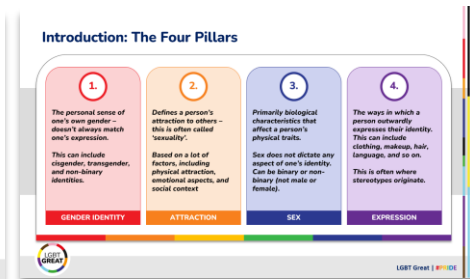
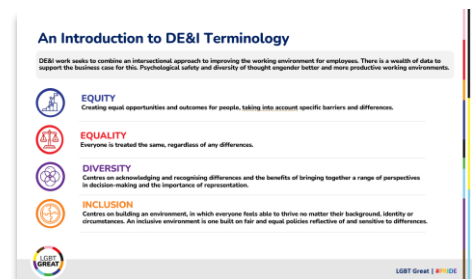
Creating a workplace that fosters psychological safety, promotes equity and champions diversity does not happen in a vacuum. It requires a concerted effort to kickstart momentum. This session supports organisations early in their LGBTQ+ DE&I journey to hit the ground running and kickstart the conversation.

Session Objectives:

- Build a foundation of understanding around common terminology (equity / equality etc).
- Understand the “Four Pillars” of LGBTQ+ identities.
- Contextualise why the conversation matters today.
- LGBTQ+-inclusive language 101
- Allyship 101
- Q&A

Sample polling question:

“How confident are you in articulating the difference between “gender identity” and “gender expression”?”



An Introduction to Allyship

Allyship, at its core, is about undertaken concrete action to empower others. In this session, LGBT Great explores the fundamentals around what it means to be an ally, the relevant terminology, before creating an space within which potential allies can ask questions.

Session Objectives:

- Understand the terminology – what is “allyship”
- Allyship actions – big and small
- What motivates allies?
- The difference between inter- and intra-group allyship
- Introducing the allyship “Growth Zone.”
- Q&A

Sample polling question:

“When thinking about the term “ally” what is the first thing that comes to mind?”



What is allyship?

Definitions.
 Ally (n): a person or organization that cooperates or helps another in a particular activity.
 Allies (n: 2nd person present). Catches or allies a resource or connectivity with (another) for mutual benefit.

Allyship is for everyone.
 Any ally is anyone that proactively promotes, supports, and drives a culture of inclusion through empathetic and intersectional actions.

Allyship is an opportunity.
 Allyship is about building safer communities, an opportunity to spotlight oppression and leverage privilege to support marginalized groups.

Allyship is not a one-time action.
 Allyship is a commitment to a life-long process of building better relationships based on trust, collaboration, and accountability.

Allyship is not an identity.
 Allyship is about proactively understanding the lived experience, oppression and challenges facing others, not of projecting your own.

Poll 1: What words do you associate with the term ally?
 Wordcloud Poll 18 responses 15 participants

Wordcloud terms: Friend, Supporter, Champion, accepting, Advocate, Trusted, Support, Listening, A presence in absence.

Conclusion: The Growth Zone Mindset

Diagram illustrating the Growth Zone Mindset, showing a progression from Fear Zone to Learning Zone to Growth Zone.

Becoming an Ally

Fear Zone: I don't understand the problem, I don't know what to do, I don't know how to help, I don't know how to support, I don't know how to be an ally.

Learning Zone: I am learning about the problem, I am learning about the community, I am learning about the culture, I am learning about the history, I am learning about the current situation.

Growth Zone: I am taking action, I am building relationships, I am creating change, I am being an ally, I am being a champion.

