

Jewish Organization Equality Index 2012



כבוד הבריות

**kavod
habriyot**

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About the Charles and Lynn Schusterman Family Foundation

The Charles and Lynn Schusterman Family Foundation is committed to strengthening the Jewish people, public education in the United States and its hometown of Tulsa, OK. The Foundation achieves its mission by enhancing the lives of young people through high-quality education, identity development, leadership training and service opportunities. Within the Jewish world, the Foundation ensures vibrant Jewish life by empowering young people to engage in meaningful Jewish experiences, build inclusive Jewish communities, connect with the State of Israel and repair the world. The Charles and Lynn Schusterman Family Foundation is part of the Charles and Lynn Schusterman Philanthropic Network. www.schusterman.org

About The Morningstar Foundation

The Morningstar Foundation is a family foundation which awards grants to pre-selected organizations dedicated to strengthening the Jewish community in the United States, in Israel, and throughout the world, enhancing educational opportunities for inner-city youth, protecting the environment, and safeguarding civil liberties.

About Stuart Kurlander

Stuart Kurlander, currently President of the Jewish Federation of Greater Washington, has a long history of involvement in the Jewish community. At present, he also serves on the Board of Trustees of the United Jewish Endowment Fund. He was also the first National Board Chair for Keshet and the Founder and past Chair of the Kurlander Program on Gay and Lesbian Outreach and Engagement at the District of Columbia Jewish Community Center, the first program of its type at a Jewish Community Center. He was the National Chair of the first UJC LGBT Pride Mission to Israel in 2005. Professionally, Mr. Kurlander is a Washington, D.C. Partner of the international law firm, Latham & Watkins, LLP.





Jewish Organization Equality Index 2012

3 Letter from HRC Foundation President

5 Introduction

6 14 Steps organizations can take to be more welcoming and inclusive
of LGBT families, couples and individuals

9 Executive Summary

13 JOEI Scores

14 Findings

14 Organizational Inclusion Efforts
20 Community and Client Engagement
24 Workplace Policies and Practices
29 Sub-Groups within the Survey

34 Survey Participants

37 How the JOEI Scores were Calculated

40 Survey and Population Development

42 Conclusion

Appendices

44 Appendix 1. JOEI Organizations and Scores
48 Appendix 2. JOEI Survey Questions
62 Appendix 3. LGBT Programming in Jewish Organizations
65 Appendix 4. Jewish LGBT Organizations
67 Appendix 5. Glossary of Terms

68 Acknowledgments

69 Advisory Board Members

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It's with great excitement and pride that the Human Rights Campaign presents our report on the Jewish Organization Equality Index (JOEI). Thanks to the generosity of our funders, the JOEI advisory board and the hard work of the HRC Foundation staff, we've created a snapshot of current efforts across a broad range of Jewish organizations to promote lesbian, gay, bisexual and transgender inclusion.

Based on these findings, and building upon the pioneering work of other groups within the Jewish community, the JOEI is also a roadmap for how future initiatives may take shape. JOEI is designed to recognize the successes and efforts already in place, encourage progress where there's room for advancement and create a benchmark against which to measure future progress. Throughout the survey, the emphasis is on connecting organizations with resources available through the HRC Foundation and other LGBT organizations to help them become more inclusive and welcoming to the LGBT members of their communities.

Helpful resource guides that include best practices and practical suggestions for implementation, as well as thought-provoking videos are now available online at www.hrc.org/joei.

More than 200 organizations participated in the survey and much of what we discovered was positive. In all three categories of analysis: organizational efforts, community outreach and engagement and workplace

policies and benefits, **every organization that responded to the survey has taken steps to improve LGBT diversity and inclusion.** Of the 89% that offer insurance to employees, an overwhelming majority—94%—allow same-sex partners or spouses to enroll in health insurance coverage.

While many Jewish denominations have voiced their support of LGBT equality, there are still important strides to be made. The JOEI illuminates new paths toward full participation and equality for members of the Jewish LGBT community.

At its heart, JOEI amplifies the essential Jewish value of kavod habriyot; the belief that every person deserves basic dignity and respect. JOEI is also the first initiative of its kind to not only invite Jewish organizations to reflect upon the issues of inclusion, engagement and justice for the LGBT community, but to provide a framework for the discussion.

I extend my sincere thanks to the organizations and individuals that participated in the survey, and I encourage all Jewish organizations seeking ideas to better serve their LGBT members to use the wealth of information and resources available through the JOEI.

Chad Griffin
HRC Foundation President

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Introduction

The goal of the Jewish Organization Equality Index is to facilitate a dialogue within the broadest possible cross-section of Jewish community organizations on how they support the inclusion of their lesbian, gay, bisexual and transgender members and employees. It adds to the significant work done within the Jewish community that has long worked to create an environment where LGBT Jews feel valued and welcomed in their respective organizations. It combines those efforts with the benchmarking experience of the Human Rights Campaign Foundation to create a snapshot of LGBT inclusion in the Jewish community and paint a picture of where further efforts may be directed.

Moreover, rather than seek to endorse or condemn any individual activities, the JOEI survey process and report are designed to provide for continuing educational opportunities and to highlight best practices. During the fielding of the survey, JOEI staff also created a series of resource guides based on various topics in the survey. These resource guides, easily found on the JOEI website (www.hrc.org/joei), focused on inclusive organizational programming and practices, eldercare facility practices, workplace practices, employee benefits, transgender inclusion, inclusive youth organization practices and others.

While conducting the survey, HRC staff held individual interviews with each organization to highlight areas for improvement and provided references for how to do so. This report highlights 14 steps each organization can take to be more welcoming and inclusive of LGBT families, couples and individuals (page 6).

The JOEI survey seeks to create a baseline measurement of current practices within Jewish non-profits toward LGBT employees and community members. JOEI evaluated an

organization's employment policies, as well as an organization's programs and practices when interacting with its LGBT participants and clients.

The survey sought information about an organization's practices in several areas including:

- Overall Organizational LGBT Practice
- Images, Language and Communication
- Non-Discrimination or Equal Employment Opportunity Policy
- Benefits
- Transgender Inclusion

The JOEI survey revealed broad familiarity with LGBT inclusion and a willingness to do more. Many organizations used the survey to go on record about their support for equality. Others saw it as an opportunity to learn about best practices. This report summarizes the survey process and findings and points to areas where more work can be done, as well as highlights organizations whose work on diversity and inclusion shined.

The Jewish Organization Equality Index is a groundbreaking report. JOEI marks two firsts: It is the first effort by HRC to rate faith-based organizations on LGBT equality, and HRC's first time benchmarking progress in the non-profit sector.



14 Steps

organizations can take to be more welcoming and inclusive of LGBT families, couples and individuals

1. Adopt an **equal employment opportunity policy or non-discrimination policy** that includes sexual orientation and gender identity and/or expression
2. Provide **equal benefits** to employees' same-sex spouses and partners and non-biological children
3. Ask your insurance company to **remove discriminatory exclusions** for transgender healthcare coverage
4. Reach out to **local LGBT organizations** for expertise on programs, advice on communications, training opportunities and other partnerships
5. Include the **LGBT community** when undertaking diversity measures, including diversifying board membership, providing diversity training, posting job advertisements and setting up special working groups to address diversity
6. Utilize **inclusive external language**, images and membership materials
7. Provide **LGBT-specific programming** or include LGBT content in your organization's general programming
8. Include a **welcoming statement** on your organization's website that discusses your organization's commitment to diversity, including those with different sexual orientations and gender identities
9. Advertise your organization in a **local LGBT newspaper or group website** or, for religious institutions, include your organization on a welcoming religious institutions list
10. **Establish fair practices** with regard to dress codes, restroom usage and personnel files that enable a person to be comfortable in their full-time gender presentation
11. **Provide resources for affiliates** on how they can be inclusive
12. Create a fully inclusive, **enumerated bullying policy** when providing youth programming
13. Discuss LGBT issues, particularly bullying, family structures and gender stereotypes, when providing **training** to youth participants or staff who interact with youth participants
14. Become involved in the movement for **LGBT equality** through advocacy and local initiatives



Executive Summary

The Jewish Organization Equality Index (JOEI) is a bold, first-of-its-kind effort by a faith-based community in the United States to engage in an introspective self-assessment of how its organizations treat lesbian, gay, bisexual and transgender people in their workplaces and in their work.

In order to remain relevant in the lives of their members and to grow with an increasingly diverse constituency, organizations must understand the unique life experiences and spiritual needs of people they serve. Similarly, respecting individual differences in the workplace leads to a more productive work force, saves costs by lowering employee turnover, helps recruit new talent and ultimately leads to a better work product.

This project was initiated by leaders within the Jewish community that sought the help of the Human Rights Campaign, the nation's largest LGBT civil rights organization, to guide the process of self-evaluation by creating a numerical index and survey that would provide objective, measurable results about organizations and then make those results public to provide a mechanism for others in the community to hold organizations accountable.

The JOEI initiative consisted of an online survey that contained more than 89 substantive questions, each measuring a different aspect of how organizations address LGBT diversity and inclusion and focusing broadly on three main categories of practices:

- **Organizational Inclusion Efforts**
Actions and programs that encourage contributions from the LGBT community and foster diversity and an inclusive environment within the workplace.
- **Community/Client Engagement**
Programs specifically for LGBT members and clients, including programs and facilities designed for youth and the elderly.
- **Workplace Policies** Policies and programs in place that support LGBT employees of the organization.

Utilizing standard indexing protocols (e.g., applying "weights" and numeric values to survey items), an organization's responses have been calculated and expressed as a single JOEI score. The scoring rubric from 0 to 100 was divided into four categories: inclusion (at the high end), adaptation, exploration and contemplation (at the low end).

