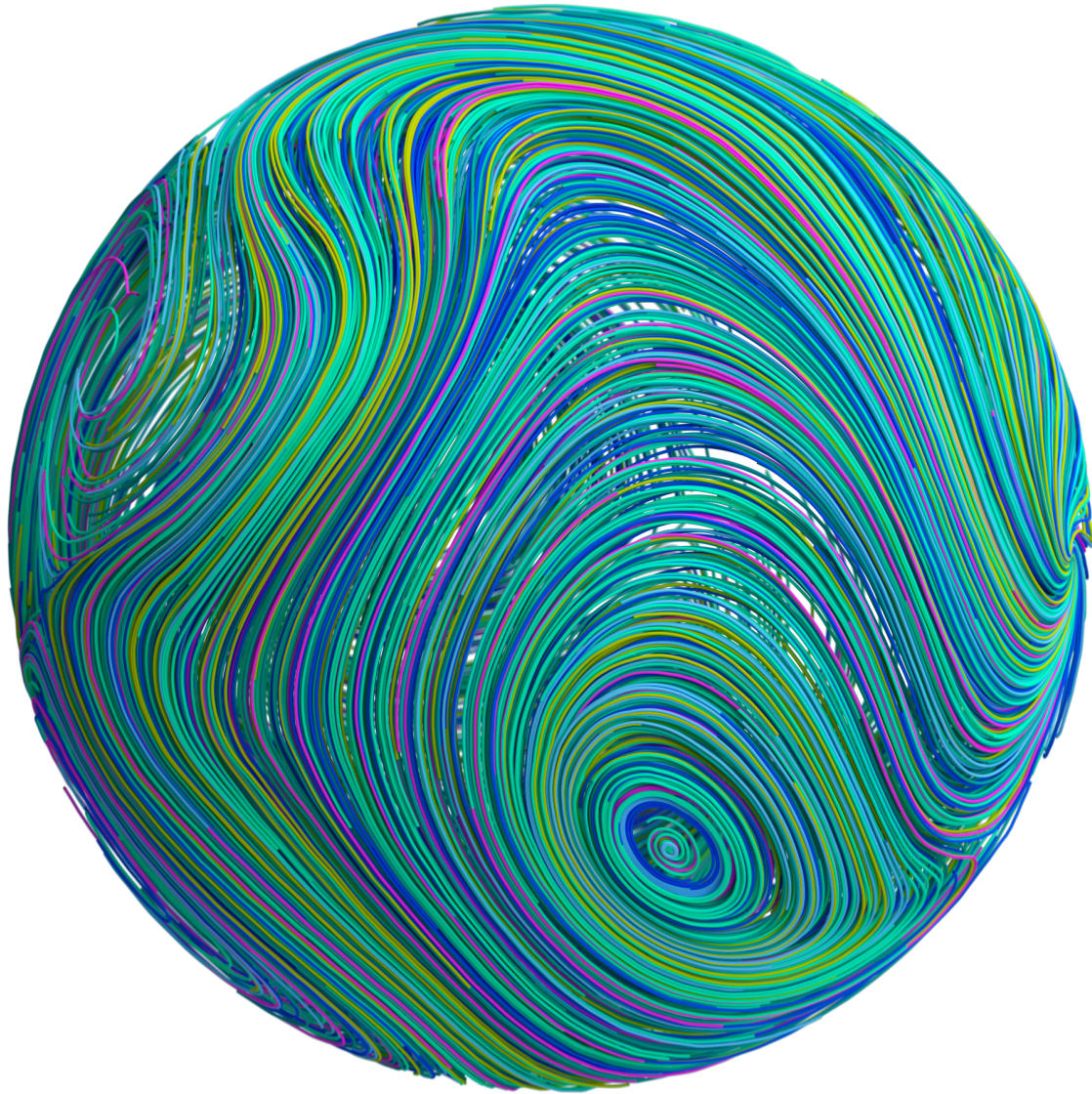


Deloitte.



Honoring identity
to activate equity

Deloitte's Self-ID journey



Our identities have extraordinary value.