An Introduction to Trans, Non-Binary and Intersex Inclusion

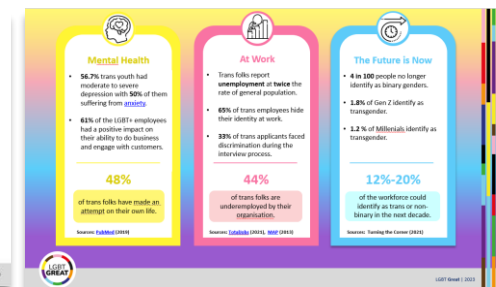
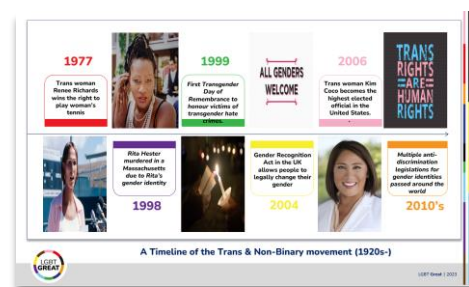
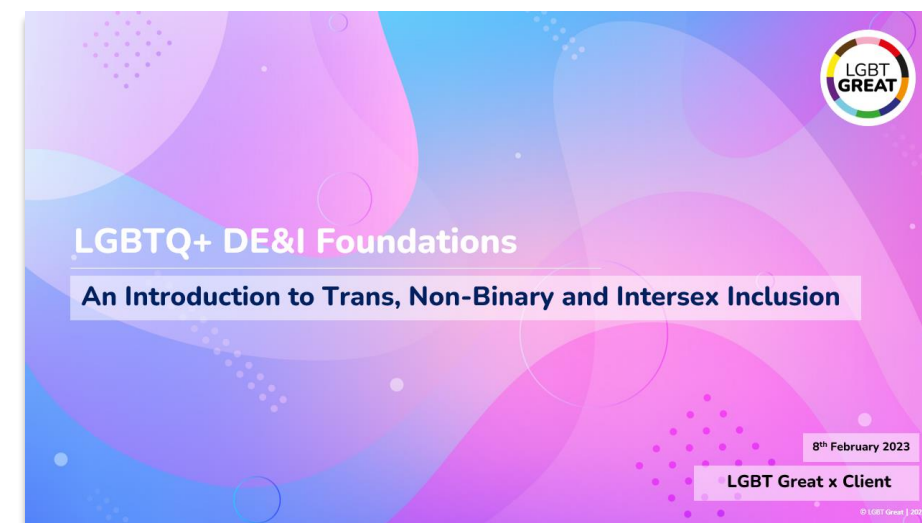
In a 30-country study conducted by Ipsos Mori in 2023, 3% of all respondents reported to be part of the trans, non-binary or gender-fluid community.* However, trans people experience disproportionate levels of exclusion, discrimination and violence. In this session, LGBT Great goes back to basics to support organisations with building a base understanding around the nuances of trans identities and why trans inclusion is so important.

Session Objectives:

- Understanding gender identity and expression.
- Context – why trans inclusion matters.
- Explore a short history of trans civil rights and developments.
- Understanding the impact of gender-inclusive language (e.g. (neo)pronouns).
- Q&A

Sample polling question:

“Which country was the first globally to legalise gender reassignment?”



*Source: **LGBTQ+ Pride, Ipsos Mori (2023)**

“

Thank you for your amazing insights training session today. We had over a third of the global organization in attendance and I thought the engagement was excellent. I had comments from several Team EquiLend members right after the call that it was really good and they learned a lot. I thought it was also telling that five out of six of our management team members, including our CEO, were in attendance; it surely would have been all six if it weren't for our CIO being in an offsite today at the same time

”

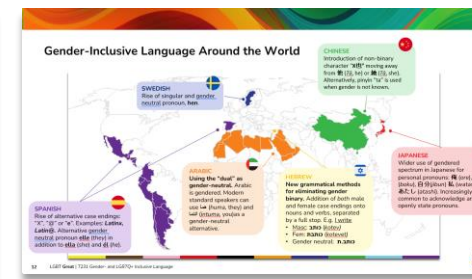
CLIENT TESTIMONIAL



Session Objectives:

- 
- Y231 | Gender- and LGBTQ+ Inclusive Language
- LGBT GREAT**
- # An Introduction to Gender- & LGBTQ+ Inclusive Language
- ## *A Practical Discussion for Organisations*
- LGBT Great x [Client]
- © LGBT Great | 2024

“How confident are you in articulating LGBTQ+ inclusive language practices in English?”



Trans & Non-Binary inclusive Language – Practical Tips		
Inclusive Language Relating to Gender Identity		
Eliminate all LGBTQ+ related terminology	Create a banter for inclusion	Personalise inclusion
<i>Avoid using existing gendered terminology, particularly when speaking about people</i>		
Marital Chaperon, Summer	Marital Chaperon, Summer	People, Chaperons, Subgroupers
Unlabeled and genderless on pass	Unlabeled and genderless on pass	Everyone, Folks, Colleague, all
<p>Whether possible, gender-neutral language is preferred. Ambiguity, however, is the practice of using a neutral point of view as a strategy – negotiation that was closely tied to female as well as male gender. When referring to others or others in general, it is important to use gender-neutral language. In informal communications held in formal, non-gendered meetings and seminars. Collectively in English can be often used to refer to a group of people. In German, however, it is not possible to use a group of people. They have to be clearly defined in order to communicate. This would be another example of this.</p>		
Advocate the importance of pronouns	Who were you talking to? "He/she said that was it?"	They said the usual
	When talking with a non-binary person, "they"	Ask for someone's pronouns if you are unsure
Don't assume someone's pronouns	Practicing not using a pronoun	
	Creating space for someone to provide with any pronouns offered including their gender is really helpful. It may seem like "Oh, thank you and welcome!" or "interesting subject and involving your own pronouns comes to the fore" means someone is unsure. But that same person is responding to the "safe" neutral instead of "they"	