The inaugural JOEI effort extended invitations to participate to 2,172 Jewish communal organizations, from major national advocacy groups to small, local non-profits to synagogues. In the end, 204 organizations participated. The participation rate is comparable, but slightly lower, than the rate

Many organizations expressed they thought they were doing all they could to be inclusive. The most significant take-away from the survey was the need to be more intentional, either in language, images or programs.

**Findings at a Glance**

For a complete look at JOEI results, go to Appendix 1 on page 44.

Organizational Inclusion Efforts**90%**

of organizations include one or more inclusive terms in their publicity materials

98%

of membership-based organizations offer family memberships to same-sex couples and families or would do so if approached

79%

of organizations expressed they have not specifically targeted the LGBT community in recruitment efforts in the past three years

garnered by the first HRC Corporate Equality Index (CEI), which was 13%. Based on HRC's experience with the Corporate Equality Index and Healthcare Equality Index (HEI), future JOEI efforts will garner ever-higher participation rates.

Fifty percent – or 102 organizations – of groups that participated achieved the highest rating of "Inclusion." Twenty-seven percent received the next highest rating of "Adaptation." The final two categories "Exploration" and "Contemplation" received 13% and 10%, respectively. By contrast, in the first year of the Corporate Equality Index only 13 organizations received the highest score, or only 4% of the 319 that were rated.

The larger number of high performers may be partly explained by the passage of ten years from the first CEI in 2002 to the first JOEI survey and the growing acceptance of LGBT people that that decade brought. But the magnitude of the difference suggests that Jewish organizations as a group have been more progressive in addressing LGBT equality than other sectors of American society. The absence of comparative studies with other faith-based communities makes it difficult to draw a firm conclusion in this regard, but interviews with hundreds of survey participants revealed a strong desire to learn about the issues and willingness to be open and accepting of different sexual orientations and gender identities.

Jewish organizations mirrored common geographic differences within the United States concerning attitudes toward the LGBT community. As a group, Jewish organizations in the Northeast scored higher on the JOEI than those in other regions of the country.

Assigning the numbers one through four to the JOEI rating categories from inclusive (where inclusive = 1) to least inclusive (where least inclusive = 4), groups in the Northeast scored 1.70, groups in the West scored 1.86, groups in the Midwest scored 1.90 and groups in the South scored 2.35.

Organizational Inclusion Efforts

More broadly, Jewish communal organizations of all types are showing inclusiveness of LGBT people in their use of language and images, membership options for LGBT families, and partnerships with local and national LGBT groups.

Ninety percent of organizations answered that they included one or more inclusive terms in their publicity materials – including pamphlets, websites and any other outward-facing communication platforms. The terms used include:

- Significant other; partner (when referring to individuals in a relationship); sexual orientation, gender identity and/or expression; gay and lesbian; lesbian, gay, bisexual and transgender or gay, lesbian, bisexual or transgender (LGBT/GLBT); same-sex and/or same-gender; "parent 1/parent 2" or "guardian 1/guardian 2" instead of "mother/father."
- Sixty percent of organizations answered that they have used pictures of LGBT couples or families in their publicity materials. Organizations were particularly open to highlighting accomplishments of their own members, including marriages. One hundred percent of organizations said they have included lifecycle

100%

of organizations that have a newsletter said they have included lifecycle announcements (such as marriages) for same-sex couples in their newsletters, or would do so if approached.

Findings at a Glance

For a complete look at JOEI results, go to Appendix 1 on page 44.

Community and Client Engagement

66%

of organizations actively reach out to the LGBT community to attract members or clients

49%

of local organizations provide some LGBT-specific programming

33%

of organizations have a written anti-bullying policy

announcements (such as marriages) for same-sex couples in their newsletters, or would do so if approached.

- Ninety-five percent of participating synagogues responded that they used inclusive language and 61% use inclusive images in their external communications.

Community and Client Engagement

Ninety-eight percent of membership organizations surveyed offer same-sex couples and families family memberships, or would do so if approached. Although most organizations do not have stand-alone LGBT-specific programs for their membership, 66% of respondents said they actively reach out to the LGBT community to attract members or clients to their general programming. Common actions included placing their organizations on a directory of welcoming religious institutions kept by local or national LGBT groups, disseminating membership information through local LGBT groups, advertising in local LGBT newspapers or websites and including a welcoming statement on general advertisements that makes it explicit that diverse groups, including LGBT families, couples or individuals, are welcome.

A majority of respondents, 55%, said they had reached out to local or national LGBT organizations in the past three years for advice on programming and to help attract LGBT community members. In follow-up interviews, some groups said their own LGBT members suggested reaching out to LGBT groups, while others relied on LGBT organizations as their only source of expertise.

Yet, there are opportunities not currently being employed by most Jewish communal organizations that are used in many workplaces. These include work force training and targeted recruitment efforts that are common in corporate America and are designed to proactively bring educated voices into an organization to help them better serve the LGBT community.

Fifty-nine percent have not completed diversity or inclusion training of any kind in the past three years. Seventy-nine percent of organizations said they have not specifically targeted the LGBT community in hiring efforts during the past three years.

In lieu of work force development programs, the presence of LGBT individuals on an organization's lay leadership board was described in many cases as the single most important catalyst to greater awareness, understanding and inclusion within the organization. Still, 75% of organizations have not specifically recruited LGBT individuals to their lay leadership board in the past three years.

Workplace Policies and Practices

Borrowing from the extensive research on workplace benefits in the Corporate Equality Index, the JOEI asked each organization about non-discrimination policies, protocols for managing a gender transition in the workplace and benefits to LGBT employees and their families. Although some of the small organizations surveyed had not crafted any human resources policies, those that had were largely inclusive of the LGBT community. Of the 160 organizations that provide health

Room for Improvement

There's no need to reinvent the wheel. The organizations in Appendix 4 on page 65 provide a wealth of resources and support for LGBT Jews and Jewish leadership. Find out what others are doing to create a more inclusive environment and welcome the LGBT members of their communities.



Findings at a Glance

For a complete look at JOEI results, go to Appendix 1 on page 44.

Workplace Policies and Practices

73%

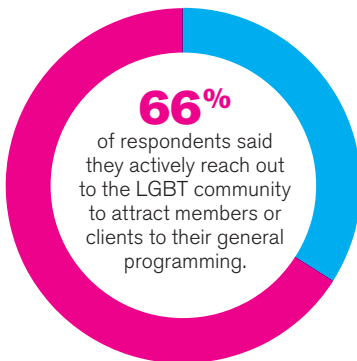
of JOEI respondents have a written non-discrimination policy; **89%** of these include "sexual orientation" and **48%** include "gender identity" or "gender identity expression" — about the same as Fortune 500 companies with such policies

91%

of JOEI respondents provided Shiva leave as an employee benefit

99%

of JOEI respondents allow leave for a same-sex partner



insurance coverage to their employees and employees' spouse or partner, 94% allow same-sex partners or spouses to enroll in health insurance coverage. Shiva leave, FMLA leave and COBRA continuation coverage for same-sex partners were widely available with 99, 96 and 92% reporting inclusive policies, respectively.

Written non-discrimination policies are the foundation of an organization's diversity and inclusion efforts. Enumerating policies to include sexual orientation and gender identity is the most visible way to communicate inclusion and may be the only source of protection from discrimination for LGBT people, because there is no federal law that prohibits discrimination on these bases.

Seventy-three percent of organizations surveyed have a written non-discrimination policy. Eighty-nine percent of these include the term "sexual orientation" and 48% include the term "gender identity" or "gender identity and expression." This is approximately the same proportion as the number of Fortune 500 companies with such policies.

All of the 94 organizations with youth programming have strict guidelines for interactions with and among youth. However, written, stand-alone anti-bullying policies for staff and youth are uncommon. Two-thirds of locations with youth programming — or 64 organizations — do not have a written anti-bullying policy, while only 33% do. Among those that have a written policy, only ten organizations included the term

"sexual orientation" and five included "gender identity." To be more welcoming and inclusive of LGBT youth, these groups have an opportunity to create a fully inclusive, enumerated anti-bullying policy that explicitly prohibits bullying based on sexual orientation and gender identity.

Finally, the JOEI survey revealed a lack of experience on the part of employers concerning policies and benefits for transgender people, but also a strong willingness to accommodate valued employees who transition at work.

Throughout the survey process, HRC staff worked with survey participants to suggest areas for continual improvement. The overwhelming majority of Jewish communal organizations that participated in the inaugural JOEI effort were receptive to participation and eager to demonstrate their commitment to equality. Often, however, simple steps that could have been taken were overlooked. And a common, albeit unhelpful, refrain was "everyone knows we are welcoming." This mindset led organizations to forgo deliberate efforts to be more inclusive.

HRC will continue to direct interested organizations to the available resources in the community. With each subsequent fielding of the JOEI, Jewish communal organizations will have opportunities to become more familiar with the actions they can take, large and small, to be more fully inclusive of and equitable toward those LGBT individuals in their communities of practice.

JOEI Scores

50% | **102**

survey respondents achieved
the top JOEI rating, “Inclusion.”

Inclusion 102
Adaptation 55
Exploration 26
Contemplation 21

Assigning numerical values to the four categories as follows:

Inclusion – 1
Adaptation – 2
Exploration – 3
Contemplation – 4

JOEI Score, by Geography

Northeast – 1.70
South – 2.35
Midwest – 1.90
West – 1.86

JOEI Score, by HQ or Local Org.

HQ – 1.50
Local – 1.88

JOEI Score, by Presence of Youth Programs

Does NOT Have Youth Program At Location – 1.64
Has Youth Program At Location – 2.05



Organizational Inclusion Efforts

Participating organizations were asked a series of questions regarding their internal efforts to develop and encourage a welcoming atmosphere within their organizations for LGBT employees and community members. This included both internal practices to develop a culturally competent work force, such as recruitment and training, and outreach efforts to the wider LGBT community through a variety of avenues, such as recruitment of board members, creation of diversity task forces or committees, partnership with local or national LGBT organizations and the use of inclusive LGBT language and images.