They can bring purpose to our lives and perspective to each other and help us discover new ways to make an impact. The more individuals have an opportunity to reveal their identities, the more they can grow as individuals, and we can also grow as an organization. That's why we believe in the power of sharing our identities; Helping people to identify others as they identify themselves. And celebrating our people, not for how they fit into our culture, but for everything they bring to it.

Learn more about diversity, equity, and inclusion at Deloitte: <https://www2.deloitte.com/us/en/pages/about-deloitte/topics/inclusion.html>

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Initiating a professional-led Self-ID program

Deloitte's US organization is on a multi-year journey to enhance our self-identification (Self-ID) program so our people feel seen, which supports our Diversity, Equity, and Inclusion (DEI) ambition statement; to set the standard for DEI by creating the culture and systems that help ensure everyone is empowered to thrive as their exceptional selves and reach their full potential. We endeavored to expand on the identity options for employees to self-select their data, so we can identify our professionals as they identify themselves.

Our organization has been gathering legally required Self-ID information for several years, but in 2020, our National DEI team sought to better understand how the limited options presented to professionals made them feel and how to make it better.

"Self-ID is the way we enable and empower professionals to identify themselves within Deloitte at its most basic level. It's the vehicle by which people can share their identity with the organization," said Amy Smith, Talent Managing Director, Deloitte Services LP, who led the organization's Self-ID efforts.



"We view identity as personal, and it's not about how you fit in at Deloitte, it's about what you *bring* to Deloitte. We want to recognize and celebrate everyone's identity. It's also the foundation for everything we do in DEI. It gives us information about our workforce and allows us to look for ways to continue to activate equity."

The DEI team researched different identity categories used worldwide, connected with academics who study identity, and engaged in dialogue with our professionals about what their identities mean to them, how they see themselves, and received feedback on options to define more fully, restructure, or add categories and options to best reflect those identities.

Employees organization-wide made it clear that they wanted more options that better captured their multiple, overlapping, and intersectional identities—and understood the value of seeing a more meaningful reflection of themselves in our data and programming. As a result, we:

- Expanded options for:
 - Race and ethnicity
 - Sexual orientation
 - Veteran status
- Disaggregated sex and gender and added a wide range of options associated with gender
- Increased awareness of the breadth of the definition of a disability (e.g. neurodiversity)
- Added preferred name and name pronunciation fields
- Included options to identify military spouse status
- Added caregiver of adult and/or child

We believe that language is important, especially when it is used to describe individuals based

"Trust is built over time as people see the increasing benefits of Self-ID. For instance, we can send communications to offer timely support to those who have opted to receive communications based on their Self-ID when they may be directly impacted by social events. By consenting to communications based on Self-ID, they can stay informed, and better understand the meaning and value behind it."

– Denise Shepherd
National DEI Leader, Deloitte Services LP



“Many of our MENA colleagues have come to me with a great sense of pride in the opportunity to select an option that truly represents how they personally identify—pride in being seen, being heard, and most of all, pride in working at Deloitte.”

– **Mike Daher**
Leader, MENA & Allies Community
Principal, Deloitte Consulting LLP

on their unique and complex identity and lived experience. For example, for years, our Middle Eastern North African and Near Eastern (MENANE) colleagues, who represent a diverse mosaic of cultures, ethnicities, languages, and religions, did not see their identity represented in the existing options for race. Although they often selected ‘White,’ many did not feel that accurately reflected their identity. When we first offered MENANE as a race category, 0.9% of the workforce self-selected it. In an organization of our size, that translates to hundreds of people who in an instant felt more seen and included. Not long after receiving this data, a MENA & Allies Community was organized. The following year, the number of professionals who identified as MENA grew to 1.5%, including those who selected more than one race.

Mike Daher, Principal, Deloitte Consulting LLP, and leader of the MENA & Allies Community, believes the identification option is “huge,” not just for our workforce, but for the business community. “We are one of the largest organizations with MENA as a category, and as Deloitte is an innovator and leader in DEI, we have an opportunity to shape the MENA conversation across the broader marketplace.”