The 5 Traits of Impactful Allyship

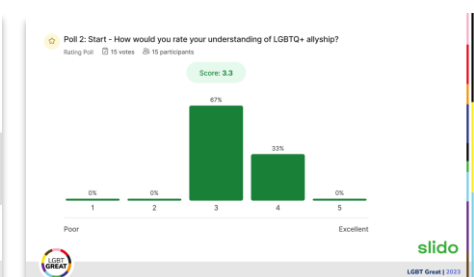
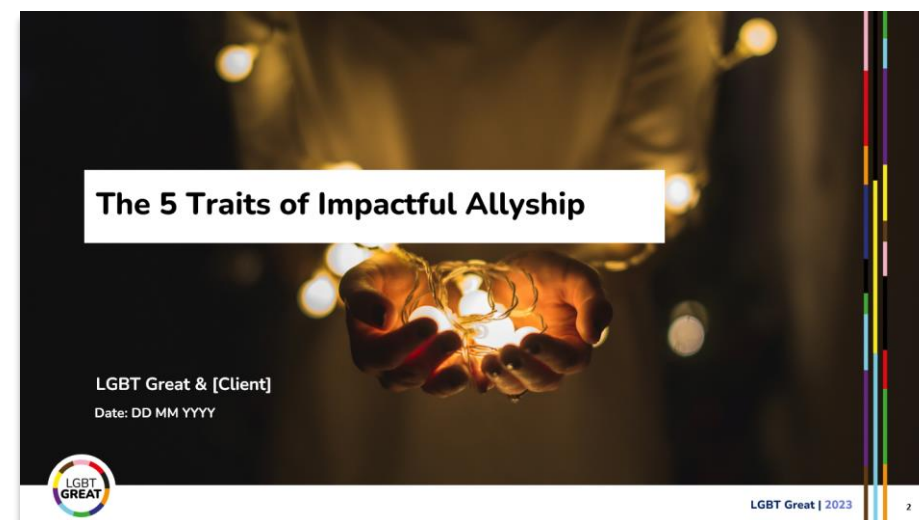
What does it take to be a great ally? Despite what many think, it is not always the big things that make the biggest difference; sometimes, it is approaching inclusion and empowerment with the right mindset that catalyses change. In this session, we take allies on a journey to understanding the mindset needed to be an impactful ally – its not as scary as you might think!

Session Objectives:

- **Introduction:** Reaffirm the 4 pillars of identity with respect to the LGBTQ+ community.
- **Understand the context and importance of allies.**
- **Explore the 5 Traits of Impactful Allyship**
- **Mapping the differences between “Impactful allyship” vs. “performative allyship”**
- **Applying this mindset to the “Allyship Growth Zone”.**
- **Q&A**

Sample polling questions:

“What word(s) come to mind when you think of what it means to be ally?”



The History and Importance of LGBTQ+ Pride

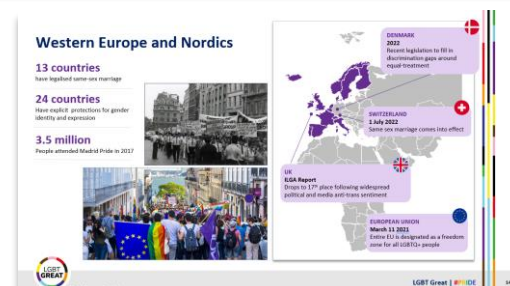
LGBTQ+ Pride, celebrated in June, is an important global celebration and reminder of the trailblazing work of LGBTQ+ civil rights activists and communities in the fight for LGBTQ+ equality. In this session, we explore some of the key dates, figures and events that led to the Stonewall uprising in 1969 and how the notion of LGBTQ+ Pride has been translated around the world.

Session Objectives:

- Explore the origins and history of the Pride movement
- Discuss the importance of LGBTQ+ Pride today
- Consider what it means to be an effective and authentic ally during Pride month and beyond
- Explore Pride celebrations and history in [REGION]
- Workshop ideas for building and maintaining momentum around LGBTQ+ DE&I during and beyond global Pride Month
- Q&A

Sample polling questions:

“When was the first LGBTQ+ explicit civil rights organisation founded in the US?”