Recruitment of Employees

Organizations were asked whether they had targeted any specific employee recruitment efforts toward the LGBT community in the past three years. Some examples of these actions include specifically stating that the organization does not discriminate on the basis of “sexual orientation” and “gender identity” in job announcements; advertising through local or national LGBT or LGBT Jewish organizations, newspapers or websites; or recruiting at LGBT or LGBT Jewish conferences. Organizations were not asked whether these efforts were successful or how many LGBT employees they may have recruited, but rather they were asked to demonstrate that they had cast the widest possible net when trying to attract new talent.

A large majority of organizations – 79% –

indicated they had not specifically targeted the LGBT community in employee recruitment efforts during the past three years. In follow-up conversations with survey respondents, many organizations said they had not done any hiring in the past few years or, if they had, they had not done active recruitment of any sort. Of the organizations that had done active recruitment in the past three years, most utilized alumni networks or posted positions on www.jewishjobs.com.

Twenty-one percent of organizations had, in one way or another, made specific efforts to recruit LGBT employees in the past three years. Many organizations responded that they had put non-discrimination or other inclusive language in job postings. Other organizations had worked with LGBT members or internal LGBT groups to spread the word or sent hiring notices to local LGBT and LGBT Jewish organizations.

Regardless of their individual answers, many organizations noted that they had open LGBT individuals in their work force. However, several of the survey respondents employ a small number of people and rarely have job openings. When they do, they often rely on word of mouth or other communication avenues specific to the Jewish community to fill those vacancies. As a result, outreach to potential LGBT candidates through targeted efforts remains a largely untapped resource available to organizations interested in improving the diversity of their work force.

Regardless of their individual answers, many organizations noted that they had open LGBT individuals in their work force.

Fifty-nine percent, or 120 of the 204 survey respondents, responded that their location had not completed any diversity or inclusion training of any kind in the past three years.

Training

While not always common at non-profit institutions, workplace trainings are a powerful way to prepare staff on a variety of issues, including diversity and inclusion. Organizations were asked whether they have offered diversity and inclusion training to their staff in the last three years; organizations that responded affirmatively were asked whether these trainings include a discussion of LGBT diversity and inclusion.

Fifty-nine percent, or 120 of the 204 survey respondents, responded that their location had not completed any diversity or inclusion training of any kind in the past three years. Of the 84 organizations – 41% of total respondents – that indicated that they had conducted some level of diversity training at their location, an overwhelming majority was inclusive of LGBT diversity. Eighty-eight percent of organizations said their training in the last three years specifically discussed LGBT diversity.

In follow-up interviews, some organizations reported inclusive training on an annual basis, while at other organizations training arose following a specific incident. Some organizations discussed working with outside LGBT or LGBT Jewish organizations to provide training while others used individual staff members or community members.

Among the organizations that conducted diversity and inclusion training but did not

include an LGBT component, some stated that they had only been able to find someone capable of doing wider diversity training without specific discussions. Other organizations explained that they did not need to do a diversity or inclusion training specific to the LGBT community, as they were already welcoming of this community.

Recruitment of Board Members

As the HRC Foundation developed the JOEI survey with input from its advisory board and community members, the power of lay leadership in determining an organization's stance on LGBT inclusion was a consistent theme. The presence of LGBT individuals on an organization's lay leadership board was described in many cases as one of the most important catalysts to greater awareness, understanding and inclusion within the organization. LGBT members or their allies were empowered to help the organization to become more inclusive and to connect with the wider local LGBT community. The JOEI survey asked whether organizations had specifically recruited an LGBT individual to their lay leadership board in the last three years.

Seventy-five percent of organizations answered that they had not specifically recruited LGBT individuals to their lay leadership board in the past three years. In the follow-up interviews, many organizations replied that they did not





The presence of LGBT individuals on an organization's lay leadership board is one of the most important catalysts to greater awareness, understanding and inclusion within the organization.

recruit for their board based on any personal characteristic, such as race, gender, sexual orientation or gender identity. Other reasons given for not recruiting an LGBT board member included lack of LGBT people (as well as Jewish LGBT people) in their membership, a sense of unease that such an invitation would be viewed as insulting and isolating, or the organization already had an open LGBT board member serving on its board.

On the other hand, 25% of organizations answered that they had been deliberate in recruiting an LGBT individual to their lay leadership board in the past three years. Some organizations told successful stories of inviting active LGBT community members to join the board and these individuals taking a leadership role in reviewing the organization's communications and programs for cultural competency and providing a connection to the wider LGBT community. A handful of organizations stated that they had unsuccessfully invited LGBT individuals who had rejected the offer to join the board because of a fear of tokenism or isolation.

The approach to diversifying board membership is unique to each individual organization, and legitimate concerns arise about whether and how to recruit LGBT board members. Organizations that have successfully navigated the issue of

increasing awareness, understanding and inclusion are likely benefiting from a board whose diversity includes sexual orientation and gender identity.

Task Forces or Committees on Diversity and Inclusion

With a renewed interest in organizational diversity, many non-profits are choosing to form task forces or committees to focus on diversity. These groups can be focused on increasing an organization's overall diversity or on one particular area of diversity or function within the organization.

Of the 36 survey respondents that formed some type of task force or committee on diversity and inclusion in the past three years, all but three answered that these task forces or committees included discussions of LGBT diversity and inclusion. Many of these respondents noted that the task force or committee was part of a broader diversity effort and not exclusively focused on LGBT diversity. Those organizations that did not discuss LGBT issues in the committee said they had focused their diversity and inclusion efforts on another specific subgroup (i.e., interfaith diversity, racial diversity, etc.) or that they did not discuss the issue because LGBT diversity was not an issue for their organization.



A majority, 55%, said they had reached out to local or national LGBT organizations in the past three years.

Reaching Out to LGBT Organizations

In the absence of an internal working group or active lay leadership, one of the easiest ways organizations can discover methods to increase their LGBT inclusivity is by contacting local or national LGBT or LGBT Jewish organizations. These organizations often provide opportunities for training, expertise in evaluating materials and a partner for programs. Organizations were asked where they had reached out to local or national LGBT organizations for advice, training or other assistance with delivery of services or outreach to the LGBT community in the past three years.

A majority, 55 percent, said they had reached out to local or national LGBT organizations in the past three years. Many respondents had originally established relationships with LGBT organizations to increase LGBT membership or to host LGBT programs, but these original outreach efforts sometimes resulted in continued partnership in terms of training or other assistance. Resources for improving outreach are included in this report beginning on page 66.

Forty-five percent of organizations answered that they had not reached out to local or national LGBT or LGBT Jewish organizations in the past three years. Some survey contributors noted that this was because of the fact that they were not aware of LGBT organizations in their area. Others responded that there was not a need to reach out for

training or any other assistance, as this could be done in-house.

Membership

Many social-based non-profits that have an official membership often provide price breaks or other benefits for couples or families that join together. Nevertheless, the term “family” or even “couple” can be defined in a variety of ways. Organizations that use inclusive language and allow same-sex couples and families to receive these benefits are sending a strong message to LGBT individuals that their relationships are valued as equal to different-sex relationships.

Of the membership-based organizations in the survey, 98% would or have offered family memberships to same-sex couples and families. One organization that did not offer this membership stated that they had brought up this issue with their lay leadership board, but that they felt it was better to address the issue when it arose and, as they did not have any LGBT families, would not be making a decision at this time.

Of the headquarters and central office organizations that answered that they did provide sample membership materials to their local affiliates, 78% answered that they did include LGBT-inclusive examples. One such example is the Union of Reform Judaism, which offers its congregations examples of fully inclusive membership materials.





Communications: Language, Images and Other Forms of Communication

Language, images and other forms of communication are a key way that an organization can advertise the welcoming nature of its institution and a method by which many new LGBT community members will gauge which institutions they believe (or do not believe) will welcome them. As a result, organizations were asked a series of questions regarding their use of inclusive communication.

Language

Organizations were asked to evaluate their publicity materials – including pamphlets, websites and any other outward-facing communication platforms. They were asked whether or not they included any of the following language:

- Significant Other
- Partner (when referring to individuals in a relationship)
- Sexual Orientation
- Gender Identity and/or Expression
- Gay and Lesbian
- Lesbian, Gay, Bisexual and Transgender or Gay, Lesbian, Bisexual or Transgender (LGBT/GLBT)
- Same-Sex and/or Same-Gender
- Parent 1/Parent 2 or Guardian 1/Guardian 2 instead of Mother/Father

90% of organizations answered that they included one or more inclusive terms in their publicity materials.

Images

Utilizing images inclusive of the LGBT community in publicity materials – through symbols (safe zone stickers/rainbow flags) and people (couples/families) – makes a strong statement about an organization's overall atmosphere. After answering affirmatively that an organization used images of families, couples, individuals or gatherings in any publicity materials, organizations were asked whether any of these images included images of LGBT families, couples, individuals, gatherings or symbols.

Sixty percent of organizations answered that

they did include inclusive imagery in their publicity materials. These images often included pictures of LGBT couples or families who were members or clients of organizations. Other organizations chose to use inclusive imagery, particularly Keshet's GLBT Safe Zone online sticker.

Forty percent of organizations answered that while they used imagery in their publication materials, they did not include any types of LGBT imagery. The reasons for can be summarized in three categories:

- A result of the types of photos they included (i.e., all unidentifiable adults and/or children).
- Organizations that only include images of their members/clients and did not have any LGBT members or clients were unable to include this imagery.
- Based on the conservative nature of their community, such imagery would not be well received.

Newsletters

One common way that non-profits communicate with their membership base is through newsletters. These newsletters can be broad-based updates about the organization and, as they often do at smaller or more social-based organizations, may include updates regarding members' and clients' lifecycle events, such as a marriage.