The MENA & Allies Communities' data-driven priorities center on equity, sense of community, and external impact. But perhaps more immediately, they're providing a sense of affirmation. “Many of our MENA colleagues have come to me with a great sense of pride in the opportunity to select an option that truly represents how they personally identify—pride in being seen, being heard, and most of all, pride in working at Deloitte.”

Similarly, for our Indigenous colleagues, some were apprehensive about selecting American Indian or Alaskan Native, so we expanded the identity options for clarity. We also created a way for people to share their tribal affiliation or community attachments.

We now present professionals with more comprehensive choices that support multiple identities of professionals Indigenous to the Americas:

- Native American, Alaska Native, or First Nations,
- Indigenous Mexican or Central American, and
- Indigenous South American.

Professionals also expressed that a single option for “Native Hawaiian or Other Pacific Islander” assumes a singular lived experience across many different individual identities. Members of the community asked for options that empower individuals to identify in a more specific way as either Native Hawaiian or Other Pacific Islander, or both.

Self-identifying Indigenous Deloitte professionals by the numbers

0.1%

our US workforce identifies as **Native Hawaiian or Other Pacific Islander**.

8.3%

of Deloitte professionals who are Indigenous to the Americas **shared a tribal affiliation in 2022**. Deloitte professionals represent many of the original peoples from lands across the United States, Central America, and South America.

1.2%

Of our US workforce, 1.2% **now identifies as one or more of the three new Indigenous to the Americas options**, up from 0.2% in our initial transparency report. This increase is primarily driven by clarity of definition.



Tania Mahealani duPont, Consultant, Deloitte Consulting LLP, applauded these changes: “There is no one ‘right’ way to be and navigate the world as an Indigenous person. Self-ID has provided more opportunities to capture these nuances and allow practitioners to reflect on their respective Indigenous identities in ways that better capture their own personal histories and ties to land. As a Pacific Islander, I am able to see my indigeneity represented and honored by Deloitte.”

Data integrity and reporting nuances

Our path to implementing a Self-ID program began with a current state data analysis, which included questions and considerations such as:

- What data already exists in the system?
- At what point in the talent life cycle was data captured?
- Where was the data stored, and where did it flow?
- Which teams used the data and for what purpose?
- How complete is the data?
- What are the regulatory considerations for each country the organization operates in?
- How can feedback be leveraged to continuously evolve and enhance organizational identity data to drive equitable outcomes?
- What is the downstream impact of adjusting the data set? Which teams rely on data for employee benefits, legal and regulatory compliance and reporting?

Once the data is collected, we aggregate it to align with regulatory reporting requirements including the Equal Employment Opportunity (EEO) race categories. As a result, some of the racial options added are rolled up into broader categories for regulatory reporting purposes.

We inform our workforce that these categories generally reflect a social definition of race as recognized in the US, and are not an attempt to define race biologically, anthropologically, or genetically. We also enable individuals to choose to report more than one option to most accurately represent how they identify.

The same is true for regulatory reporting of gender and biological sex. Since not everyone’s gender identity matches their sex assigned at birth, we disaggregated sex and gender categories. We added options to both fields and reported aggregated data to align with benefits requirements.

Our information technology systems colleagues had to determine which systems use identity data, who uses those systems, and how changes could be made to meet current and future state identity needs.

We work collaboratively to determine which specific data fields are needed, whether options could be adjusted within fields without disrupting existing processes, where data is stored, and how data flows within and across our various data repositories.

Identity through a global lens

Deloitte is structured as several “member firms” across the globe. The Deloitte US member firm includes locations in the United States territories as well as a few other geographic locations. Thus, we need to consider the regulatory requirements as well as cultural nuances in how people identify in those geographies.

Outcomes of implementing a Self-ID program

Professionals can feel seen and valued

Expanding Self-ID allows professionals to see themselves and their intersecting identities represented, and it can actually have profound impact on the lives and mindset of the individuals who spend much of their time in our workforce. Many see Self-ID as a signal that who they are matters. For example, when we disaggregate categories like sex and gender and expand LGBTQIA+-related options, we are able to better capture gender as a spectrum and a wide range of gender and sexual orientation identities. We also disaggregated the reporting of race and ethnicity, two different and separate social constructs. Race is about immutable physical characteristics of a person, and ethnicity is more about a shared culture.