“

“The LGBT+ language & terminology session was extremely well received by our network and had our largest number of internal participants to date. This prompted strong engagement and valuable insights throughout the session.

The internal feedback was hugely positive and was supported by our CEO, who joined the session as a panellist. I would highly endorse this session to any organization on a Diversity & Inclusion journey and look forward to continuing to learn, develop and grow with LGBT Great collaboration”

”

CLIENT TESTIMONIAL



Seeing is Believing: The Power of Role Models and Visibility

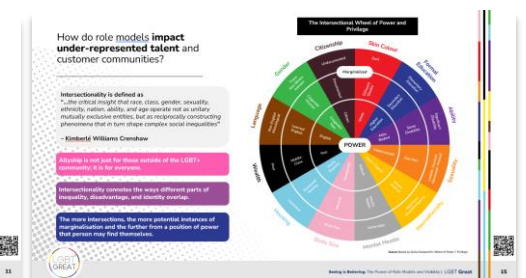
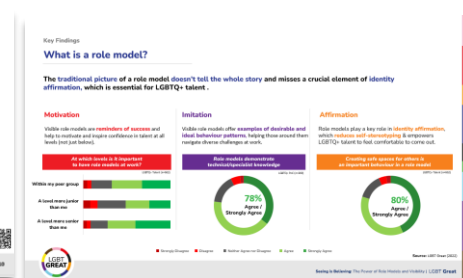
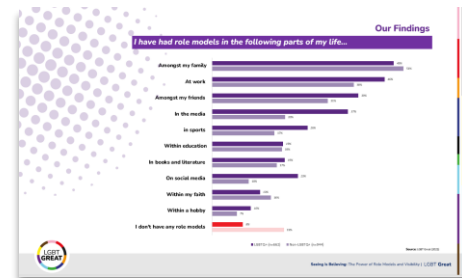
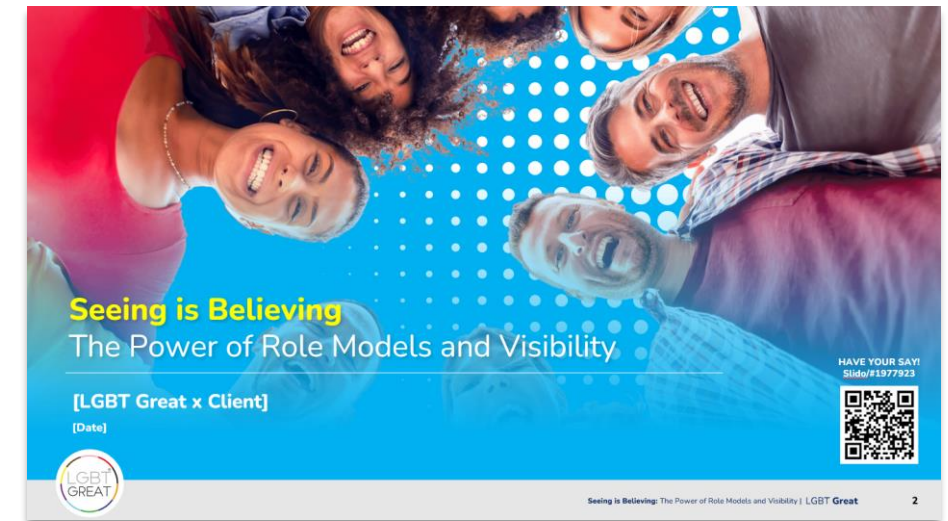
Intersectionality connotes the ways different parts of inequality, disadvantage, and identity overlap. How one part of someone's identity then interacts or intersects with another part, such as race and ethnicity, disability, socio-economic background, age etc., is explored by the concept of intersectionality.

Session Objectives:

- Discuss the findings from LGBT Great's report, *Seeing is Believing: The Power of Role Models and Visibility* (2023)
- Explore the question "What makes a role model?"
- Examine the impact that (LGBTQ+) role models have on those around them
- Discuss as a group what it means to be a role model in financial services in 2024
- Q&A

Sample polling questions:

"The one word that defines a role model for me is...?"