Of the organizations that answered that they did have an organizational newsletter, 56% replied that they had included some type of LGBT content in the last three years. This content sometimes featured coverage of an LGBT event at or outside of the organization or other current events related to the LGBT community.

Of the organizations that included lifecycle announcements for different-sex couples and families in their newsletter, 100% of organizations answered that they would or have included lifecycle announcements for same-sex couples. ★







Community and Client Engagement

The majority of the participating organizations in the 2012 JOEI provide services or programs to their wider communities and interact with the community in one capacity or another. These programs and services cover before- and after-school care programs for children, adult education classes, conferences, psychological services, social events and other services. These programs are the first – and sometimes only – interaction that LGBT Jews have with an organization, and they send a message to the community and staff alike about an organization's priorities.

The 2012 JOEI survey distinguished between umbrella organizations and local programs and services that support local service providers. It asked questions about LGBT-specific programming, how LGBT participants from the community are attracted and whether an organization provides affiliates with resources to expand programming.

Umbrella Organizations

In addition to providing their local networks with help in fundraising, organizing and guidance on workplace practices, headquarters and central offices of large networks sometimes provide ideas and resources for programming.

Of the organizations that responded affirmatively that they provided program resources or guidance, 66% responded that they specifically addressed LGBT inclusion, which included providing local affiliates with

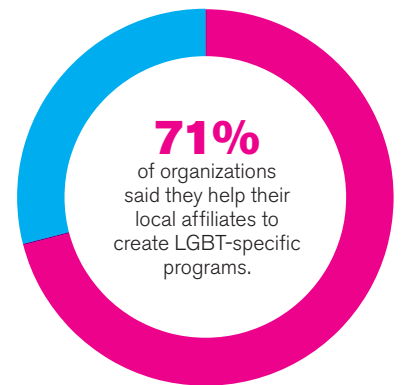
examples of statements or logos that signify an organization's commitment to LGBT inclusion and providing samples of inclusive membership materials. Of the 34% percent of organizations that answered that they did not provide their local organizations with ideas for how to make their general programming more inclusive, most responded that this was a result of their organization's mission being unrelated to LGBT issues.

LGBT-Specific Programming

Seventy-one percent of organizations said they help their local affiliates to create LGBT-specific programs. This assistance included access to a database of LGBT-specific programs that affiliated organizations could use or adapt for their own institutions. For example, "The Hillel LGBTQ Resource Guide" created in 2007 by Hillel: The Foundation for Jewish Campus Life gives an overview of LGBT-specific program ideas, as well as a contact list of LGBT-identifying Hillel staff members and groups from around the country who can serve as a resource.

Advocacy

Keeping with the Jewish tradition of social justice and the ideals of tikkun olam (repairing the world), some Jewish organizations have taken an active role in promoting equal rights for LGBT people under the law. This action can vary from a small synagogue signing onto a petition to a national Jewish organization lobbying Congress on specific legislation. Jewish organizations from houses of worship



*"The Jewish Federation welcomes the participation of interfaith couples and families, and people of all abilities, backgrounds and **sexual orientations**."*

– Jewish Federation of Greater Washington (Washington, D.C.)

*"Our diverse community welcomes Jews of all backgrounds including interfaith families, singles, seniors, couples, single-parent and **same sex families** and Jews-by-Choice. Within our warm and inviting surroundings, The Community Synagogue encourages meaningful participation and creates a special sense of belonging."*

– The Community Synagogue (Port Washington, N.Y.)

*"Mayyim Hayyim strives to be inclusive of all who wish to learn and/or immerse, regardless of **sexual orientation**, physical/developmental ability, or background."*

– Mayyim Hayyim: Living Waters Community Mikveh and Paula Brody & Family Education Center (Newton, Mass.)

to national policy organizations advocate for equality on a host of LGBT issues including, but not limited to, same-sex relationship recognition, anti-bullying, healthcare equality, workplace non-discrimination, hate crime legislation, LGBT issues abroad, HIV/AIDs awareness and prevention, and military service equality.

Many national policy organizations have taken an active role in advocating for specific legislation. For example, participating organizations such as the Jewish Council for Public Affairs, the Anti-Defamation League, the National Council of Jewish Women and The Union for Reform Judaism were involved in advocating for the repeal of the discriminatory "Don't Ask Don't Tell" policy. Other organizations, such as the American Jewish World Service, have been extremely active in working for LGBT equality overseas, such as creating a petition for the Jewish community to stand together against the anti-homosexuality Ugandan bill. Some respondents said they had joined the 11,345 organizations and individuals that signed Keshet's "Do Not Stand Idly By: A Jewish Community Pledge to Save Lives" anti-bullying pledge.

Local Services and Programs

More often than not, organizations believe that their general programs, those intended for an unspecific audience, are welcoming of all participants, including LGBT participants. When asked, 50% of affiliate organizations

said that all of their general programs were welcoming, 21% said some of their general programs were welcoming and 29% said that none of their general programs were explicitly welcoming of the LGBT community.

Many organizations have placed welcoming statements on their website, either on their front page, in their "About Us" page, or under a values or mission statement. **Some examples are presented above.**

While the examples to the left do not include gender identity and/or expression, they are a great start to encouraging the wider LGBT community to attend their organization's programs. Nevertheless, to be fully inclusive to the transgender community, we encourage organizations to include the term "gender identity and/or expression."

These organizations and many others said they go further to attract the LGBT community to their institutions through active recruitment and advertising.

Sixty-six percent of primary service providers said they actively reach out to the LGBT community to attract members or clients to their programs. Common actions included placing themselves on welcoming religious institution directories run by local or national LGBT groups, providing membership information to local LGBT groups, advertising the organization in local LGBT newspapers or websites and including a welcoming statement on general



Findings

Community and Client Engagement

advertisements that specifically discussed that LGBT families, couples or individuals were welcome.

Of the 34% that had not reached out to the LGBT community, some organizations explained that they did not advertise at all or that they did not know of ways to reach out to the local LGBT community. Others simply stated that they did not feel a need to advertise to any specific subgroup.

In an effort to make general programs more welcoming, organizations are encouraged to use specific language, either on their website, in ads, in programs or in program descriptions to welcome LGBT individuals, couples and families in Jewish communal life.

LGBT-Specific Programming

LGBT-specific programming, for the sake of this survey, was classified into two categories. The first type of LGBT-specific programming was programming intended for an LGBT audience. Often allies and other members of the community are welcome to attend but these programs are frequently built around the idea of providing focused programming on specific LGBT topics.

An example of this would be the multifaceted Washington, D.C., JCC's GLOE – the Kurlander Program for GLBT Outreach and Engagement which provides regular programming such as the annual Rainbow Shabbat and holds breakout gatherings for their "Nice Jewish Boys" and "Nice Jewish Girls" groups.

On the other hand, other organizations, for a variety of reasons including a small LGBT population or an initial foray into creating an LGBT group, do not have the funds for an independent LGBT group but will include LGBT content and programs within their general programming.

Forty-nine percent of primary service providers answered that they provide some

type of LGBT-specific programming. Many organizations mentioned incorporating LGBT content into their general programs, such as including same-sex partner scenarios in healthy-relationship programs or inviting a speaker from a local LGBT group for an organization's weekly speaker series. For example, an organization that shows a weekly movie will include a viewing of an LGBT or LGBT Jewish movie (i.e., "Yossi and Jagger") and follow it with a discussion of LGBT issues in Israel.

A handful of synagogues, JCCs, Hillels and other organizations mentioned forming their own LGBT groups or providing very specific LGBT programming. Many said that these programs came as a result of community members asking for them and were more focused on lesbian and gay matters rather than issues important to bisexual and transgender audiences. For a comprehensive list of program ideas collected through answers given in the survey and during reviews, see Appendix 3.

Fifty-one percent of organizations said they had not offered any LGBT-specific programs or services. A handful of organizations responded that they had reached out to their LGBT community members for parlor meetings, or created a written needs assessment, and the response they received was that that type of programming or services was not needed. On the other hand, a number of organizations that JOEI staff spoke to had hosted similar parlor events or town hall discussions resulting in a high demand for LGBT programming. Some organizations stated that they were worried about isolating LGBT individuals and wanted them to be incorporated with the other members.

In contrast, another response received was that such programming was not needed, as there was a very small, or no, LGBT community at that organization. ★







Workplace Policies and Practices

There is no federal law that prohibits discrimination on the basis of sexual orientation or gender identity. To date, only 16 states prohibit discrimination on the basis of gender identity and 21 states on the basis of sexual orientation. The picture is even bleaker when it comes to equality in relationship recognition. Only six states and the District of Columbia allow citizens to be married to a same-sex loved one. A total of 14 more provide some level of relationship recognition – such as civil unions or domestic partnerships. These laws provide some level of security for families by allowing them to register with the state. Still, federal law flatly denies to same-sex couples all of the more than 1,100 rights and responsibilities that flow from marriage in all 50 states.

Private-sector employers, including religious organizations, are in a unique position to fill in where state and federal law provides only patchwork, if any, protections for LGBT people in the workplace. These employers are free to set policies that protect LGBT employees from discrimination and to provide benefits to employees in same-sex relationships, regardless of state law.

Non-Discrimination Policies

Of the 204 organizations that responded to the JOEI survey, 148, or 73%, had a non-discrimination policy and 56 organizations, or 27%, did not. Often smaller organizations, like those included in this survey, do not have or spend the resources to develop comprehensive HR policies like those of larger organizations.

This absence of policies may be in part because they lack the larger budgets to hire HR specialists or attorneys to create employee manuals. Also, many do not feel the need, as managers in smaller organizations have the benefit of being in direct contact with all of their employees and get to set the tone for the organization as it treats its employees in daily interactions. Still, it is preferable to have a written policy that is available publicly for prospective employees and to guard against changes in management style in the event of turnover.