Better data to drive equitable outcomes

Our organization understands that the work to achieve equity includes measurable outcomes that are guided by data-driven insights. The information we gather provides valuable insights

and data that can inform DEI-related goals and strategies, program decisions, and help drive equitable outcomes across the talent lifecycle. Self-ID data is comprehensive and incorporated into our [annual transparency report](#), which helps inform our DEI work. Enabling professionals to identify in the ways that are important to them and using that information to continue to improve how we show up for our people, clients and communities is critical to our continued growth and success.

Increased sense of belonging and community

When completing the online Self-ID form, professionals are given the opportunity to opt in to receive identity-specific communications, including newsletters, programming, event invitations and community connections.

As Linda Bohnert, Inclusion & Belonging Managing Director, Deloitte Services LP says, "Self-ID data helps us better understand our workforce, but it's the people within the communities sharing their lived experiences, informing our overall DEI strategy, and creating events and programming that reflect who they are—that is what brings it all to life."

Earned trust

We recognize that sharing identity information may not feel comfortable for everyone and may be met with some resistance or skepticism. This is where trust and transparency are key. During each Self-ID campaign, we reinforce that Self-ID data is not used for hiring, staffing, promotion, or other employment-related decisions, but rather provides observations and insights to better understand and engage our workforce and inform our Talent and DEI strategy.

"By disaggregating sex and gender and evolving the options presented for gender identity and sexual orientation, we've been able to provide people with options that better match who they are. For those who do not often see their own identities represented in options that they're asked to select—myself included—this is a big deal."

- Andre Alexander
Manager, Deloitte Services LP



Valuable investment in an organization and its people



The Self-ID program enables enhanced data transparency, innovates DEI programming and analyses, and helps foster connections within relevant communities.

Having championed Self-ID as Deloitte's previous Chief DEI Officer and now a technology practice leader, Kavitha Prabhakar, Principal, Deloitte Consulting LLP, knows how powerful this investment can be: "As a result of Self-ID, our people are more empowered to tell us how they see themselves and have a wider range of options that can accurately reflect their overlapping identities and lived experiences. Our Self-ID journey continues to be an appreciation of the intersectionality of identities and the complexity of our world—working to ensure our people feel like they can share their whole selves with the organization and not feel like that will impact their professional outcomes. I believe equity is achieved when your identity does not impact your outcomes, and that's why this is such an important investment. The more people feel comfortable sharing their identities, the more confident we can be that we're advancing equity."

One of the most important lessons we learned throughout our multi-year journey, is how critical it is for an organization's Self-ID program to grow and adapt

alongside the evolution of the identities that comprise it. Since expanding our Self-ID options, we have seen a significant increase in participation rates, and an increase in our data completeness rates from 65% to 85% in the 2023 Self-ID campaign.

At Deloitte, diversity, equity, and inclusion are core to our values; celebrating our people not for how well they fit into our culture, but for everything they bring to it.

Lessons learned

- 1 Begin the Self-ID journey with input from employees**
Their needs can help guide the program to get to the most inclusive outcome. Lean on national community leaders and teams—often referred to as Employee Resource Groups—for input on how their respective communities identify.
- 2 Communicate how data will and will not be used**
Engage early with information technology, legal counsel, and talent/HR teams who use the data, for example, the insurance benefits team. Work closely with senior leaders to determine what data will help advance equity throughout the organization.
- 3 Collaborate early on an Information Technology approach**
While it may seem that our DEI professionals were the most important players in implementing Self-ID, our IT professionals were similarly instrumental.
- 4 Engage leadership throughout the process**
DEI leaders might benefit from engaging their executive leadership team as Self-ID aggregated data can be used to advance equitable outcomes in different organizational processes.

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About the DEI Institute™

The DEI Institute is part of Deloitte's Purpose and DEI Office and is core to the organization's efforts to shape the future of DEI and help build towards a more equitable society.

Learn more about Deloitte's DEI Institute at www.deloitte.com/us/deiinstitute.

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