Bedrock of Solidarity (1) Introducing Intersectionality

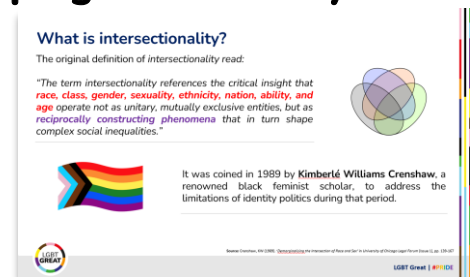
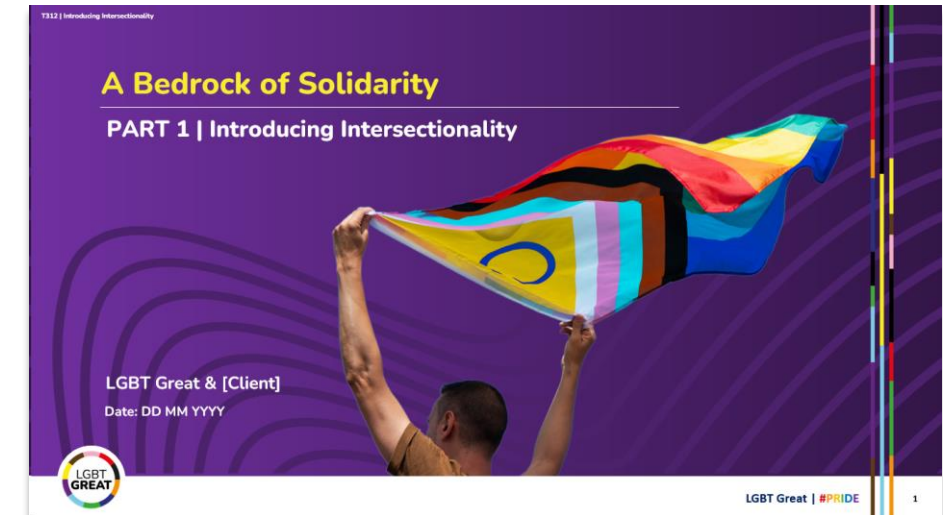
Intersectionality connotes the ways different parts of inequality, disadvantage, and identity overlap. How one part of someone's identity then interacts or intersects with another part, such as race and ethnicity, disability, socio-economic background, age etc., is explored by the concept of intersectionality.

Session Objectives:

- Gain a foundational understanding of intersectionality and its key principles through unpacking the terms “allyship” “privilege” “intersectionality.”
- Explore the lived experiences of individuals with intersecting identities by understanding the Wheel of Power and Privilege
- At the intersections – the latest data around the LGBTQ+ community
- Practical discussion of how intersectional allyship and engagement in a corporate DE&I context can help drive progress internally

Sample polling questions:

“When you hear the term “intersectionality” what is the first thing that comes to mind?”



Intersectional Allyship

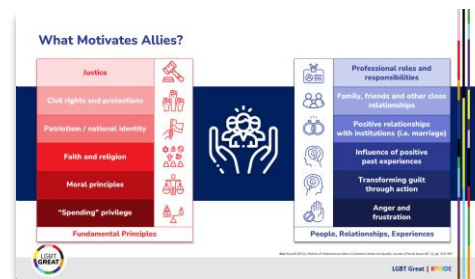
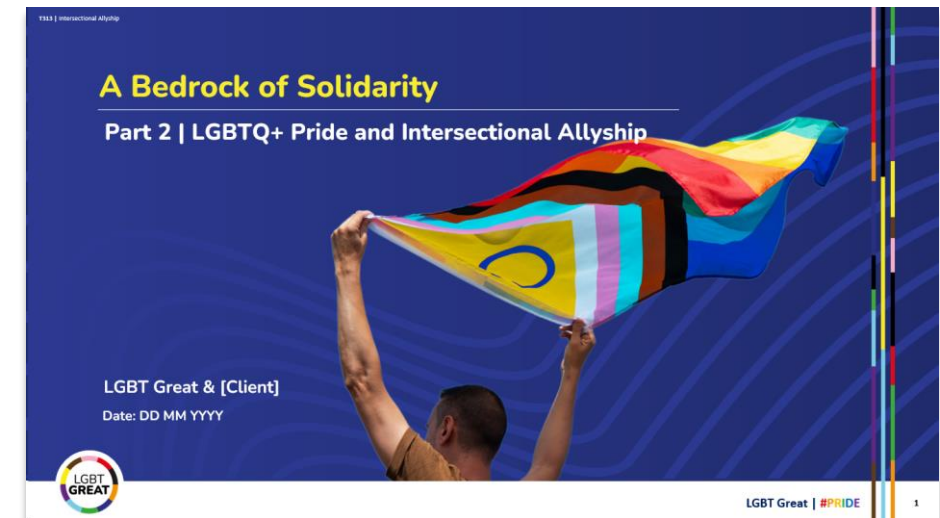
Allyship is rooted in understanding one's own privilege and identity. The first step in building a strong allyship foundation is self-reflection, which in many instances may require challenging and confronting your own privilege, power and biases.