Among the organizations that have a non-discrimination policy for their locations, 89% include the term “sexual orientation” and 48% include the term “gender identity” or “gender identity and expression.” Including these two terms sends a strong message to LGBT employees and their allies that they can bring their full selves to work and not fear discrimination, regardless of how state or federal law treats them. Approximately 15 organizations amended their existing non-discrimination policies over the course of the JOEI survey and follow-up interviews to include these terms.

Borrowing from the extensive research on workplace benefits in the HRC Corporate Equality Index, the JOEI survey asked each organization whether they offered 12 separate benefits and whether the benefits were allowed equally for employees with same-sex spouses and partners as they are for those with opposite-sex spouses or partners.

Private-sector employers, including religious organizations, are in a unique position to fill in where state and federal law provides only patchwork, if any, protections for LGBT people in the workplace. These employers are free to set policies that protect LGBT employees from discrimination and to provide benefits to employees in same-sex relationships, regardless of state law.



Employee Benefits

Table 1. Benefits, by type offered and who is covered

	Percentage of Organizations Offering Benefit to Employee and Family	Percentage of those with Benefit	
		Benefit Allowed for Same- and Opposite-sex Spouses/Partners	Benefit Allowed for Opposite-sex Spouses Only
Shiva (bereavement) Leave	91	99	1
Health Insurance	89	94	6
Partner's Dependent(s) Health Insurance	84	94	6
Dental Insurance	75	90	10
COBRA	75	92	8
FMLA-Like Leave	71	96	4
Life Insurance	38	85	15
401(k) Hardship Distribution	31	91	9
Relocation Assistance	24	91	9
QJSA	19	86	14
QPSA	17	90	10
Adoption Assistance	12	81	19

A total of 180 organizations out of 204 respondents – or 88% – offered at least some benefits to their employees and in many cases to their spouse or partners.

Table 1. shows the percentage of organizations that offered each benefit to the employee and a same- or opposite-sex spouse or partner. For example, 89% of organizations provide health insurance coverage to their employees and employees' spouse or partner. Eleven percent either did not provide health insurance coverage at all, or if they did, extended it only to the employee and no other family members. Of those 89% of organizations that offer the benefit, a large majority, 94%, allow same-sex partners or spouses to enroll for health insurance coverage.

These organizations employed anywhere from 0 to 3,600 employees. After decades of domestic partner benefits being out of reach for smaller organizations and features of only Fortune 500 companies, the JOEI survey adds to the body of evidence that in some states, even the smallest employers

are able to gain this coverage. Among those that provided domestic partner benefits, more than half – 99 organizations – had fewer than 50 employees and 46 of those had fewer than 10 employees.

Shiva (bereavement) leave was the most widely provided benefit with 91% of organizations providing it and 99% saying they allow leave in the event of the death of same-sex partner. Only one organization indicated they allowed shiva leave in the event of the death of an opposite-sex partner only.

Across most of the benefits offered, a majority of organizations that are part of the JOEI provide them equally to employees with same-sex partners or spouses. Except for three areas – adoption assistance, life insurance and the qualified joint and survivor annuity (QJSA), a specific feature of defined benefit- plans – 90% or more of organizations extended benefits to employees and their same-sex partners or spouses. This includes two benefits that are mandated by the federal government



A total of 180 organizations out of 204 respondents – or 88% – offered at least some benefits to their employees and, in many cases, to their spouses or partners.

for all but the smallest employers – COBRA and FMLA. While federal law does not specifically require the inclusion of same-sex partners and their families in these benefits, private employers are free to add them. Ninety-two and 96% of JOEI respondents, respectively, extend these benefits beyond what is required by law.

Benefits that are not commonly offered by organizations in the JOEI are supplemental life insurance, relocation assistance, adoption assistance and retirement plan options. This mirrors trends in the rest of the American workplace. Both the QJSA and the qualified pre-retirement survivor annuity (QPSA), qualified pre-retirement survivor annuity, are features of a traditional pension (defined benefit) plan which have become increasingly unpopular with employers for several decades. These data show that Jewish organizations are no exception to this trend.

Workplace Policies and Benefits for Transgender Employees

Transgender people access healthcare for all the same reasons anyone else does, for medically necessary treatment. In this case, this includes medical treatment to alleviate the dissonance between their innate sense of gender and the gender they were assigned at birth. Many of the medical interventions, from hormone replacement therapy to reconstructive surgical procedures, are covered for a variety of other medical diagnoses. But, sometimes a person's transgender status is regarded by insurance carriers (and some care providers) as a barrier to care.

Due to the way that most health insurance contracts are written, transgender people can be denied health insurance coverage, often irrespective of whether those needs are related to transitioning (such as reconstruction and alignment of sex characteristics from male to female, or from female to male, through the use of hormones and/or surgical interventions). Transgender people may even be denied medical treatment as fundamental as mental-health counseling, which can lead to stress, depression, suicide attempts, poor work performance and over-utilization of unrelated services and benefits that do not address the root causes of a person's health status.

The vast majority of commercial health insurance plans in the United States exclude all or most coverage for treatment related to gender transition. This "transgender exclusion" denies coverage for claims for medically necessary treatments such as psychological counseling for initial diagnosis and ongoing transition assistance, hormone replacement therapy, doctor's office visits to monitor hormone replacement therapy and surgeries related to sex reassignment. Exclusions are generally found in a benefits plan summary document, which is available to all employees and applicants.

Transgender coverage has begun to change, albeit slowly. In 2008, the American Medical Association endorsed health insurance coverage for medically necessary treatment for transgender people. The World Professional Association for Transgender Health has adopted a set of international Standards of Care that are the basis of how insurance companies should decide coverage for transgender people.

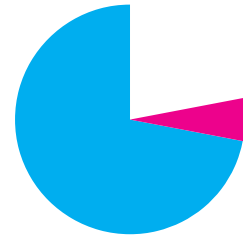
An example of a fully inclusive non-discrimination policy:

Rabbis for Human Rights Non-Discrimination Policy

Rabbis for Human Rights-North American is an equal opportunity employer. RHR-NA does not discriminate or permit discrimination against, or provide special treatment for, any person or group of persons on the grounds of race, color, religion, sex, age, ethnicity, gender identity or expression, national origin, sexual orientation, marital status, familial status, physical disability, or any other category protected by law, particularly those related to EEO (Equal Employment Opportunity) except in the case of a bona fide occupational qualification.



Six percent of respondents indicated that they have changed an employee's personnel files to match their preferred gender and name, while 72% said that had not been approached about it, but would do so if asked.



More recently, employers have begun to ask their insurance companies to remove the “transgender exclusion” from the policies for their employees. While the removal of these exclusions does not guarantee adequate care, it is an essential first step to providing transgender employees with coverage they need. Employers that seek to expand their insurance policy to cover treatment for transgender individuals often face a number of hurdles. A lack of experience and competency within the insurance industry, combined with limited actuarial data for such a small population, lead some insurers to decline to add the coverage. However, an increasing number of insurers are overcoming these hurdles by creating national-level subject matter experts that can provide direction on administration of local contracts. More insurers are also recognizing that because the transgender community is small in number, there is no appreciable increase in cost when covering this population.

The JOEI survey asked about the existence of “transgender exclusion” as well as a number of other practices aimed at providing a level playing field for transgender employees in the workplace. The purpose was to educate participants about this remaining form of discrimination and create a dialogue about how best to eliminate it.

JOEI participants were asked if they had removed the “transgender exclusion” in their health insurance contracts. Eleven organizations – or 5% of survey respondents – had worked to address this issue. Four organizations said that their insurance exclusion had been removed and seven

others had asked it to be, but their providers declined to make the change.

In other areas of transgender inclusion in the workplace, the JOEI survey revealed a lack of experience on the part of employers, but also a strong willingness to accommodate valued employees who transition at work. One area of concern to employers and their transgender employees are the gender markers on personnel files. Six percent of respondents indicated that they have changed an employee's personnel files to match their preferred gender and name, while 72% said that had not been approached about it, but would do so if asked. Eleven percent of organizations said that they had allowed new hires to designate their preferred gender in personnel records irrespective of how their legal gender was listed on government documents. Sixty-five percent said that had not been approached but would do so if asked.

Another area where employers have a role in the life of a transgender person is in how they are allowed to dress on the job and which restroom they are allowed to use. Twenty percent said they have allowed transgender employees to dress in a manner consistent with their full-time gender presentation and 66% said they had not been approached but would do so if asked. Nineteen percent said they have allowed employees to use the restroom consistent with their full-time gender presentation, while 58% had not been approached but would do so if asked. Some of the organizations that answered “not applicable” to the question about restroom usage explained that restroom facilities at their location were all unisex. ★



Sub-Groups within the Survey

While the survey was created to be accessible to all types of Jewish organizations, JOEI staff felt that organizations that provide some programs or services – particularly synagogues, youth-oriented programs and eldercare facilities – needed a specific set of questions because of their unique nature. An overview of the results of these two breakout sections of the JOEI survey follows.

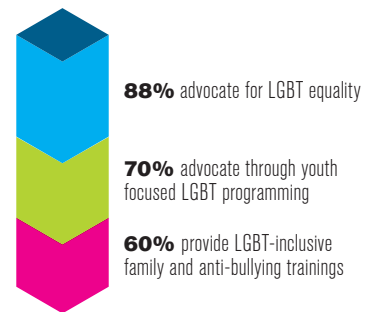
Synagogues

Overall Findings

Forty-three synagogues from across the country participated in the JOEI survey. These included congregations that identify as Renewal, Reconstructionist, Reform and Conservative, as well as Non-Denominational.

