

## Case 8: Characteristics of an Inclusive Workplace

Emily is a senior accountant at a large accounting firm called Ledger International. Emily also identifies as a transgender woman. She's worked at Ledger for over ten years and two years ago, when she began her transition, she had the full support of the firm. Before her transition, Ledger provided training on how to support employees undergoing a transition, beginning their transition, or who have fully transitioned. Emily soon shared that she was going to work toward completing her transition with an HR representative, and she wanted to know what resources the organization offered to support her. She was told that she was eligible for health benefits, counseling, and paid leave for any medical procedures she may undergo.

Emily felt incredibly supported by Ledger. Her coworkers were friendly and supportive, and her manager asked what he could do to support her during her transition. Although the firm had private washrooms on every floor, it was in the process of installing gender-inclusive washrooms. Emily was even able to start a 2SLGBTQI+ employee resource group for other employees who wanted to help support gender-inclusive initiatives at Ledger. The group had all the necessary resources and support from the executive team.

Emily always felt as though her workplace was one of the most inclusive places to work. She tells this to her friends and always shows her support for the firm on their social media posts. To Emily, Ledger was always looking for ways to improve and always receptive to any feedback.

One day, Emily's team has to meet off-site with a client to discuss their upcoming audit. She knows the audit will take up to three months to complete; it's a big job! She's looking forward to working on the assignment and knows her team will do an excellent job.

When the team arrives at the client's office, they greet one another. Everyone seems nice. They spend the next few hours reviewing the details of the assignment, the expectations and goals, the deliverables, and the loose deadlines. After lunch, Emily needs to use the washroom, but there isn't a gender-inclusive washroom. She has to choose between the men's room and the women's room, neither of which feel right, especially given she's mid-transition.

Emily is used to this. She knows it's uncommon for buildings to have a gender-inclusive washroom. She looks for a private washroom but can't find one. She decides to use the women's room. While washing her hands, another female accountant enters the washroom and stops short. She stares at Emily wide-eyed, making her feel very uncomfortable. Emily leaves the washroom without drying her hands. She wants to get out of there as fast as she can.

Emily is in the midst of her gender affirmation surgery, but hasn't completed the process yet. That day, she was wearing a white blouse, a blazer, and dress pants. She's never felt like she has to dress like a woman at the Ledger office because everyone knows and accepts her background. Other women don't have to wear feminine clothes to prove they're a woman, so Emily doesn't feel that she should have to either.

The next day, Emily's team returns to the client's office to finalize the project plan. Wanting to avoid a repeat of yesterday's washroom incident, Emily avoids using the washroom entirely. She drinks very little water, and even considers skipping lunch. But this is not how she wants to spend the next three months working on this project. She emails her manager asking if they could meet in the Ledger office tomorrow for a one-on-one meeting.

The next morning, Emily meets with her manager, José, and tells him about her experience. José is sympathetic. "It's really unfortunate that people still think this way," he says. "What can we do to help fix things?" "I don't know," Emily responds, "I just know that I'm uncomfortable."

What Emily doesn't tell José is that she is disappointed with Ledger. As inclusive as they are in their workplace, there are other factors to consider when claiming to be an inclusive employer. She knows she can't ask for them to build new washrooms at the client's office, but she doesn't want to feel uncomfortable about her identity yet again. José and Emily decide that she'll no longer work on the audit and will work on another team, a team she's familiar with, to work on a different audit.

Questions:

- (1) How do you feel about the way José handled Emily's situation? Is there something else he could have done to show empathy? What would you have done if you were José?
- (2) What are Emily's responsibilities in this situation, if any? Was she required to tell José what happened? Why didn't she immediately tell him that she was uncomfortable?
- (3) Where does the dedication to DEI work stop for organizations? Think about DEI work and what it means internally (i.e., for staff, internal communications, business processes and systems) and externally (i.e., for clients, the community, etc.). Do the organizational leaders have any responsibility in this situation?
- (4) Why does Emily feel so comfortable at Ledger? How is Ledger's company culture welcoming and supportive?
- (5) What could Emily's next steps be? Ledger's? The client's? What are some practices, systems, or initiatives that could be introduced moving forward?

Additional Resources for Case 8:

- What An Inclusive Workplace Actually Looks Like, And Seven Ways To Achieve It (article by Forbes), [here](#)
- How to Be an Antiracist (book by Ibram X. Kendi), [here](#)
- So You Want to Talk About Race (book by Ijeoma Oluo), [here](#)
- Fostering an inclusive culture at work (analysis by Deloitte), [here](#)
- 8 Reasons Why Diversity And Inclusion Are Essential (article by Forbes), [here](#)

## Resources for Supporting the Trans Community in the Workplace

- [Creating a Trans-Inclusive Workplace](#) *Harvard Business Review*
- [Resources for managers and colleagues of transgender employees](#) *University of Washington*
- [Learn How Employers Can Support Transgender Rights in the Workplace](#) *ADP*
- [Being transgender at work](#) *McKinsey & Company*
- [How to Help Your Transgender Employees Feel Safer at Work](#) *Built In*

## Resources for Understanding the Trans Experience

- [2SLGBTQI Glossary of Terms](#) *Egale*
- [The Genderbread Person](#) *It's Pronounced Metrosexual*
- [What is Transgender? Simply Explained](#) *Educational Videos & Lectures*
- [Access to Justice for Trans People](#) *Canadian Bar Association*
- [Impacts of COVID-19 on Trans and Non-Binary People in Canada](#) *BMC Public Health*
- [Transgender Community Faces “Astronomical Gap” in Health-Care System, Advocates Say](#) *Global News*
- [Trans Workers Disproportionately Impacted by Harassment, Violence at Work](#) *Canadian Labour Congress*
- [Transgender People of Colour Face Unique Challenges as Gender Discrimination and Racism Intersect](#) *The Conversation*

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