Session Objectives:

- (Re)Exploring the relationship between “intersectionality”, “allyship”, “privilege” and “power”
- Understanding “inter-” and “intra-” group allyship
- What motivates allies?
- The 9 archetypes of intersectional allies
- Historical examples of intersectional allyship
- Practical tips: intersectional allyship for ERGs / networks

Sample polling questions:

“Which of the 9 types of intersectional ally do you think you are?”

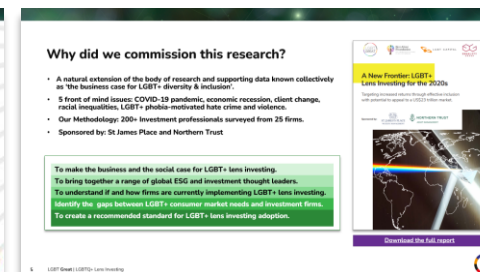
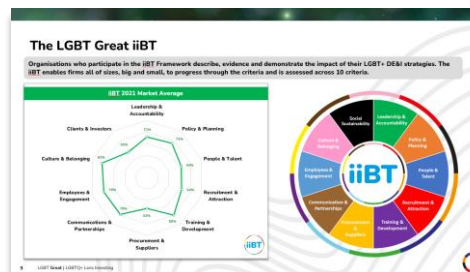


A New Frontier: LGBTQ+ Lens Investing

Investments are the lifeblood of financial services. Yet, LGBTQ+ sensitivities to investment strategies are woefully absent across the board. This is due to the size of the LGBTQ+ investible universe / scarcity of LGBTQ+ positive funds and the overall lack of data. In this session, LGBT Great encourages organisations to begin a new conversation internally around how this needs to change and, indeed, what change here even looks like.

Session Objectives:

- Introduce the concept of LGBTQ+ lens investing
- Explore the methodology, findings and recommendations from LGBT Great's report *A New Frontier* (2020)
- Understand the business, economic and human case(s) for LGBTQ+ lens investing as an investment approach
- Discuss how to overcome data challenges.
- Explore what a new frontier for LGBTQ+ investments looks like



DE&I Strategy for Networks

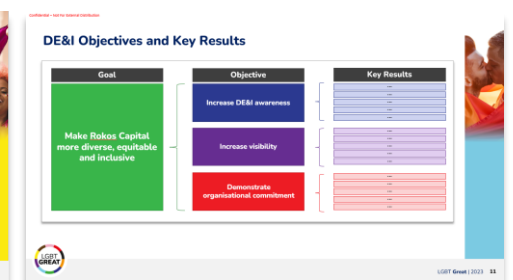
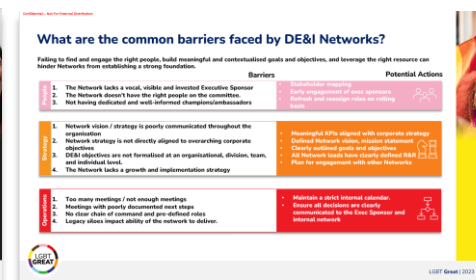
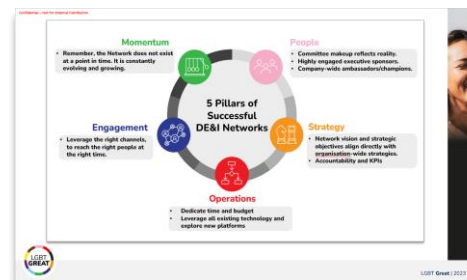
The role and potential impact of employee-led LGBTQ+ networks/resource groups cannot be overstated. In this session, LGBT Great how networks can build and maintain momentum in driving positive LGBTQ+ DE&I transformation internally. Through discussing some of the common challenges faced by networks and exploring what best practices we see across our 60+ Members, we intend to help LGBTQ+ networks both fledgling and mature to drive better engagement and change across their organisations.

Session Objectives:

- Share best practices from LGBT Great's corporate members around launching and maintaining an effective LGBTQ+ employee network.
- Discuss some of the key challenges experienced by networks.
- Propose a blueprint for success for new/mature networks alike.
- Create a space to discuss existing network strategy/challenges.
- Q&A

Sample polling questions:

"What do you think the greatest barrier to progress you are currently facing is as a network?"