Increasing numbers of synagogues are making outreach and engagement with the LGBT community a priority. Ninety-five percent of participating synagogues responded that they used inclusive language and 61% use inclusive images in their external communications. While 37% of synagogues responded that they provide LGBT-specific programming, 60% responded that their all of their general programs are explicitly welcoming of the LGBT community and 12% responded that some of their general programs are explicitly welcoming.

This focus on engagement with the LGBT community was demonstrated by the synagogues' high level of advocacy efforts for LGBT equality; 88% of synagogues involved in advocacy responded that they had worked on LGBT issues, 70% focused on LGBT youth programming and 60% of synagogues responded that they provide LGBT inclusive family and bullying trainings.



Nonetheless, it appears that there is still work to be done when it comes to creating fully inclusive written policies. Only 37% of participating synagogues reported having a non-discrimination policy (of those with a non-discrimination policy, 88% responded that they include the term “sexual orientation” and 44% reported including the term “gender identity and/or expression”). Further, of the 31 synagogues answering that they provide some type of youth programming, only 19% answered that they have a written anti-bullying policy. Of the 19%, or six synagogues, only two of the policies were enumerated and included LGBT language.

The results show that synagogues placed low priority on internal LGBT engagement. Only 19% of synagogues reported having any type of diversity and inclusion training (though 88% of these organizations responded that this training included a discussion of LGBT diversity and inclusion) and 26% reported forming task forces or committees to investigate organizational diversity (with 91% of these organizations



For LGBT youth, these youth programs can prove highly challenging, creating a hostile environment in a place that is meant to be a safe space.

responding that the task force or committee considered LGBT diversity).

Ritualistic Questions

While the process of becoming fully inclusive of the LGBT community is rooted in employee and community-based policies and practices for all organizations, houses of worship face a unique set of challenges when it comes to becoming inclusive due to their ritualistic needs. Whereas the HRC Foundation, the JOEI staff and Advisory Board, and the key funders of the JOEI felt it was important to invite congregations to take the survey and applaud the synagogues that did participate, ritualistic questions pertaining to a congregation's religious practices practices (i.e. performing same sex commitment ceremonies or weddings) were not within the scope of the project and were not included in the survey.

Welcoming Synagogue Resources

The process to becoming a fully inclusive house of worship is a long process and cannot be completed by taking one survey. There are many organizations that are able to provide facilitation and resources to foster a truly welcoming atmosphere at a congregation.

Two particular organizations – Keshet and Hebrew Union College's Institute for Judaism and Sexual Orientation – help congregations around the country every day undergo the process of becoming welcoming institutions. To learn more about these organizations, as well as other LGBT Jewish Organizations, see Appendix 4.

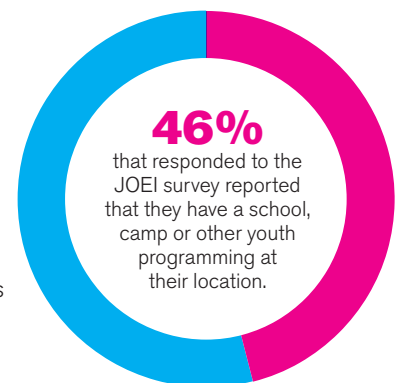
Youth Programs and LGBT Inclusion

Many members of the Jewish community begin to forge bonds with their Jewish identity at a young age through Jewish camps, youth movements, after-school programs and more. Nevertheless, youth from LGBT families or who identify as LGBT can have trouble fitting in, and face the same bullying in Jewish youth programs as anywhere else. For LGBT youth, these youth programs can prove highly challenging, creating a hostile environment in a place that is meant to be a safe space.

A total of 94 organizations – or 46% – that responded to the JOEI survey reported that they have a school, camp or other youth programming at their location. This group included 31 synagogues, 23 Jewish community centers, 21 camps, seven Jewish Federations, six Jewish schools, two denomination headquarters, two youth movements, one social justice organization and one social service organization. These respondents were asked a series of questions about anti-bullying policies, staff and youth training and gender-specific housing.

Anti-Bullying Policies ►

Written anti-bullying policies communicate an organization's commitment to creating a safe space for parents, staff and youth. As GLSEN, the Gay, Lesbian and Straight Education Network, explains, "Anti-bullying policies that enumerate categories [...] are (continued on p. 32)



Example of an enumerated, LGBT-inclusive anti-bullying policy from Congregation Shir Hadash in Los Gatos, Calif.

Congregation Shir Hadash Religious School Bullying Policy

Nine Jewish Values: Guidelines for Inclusive Jewish Community

Developed by Keshet and endorsed by the Shir Hadash Board of Directors

כבוד Kavod: RESPECT - Judaism teaches us to treat ourselves and others with respect; even the stranger is to be treated with respect. Kavod is a feeling of regard for the rights, dignity, feelings, wishes, and abilities of others. Teasing and name-calling disrespect and hurt everyone, so learn to respect people's differences.

שלום בית Shalom Bayit: PEACE IN THE HOME - Our community centers, synagogues, youth groups, and camps are often our second homes. Everyone needs to feel comfortable, safe, welcome, and respected at home. Don't ostracize those who seem different. Strive to settle disagreements in peaceful and respectful ways that allow all community members to maintain their dignity.

בצלם אלהים B'tzelem Elohim: IN GOD'S IMAGE - The Torah tells us that we are all created "b'tzelem Elohim" (Bereshit 1:26), in the image of God. This is a simple and profound idea that should guide our interactions with all people. We do not know the "image of God" except as it is reflected in the different types of people we encounter in the world. If we can remember that each of us, no matter how different, is created in God's image, this idea can lead us to find the connection we have with one another and help create truly inclusive communities.

כל ישראל ערבים זה בזה Kol Yisrael Arevim Zeh Bazeh: COMMUNAL RESPONSIBILITY - The Jewish principle that "All Israel is responsible for one another" (Shavuot 39a) means that it is our responsibility to stand up for each other, especially for those who are vulnerable and cannot speak up for themselves.

שמירת הלשון Shmirat Halashon: GUARDING ONE'S USE OF LANGUAGE - The Talmud warns us that we must take care in how we use language. Talking about others behind their backs, even if what we are saying is true, is prohibited. The guidelines for "shmirat halashon" remind us that what we say about others affects them in ways we can never predict. Words can hurt or heal depending on how we use them.

ואהבת לרעך כמוך V'ahavtah L'Reiecha Kamocha: LOVE YOUR NEIGHBOR AS YOURSELF - Commenting on Leviticus 19:18, Rabbi Hillel once stated that this was the foundational value of the Torah. It begins with loving ourselves. We must love and accept our whole selves, and in doing so create the capacity for extending that love and acceptance to others.

אל תפרוש מן הציבור Al Tifrosh Min Hatsibur: SOLIDARITY - "Don't separate yourself from the community" (Pirke Avot 2:5). When you feel different from others in your community, don't isolate yourself. Find allies and supporters who you can talk to. If you know someone who is feeling isolated, reach out; be an ally and a friend.

לא תעמד על דם רעך Lo Ta'amod Al Dam Reiecha: DON'T STAND IDLY BY - "Don't stand on the blood of your neighbor" (Lev. 19:16). Jewish tradition does not believe in the role of an "innocent" bystander. When someone is being hurt, the whole community has a responsibility to take action.

תוכחה Tochacha: REBUKE - "You must surely rebuke your friend" (Lev. 19:17). When we see our friends doing things that are wrong, we have a Jewish obligation to caringly remind them to do the right thing.

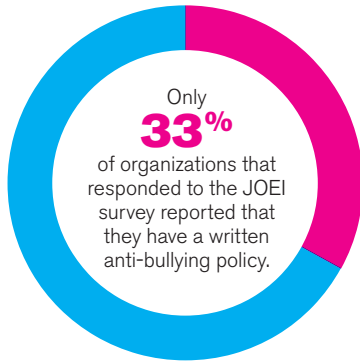
Definitions: In order to foster a safe and caring community where Jewish learning and engagement takes place, Congregation Shir Hadash does not tolerate bullying or harassment of any kind by any person, including students, teachers, parents, or other members of the community.

Bullying based on race; religion; color; national origin; disability; age; physical appearance; learning or behavioral difference; family structure; financial status; sex; real or perceived sexual orientation; real or perceived gender identity; or any other category is prohibited...



Findings

Sub-Groups within the Survey



the most effective at addressing all types of bullying. When it comes to bias-based bullying in particular, we have to be willing to name the problem if we want to protect all of our children.”¹ Having policies that include sexual orientation and gender identity sends an important message to groups that have been historically marginalized within the Jewish and wider communities.

Of the 94 organizations that have youth programs, two-thirds (64 organizations) do not have a written anti-bullying policy, while only 33% do. The HRC Foundation required that organizations submit an electronic copy of their policy, which was then reviewed by staff to check for appropriate wording.

Of the 31 organizations that have written anti-bullying policies, only 11 policies were enumerated. Of those 11 enumerated bullying policies, 10 included the term “sexual orientation” and five included “gender identity.”

More than half of organizations responding that they did not have a fully inclusive, written anti-bullying policy or had an anti-bullying policy that was not enumerated wanted to learn more. In follow-up interviews, organizations acknowledged a lack of familiarity with enumerated anti-bullying policies. There was a clear need for further education. Some organizations stated that bullying was not a problem at their organization and there was not a need to have a specific anti-bullying policy. Others said they had a written anti-bullying policy, but upon further research, none had been put in writing.

Trainings

Perhaps more important to the day-to-day experience of LGBT youth than written policies is essential training and awareness exercises for both staff and the youth community. The JOEI survey asked about the availability of training for either of these audiences in three specific areas: diverse families, name-calling or bullying, and gender-stereotyping. Forty-six percent of these 94 organizations offer some type of

diverse family training, and two-thirds of them discuss LGBT families.

Family is an important concept for all children, and they come in all shapes and sizes. It is vital that staff and youth remember that the typical idea of a family unit, a mom and dad, is not the same for all youth. This training varied depending on the organization, but was particularly seen in camps during staff trainings as a reminder that kids come from all types of families, including LGBT families, and that no assumptions should be made. The organizations that did not discuss LGBT families often said they do not discuss any specific sub-group of families in these presentations but instead discuss diverse families broadly.

Seventy-two percent of the 94 organizations said they conducted anti-bullying training, with 60% of them including sexual orientation and/or gender identity in their discussions.

According to “Growing Up LGBT in America,” a survey of more than 10,000 LGBT-identified youth, 54% of LGBT youth said they have been verbally harassed and called names involving anti-gay slurs such as “gay” and “fag.”² With the higher rates of LGBT youth suicide becoming more widely known, a growing number of non-profits are devoting greater resources to addressing the problem. Both BBYO and the Union for Reform Judaism (the latter through their affiliated North American Federation of Temple Youth movement) have created a variety of inclusive resources and training models for staff engaged with youth, as well as for youth themselves. Of the 40% of organizations that did not include conversations about sexual orientation and/or gender identity in their bullying/name-calling trainings, some organizations said they dealt with specific bullying issues as they arose or that bullying on this issue did not occur at their organization.

Thirty-eight percent of the 94 organizations said they had discussed gender-stereotyping in their training program.

HRC Foundation's Welcoming Schools program offers tools on how to avoid gender stereotyping as well as embrace family diversity. As Welcoming Schools explains, "Young children receive many powerful messages about gender roles and gender identity. These gender roles pressure [children] to conform to behaviors that may limit their full developmental potential."³ Youth who do not conform to these gender stereotypes are often harassed and bullied; therefore, training on gender stereotypes is very important. Of the 38% – or 32 organizations – that discussed providing this training, many camps discussed a need to provide training to break common gender stereotypes among their campers.

Gender-Specific Housing

Housing for transitioning or transgender youth is something most youth-oriented organizations have not had to deal with or think about. However, according to the HRC youth report, survey, 21.7% of transgender youth describe themselves as either "pretty unhappy" or "very unhappy," whereas only 5.5% of straight youths describe themselves as similarly unhappy. While the greatest problems for straight youths are classes, grades, college and careers, 40.6% of transgender youth name lack of acceptance by family members or peers as the biggest problem in their lives.² Therefore, helping transgender youth by offering flexible housing (e.g. at camp) can be an effective method for creating a safe space where they can enjoy themselves and learn about Judaism, rather than a place where they find themselves, once again, uncomfortable.

Of the 50 organizations responding that they offer gender-specific housing, only 12% or 24% – said they would offer flexible housing options for transgender or transitioning youth. The majority of respondents said that they have not yet had to deal with this issue and were unsure of how they would handle the situation. Many of these respondents expressed concern over how to best balance the needs and safety of the transitioning or transgender camper versus the comfort

level of other campers. Again a majority of those answering "no" expressed an interest in learning more.

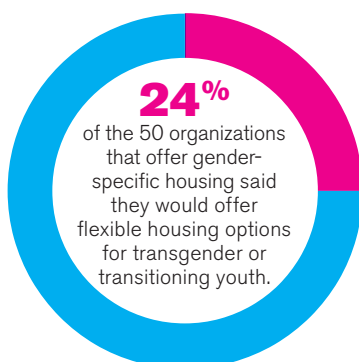
As the JOEI survey shows, it is important that, at minimum, organizations brainstorm about flexible housing options and develop peer resources within the LGBT and Jewish LGBT community. As Keshet's former Director of Education Andrea Jacobs explains:

"There is not a "one-size-fits-all" housing policy for transgender or gender non-conforming youth. It is vitally important to openly communicate with the youth about their needs and desires in order to create the best solution. Some transgender youth may feel more comfortable housing with the gender that correlates with their full-time presentation; others with their biological sex; some may want to room with a few select friends and some, if given the option, may prefer their own room. Again, it is important to work with the youth to create a reasonable accommodation that best suits an organization."

Eldercare Facilities

LGBT elders are often forced to go back into the closet when they reach their twilight years and reside at eldercare facilities due to fear of persecution and discrimination. Because of the unique needs of the LGBT eldercare community, the HRC Foundation invited a handful of Jewish eldercare facilities to participate in the JOEI survey and included a specific section of questions pulled from HRC's Healthcare Equality Index for them.

The only eldercare facility to complete the JOEI survey was Jewish Home Life Care, headquartered in New York City. While unable to provide statistically significant data, this employer of 3,600 has undertaken significant work to create LGBT-specific policies and programs for their LGBT residents, including an LGBT floor in their newest facility. ★

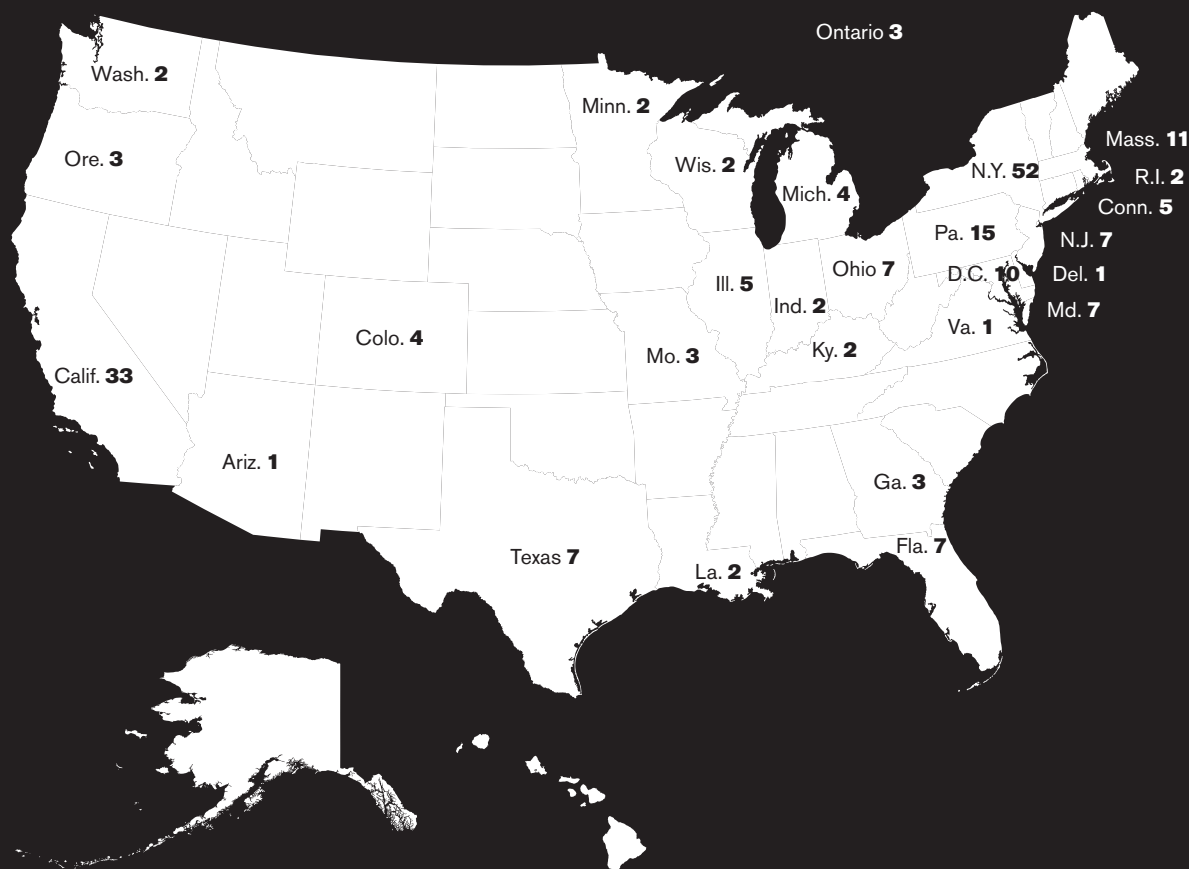


Survey Participants

A total of 204 organizations completed the Jewish Organization Equality Index representing organizations from 26 states, the District of Columbia and the Canadian provinces of Ontario and British Columbia. New York, California and Pennsylvania had the most respondents with 53, 33 and 15, respectively.

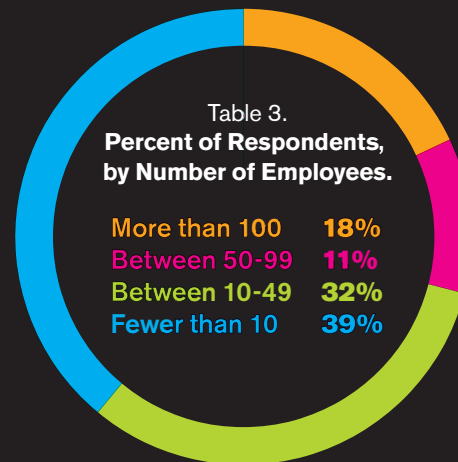
Table 2. **Number of Survey Responses, by State or Province.**

British Columbia **1**



The number of employees in these organizations ranged from zero* to 3,600. The total number of employees at all the organizations that responded to the survey is 15,771. As expected, a large majority of organizations, 71%, had fewer than 50 employees.

* The organizations that contained zero employees were exclusively volunteer-run. While many of the questions related to employee policies and practices were not applicable, organizations with zero employees were evaluated based on their communication and external community practices.



Of the responding organizations, 28, or 14%, indicated that they were the central office or headquarters of an organization with a number of affiliated or local groups under their umbrella. The remainder – 86 percent – indicated that they were an affiliate of an umbrella group or were themselves an independent group with no branches or affiliates.

Of the 86% of affiliates or independent organizations that responded to the survey, 78% indicated that they set the majority of the human resources policies. The remainder adopted the HR policies of their parent organization or a third party organization. These latter organizations were mostly university Hillels.