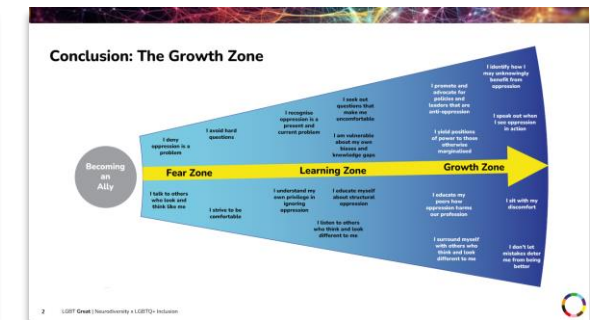


At the Intersections: Neurodiversity x LGBTQ+ Inclusion

We propose to run a session exploring the intersections of LGBTQ+ experience and neurodiversity. The focus will be on building a foundational understanding of inclusive practices that seek to empower, support and protect

Session Objectives:

- **Neurodiversity basics:** Terminology, brief history, misconceptions
- **Neurodiversity and LGBTQ+ community:** autism & ADHD, impact of intersectional discrimination against neurodiverse LGBTQ+ people
- **What's at stake?** The value of workplace neurodiversity
- **Neurodiversity:** inclusive policies and practices
- **Allyship and keeping the conversation going**
- **Q&A**





LV4: Pathways and Bespoke Training

Structure, Learning Objectives, Examples



Custom Training Pathways

Duration: 8-12 weeks / training Module

Objectives Include:

- **(Re)educate employees on the foundations of DE&I**
- **Explore the case for LGBTQ+ inclusion.**
- **Discuss the impact of intersectional allyship in an open and safe forum.**
- **Train people managers in using LGBTQ+ inclusive language.**
- **Better equip managers to support LGBTQ+ employees.**
- **Develop leadership skills to champion LGBTQ+ inclusion.**
- **Foster a culture of diversity and equity from the top down.**

Module Deliverables

- **Tailored training materials.**
- **Training sessions conducted for general population.**
- **Survey and feedback to feed into an engagement report**

All pathways include:

- **Any combination of LGBT Great's training sessions (3x training sessions delivered in-person/virtual as agreed)**
- **Dedicated event microsite** to capture sign-ups and track engagement
- **Clients able to select / "mix and match" from a list of 10 CPD-accredited training sessions***
- **Tailored content**
- **Flexible delivery style** (keynote, roundtable, testimonials)



Bespoke Training

Duration: 12 weeks

Why choose bespoke training?

- **Tailored to your needs:** We don't believe in one-size-fits-all solutions. We collaborate with you to identify your specific challenges and opportunities, crafting a training program that addresses your unique organisational context and employee demographics.
- **Intersectional focus:** We recognize the intersectionality of LGBTQ+ identities with other diverse groups. Our trainers are specialists in understanding and addressing the unique needs of different populations within the LGBTQ+ community, ensuring your training is inclusive and impactful.
- **Actionable insights:** Our training goes beyond awareness-raising. We equip your employees with practical tools and strategies to create a more welcoming and inclusive environment, fostering positive change at every level.

Module Deliverables


- Custom training on any topic of LGBTQ+ DE&I (and its intersections)
- Delivery of training session (virtually/in-person as agreed)
- All training materials – recording, slides, briefing

Bespoke training includes:

- 1x training session on a topic agreed between your organisation and LGBT Great
- Collaborative content development – 1x focus group with your employees to help the development of the content.
- 1x session delivery (virtual/in-person)
- Dedicated event microsite to capture sign-ups and track engagement



- **Pre-designed social media posts:** Engaging visuals and informative captions tailored to each training session topic, highlighting key takeaways and benefits.
- **Co-authored editorial content** (LGBT Great x Brunel) for publication as PR or blog content. Full usage rights for Brunel.
- **Dedicated event and social media support.**
- **Dedicated feature in:**
 - (1) LGBT Great News Digest (6,500+ readership)
 - (2) case-study in LGBT Great 2024 Impact report.



LGBT GREAT
8,429 followers
3mo • Edited •


As we step into November, we reflect on the incredible success of our recent event 'Shining The Light' in Scotland. **M&G plc**, in collaboration with LGBT Great, brought together a diverse mix of LGBTQ+ individuals and allies, laying the foundation for an inclusive community. Our deepest gratitude goes out to all who attended and contributed to the vibrant discussions and connections made.

This event marks the start of a series of impactful gatherings that will further bolster our commitment to diversity and inclusion in Scotland.

We are excited for the journey ahead and look forward to cultivating a supportive LGBTQ+ community within M&G.

Special Thanks to **Mark McLane, Joanna Rhule MCIPD, Jamie Oliver-Devlin, Pauline Lucas, Jade Stuart**, and many other M&G colleagues.

#ShiningTheLight #DiversityInFinance
#LGBTCommunity #LGBTAwareness #FinancialServices
#Empowerment #RoleModels #LGBTGreat




LGBT GREAT
8,429 followers
3mo • Edited •

Want to be a disruptor in the world of ESG? Join us in London for an ESG LGBTQ+ Lens Investing Roundtable. There was a way to redefine industry standards, promote diversity through your investment. <https://lnkd.in/eSqjraKB>

Did you know that ESG-focused companies weather market volatility more effectively? It's all about challenging conventions and pushing progress.

In-Partnership with **Janus Henderson Investors**


#ESG #Investing #ESGInvesting #LGBT #LGBTCommunity #FinancialServices #InvestingIndustry #LondonEvent #Events #Diversity #DEI #Inclusion #CorporateGovernance #Governance




LCP
powering possibility

Member Spotlight


LCP Shines Bright: A Pride Celebration at Camley Park Filled with Inclusion and Excitement!



LGBT GREAT



In-Person Event Janus Henderson INVESTORS



LGBT GREAT

Investing with Pride

LGBTQ+ Lens Investing

Member Roundtable

LGBT GREAT | Empowering the LGBTQ+ Community

For queries please contact: hector@lgbtgreat.com

LGBT Great's Social Media Channels:

LinkedIn
<https://www.linkedin.com/company/lgbtgreat/mycompany/?viewAsMember=true>

X (Twitter)
https://twitter.com/LGBTGreat?ref_src=twsrc%5Egoogle&twcamp%5Eserph&twq%5Eauthor

Facebook
<https://www.facebook.com/LGBTGreat/>

Instagram
<https://www.instagram.com/lgbtgreat/?hl=en>



Important information regarding pre-paid CPD accreditation with LGBT Great

Please note: This pre-purchase of CPD accreditation certificates with LGBT Great is non-refundable. However, any unused certificates you receive can be applied to future CPD training programs you undertake with us within a 12-month period.

Here's what this means:

- **Non-refundable purchase:** Once you purchase the package, the initial cost cannot be refunded, regardless of whether you use all the included certificates or not.
- **Future use of unused certificates:** Any certificates you don't use in your current training can be saved and applied towards the cost of future CPD programs with LGBT Great within the next 12 months. This allows you to spread the cost of your professional development over time and potentially save money on future training needs.
- **Planning is key:** We encourage you to carefully consider your upcoming CPD requirements before making this pre-purchase. Think about how many certificates you might need in the near future and whether this package aligns with your training goals.
- **Questions and support:** If you have any questions about our CPD programs, this pre-purchase option, or the use of unused certificates, please don't hesitate to contact us. We're happy to help you make an informed decision.
- **Expiration:** Any unspent CPD certificates included in this pre-purchase package will expire after 12 months from the date of purchase. Unused certificates cannot be carried over to future programs or refunded.





CONTACTS

Matt Cameron (he/him)
Chief Executive Officer | LGBT Great
[**matt@lgbtgreat.com**](mailto:matt@lgbtgreat.com)

DISCLAIMER

The information and guidance provided in this Proposal and throughout the programme of work outlines created by LGBT Great are intended for educational and informational purposes only. While efforts have been made to ensure the accuracy and relevance of the content, LGBT Great assumes no responsibility or liability for any risks, damages, or consequences that may arise from the implementation of the strategies outlined in this proposal and these Modules. Organisations agreeing to undertake this programme are encouraged to exercise due diligence and consult with appropriate professionals, legal advisors, and stakeholders to tailor the strategies to their specific context and requirements. These Modules are not a substitute for professional advice, and LGBT Great disclaims any warranties or guarantees, express or implied, regarding the completeness, accuracy, or suitability of the information provided. By engaging with these Modules, organisations acknowledge that they are responsible for assessing their unique circumstances and implementing the strategies at their own discretion and risk. LGBT Great shall not be held liable for any direct, indirect, incidental, consequential, or special damages resulting from the use or inability to use the information contained in these Modules. Organisations should be aware that laws, regulations, and best practices related to diversity, equity, and inclusion, as well as data privacy, may vary across jurisdictions. It is the responsibility of the organization to comply with applicable laws and seek legal advice as needed.