The organizations that responded to the JOEI survey were diverse in terms of core service type and denominational affiliation.

The organizations with the highest responses were religious organizations, Jewish Community Centers, Jewish Federations, and Hillels. Organizations with headquarters or central offices that participated had higher numbers of responses. JOEI staff received survey submissions from organizations spanning religious denominations, though survey submissions were not received from Orthodox institutions.

Table 4. **JOEI Survey Respondents, by core service type and denominational affiliation**



The primary goal of the Jewish Organization Equality Index is to create an opportunity for dialogue about the advantages, opportunities and challenges of welcoming LGBT employees and volunteers into our organizations. To further this goal as the HRC Foundation conducted this survey, it established collaborative partnerships with participating organizations and connected them to a wealth of existing best practice resources within the LGBT Jewish community.

As with any research into organizational development that involves new and challenging issues, the survey itself does not tell the whole story of an organization's journey on LGBT inclusion. We encourage readers to explore each organization featured in this report with an awareness of the limitations of this type of research and an openness to further information and dialogue.



How the JOEI Scores Were Calculated

The Jewish Organization Equality Index assesses whether there is parity for LGBT people in policy and practices that an organization has discretion to choose whether or not to undertake. For example, if an organization makes healthcare benefits available to its employees, JOEI assesses whether it has done so equally for LGBT employees. If an organization does not offer healthcare benefits, the question has no effect on the JOEI rating. Certain practices are common to all organizations, such as the use of language in communicating with constituents. In those cases, the JOEI rewards only inclusive practices, not neutral ones.

As such, the total number of points achievable fluctuates depending on the type of organization, whether they provide youth services, their benefits offerings and other policies and practices where the organization can, if willing, provide parity for LGBT families.

Table 5. JOEI Criteria

These indicators of inclusion are the basis for an organization's JOEI rating.

Organizational Inclusion Efforts

Has made an effort to recruit openly LGBT employees

Has made an effort to recruit openly LGBT lay leadership

Addresses LGBT inclusion in diversity training for staff, if applicable

Addresses LGBT inclusion in organizational diversity task force, if applicable

Has reached out to local or national LGBT groups for advice, training or other resources

Uses inclusive language in forms, publications and other media

Uses inclusive images in forms, publications and other media

Includes LGBT-specific content in newsletters, if applicable

Includes announcements of LGBT lifecycle events (such as weddings) in newsletters, if applicable

Offers membership privileges to same-sex couples and families equally, if applicable

Offers resources on recruiting LGBT members or clientele to affiliates, if applicable (for headquarters or central offices)

Offers sample LGBT-inclusive membership or clientele materials to affiliates, if applicable (for headquarters or central offices)



Table 5. JOEI Criteria

These indicators of inclusion are the basis for an organization's JOEI rating.

Community and Client Engagement

Explicitly welcomes LGBT participants to join programs or services

Actively seeks to attract LGBT participants to join programs or services

Offers LGBT-specific programming

Offers models for LGBT-inclusive general programming to affiliates, if applicable (for headquarters or central offices)

Offers models for LGBT-specific programming to affiliates, if applicable (for headquarters or central offices)

Has publicly supported LGBT equality at the local, state, national or international level, if applicable

Has an anti-bullying policy that includes sexual orientation and/or gender identity, if applicable (for youth-focused programs)

Has held a family diversity awareness workshop or training that includes LGBT families, if applicable (for youth-focused programs)

Has held an anti-bullying or name-calling workshop or training that specifically discusses LGBT bullying, if applicable (for youth-focused programs)

Has held a gender-stereotyping training workshop, if applicable (for youth-focused programs)

Provides flexible housing options for transgender youth, if applicable (for youth-focused programs)

Has a Patient's Bill of Rights that includes sexual orientation and/or gender identity, if applicable (for eldercare facilities)

Has a visitation policy that is inclusive of LGBT families, if applicable (for eldercare facilities)

Provides counseling on advance healthcare directives inclusive of LGBT families, if applicable (for eldercare facilities)

Does not require additional proof of relationship for same-sex spouses/partners in the event of incapacitated resident, if applicable (for eldercare facilities)

Allows same-sex couples to cohabitate in residential facility, if applicable (for eldercare facilities)

Workplace Policies

Has a non-discrimination policy that includes sexual orientation and/or gender identity, if applicable

Requires new hires to review non-discrimination policy, if applicable

Offers employment benefits equally to same-sex spouses/partners, if applicable, including:

- health and dental insurance
- domestic partner's dependent(s) coverage
- shiva (bereavement) leave
- life insurance
- relocation assistance
- adoption assistance
- inclusive retirement plan options (Qualified Joint and Survivor Annuity (QJSA), Qualified Pre-Retirement Survivor Annuity (QPSA) and defined contribution plans)
- COBRA coverage
- Family and Medical Leave Act (FMLA)-like leave

Has an insurance contract that does not include a blanket exclusion for transgender healthcare, or has requested one

Reflects employee's desired gender in personnel records

Allows new hires to designate their desired gender in personnel records, irrespective of their legal gender, if applicable

Allows employees to dress in accordance with their full-time gender presentation

Allows employees to use restroom facilities that correlate with their full-time gender presentation

Weighting

Each of the policies or practices that are part of the JOEI rating was assigned a weight based on its importance to LGBT inclusion. The JOEI score for each organization was calculated by adding the number of points achieved for an inclusive policy and dividing it by the total number of possible points an organization could achieve for having full parity in all of the work they do.

Percent of
JOEI score

30%

**Organizational
Inclusion
Efforts**

29%

**Community
and Client
Engagement**

41%

**Workplace
Policies and
Benefits**

Based on the numerical score, organizations were placed into one of four categories that provide a general description of where an organization is on the road to full inclusion.

Inclusion 75-100%

Organizational LGBT diversity and inclusion efforts are integrated into everyday functioning of the organization. Organizations demonstrate the benefits of a fully engaged LGBT community both internally and externally by developing innovative approaches in programming and supporting continuing education of both new and established staff and community members.

Adaptation 60-74%

Organizations are implementing new policies and practices aimed at fostering inclusion of the LGBT community within their groups. Organizations have achieved buy-in from key stakeholders and have undertaken concerted actions to institute broad-based changes in their organizational culture with regard to LGBT inclusion.

Exploration 45-59%

Organizations are examining available avenues to create cultural change within the organization, but have not yet started the efforts or have only just begun. This exploration may include researching other organizations' efforts to handle anticipated challenges and considering which programs they are willing to adapt to their own organizations as initial steps.

Contemplation 44% and below

Organizations have recognized that the LGBT community is a unique sub-set of the Jewish community whose full inclusion and acceptance may present unique opportunities and challenges. There is a realization that time and energy will need to be devoted to dialogue and education, but the organization has yet to identify a sustainable path forward.



Survey and Population Development

Survey Development

The purpose of the survey was to collect information on how organizations incorporate LGBT inclusion into their employee programs, their programming and community outreach, and also provide an educational opportunity for participants. A copy of the survey is available in Appendix 2.

The JOEI survey was developed using existing models that track LGBT inclusion both within and outside of the Jewish community. Previous studies within the Jewish community that influenced this survey include: "The Innovation Ecosystem: Emergence of a New Jewish Landscape,"⁴ "Welcoming Synagogues: 2009 Synagogue Survey on Diversity and LGBT Inclusion,"⁵ Keshet's Synagogue Inclusion Survey⁵; "2010 LGBT Alliance Study: A Needs Assessment of the San Francisco Bay Area LGBT Jewish Community,"⁶ "We Are You: An Exploration of Lesbian, Gay, Bisexual, and Transgender Issues in Colorado's Jewish Community,"⁷ and "The 2009 Survey of Jewish Communal Service Professionals."⁸

The JOEI survey also relies on evaluation tools for LGBT inclusion developed by the Human Rights Campaign Foundation, including the Corporate Equality Index, Healthcare Equality Index and HRC's Welcoming Schools program. The JOEI survey relied on the best practices developed in these models to craft questions relating to non-discrimination policies that include sexual orientation and gender identity, transgender inclusion in the workplace and benefits for employees' partners and spouses.

The JOEI Advisory Board reviewed multiple drafts of the survey and provided input on question order, wording and thoroughness of the questions. (For a complete

list of members, see the back inside cover). The HRC Foundation then conducted a series of beta tests with a handful of national and local organizations selected to reflect the different type organizations that would populate the survey. Each beta test participant was asked what they thought the question was asking and what their answer would be based on their understanding of the question. Question wording was modified to boost reliability and validity of the data collected.

Population Development

The JOEI survey was open to all organizations within the Jewish community, from major national advocacy groups to small, local non-profits to synagogues that wanted to opt in. It is not designed to provide a statistically representative sample of Jewish organizations or any sub-set thereof. The findings in this report represent the efforts toward LGBT inclusion among participating organizations and may not be indicative of the community as a whole.

To spread awareness of and encourage participation in the survey, the HRC Foundation conducted extensive research, outreach and follow-up to a wide variety of organizations across the Jewish organizational sphere. Research staff developed a database of contact information for Jewish organizations based on publicly available information. Specific effort was made to ensure the diversity of organizations on the list with respect to size, religious affiliation (Humanist, Renewal, Reconstructionist, Reform, Conservative and Orthodox), geography, yearly budget and service type, including youth-oriented organizations, eldercare facilities and synagogues.

The Orthodox organizations that originally received an invitation to the JOEI survey were a handful of Orthodox camps and the congregational rabbis who signed the 2010 Statement of Principles. While all organizations were not only welcome but encouraged to participate, JOEI staff focused outreach efforts on organizations most likely to participate in the survey.

One important strategy employed was to seek the support of “parent” organizations (i.e., national organizations with a large number of local offices, affiliates or chapters) and request that these organizations encourage their networks to participate in the survey. HRC provided model language – including information on how to sign up for log-in information for the survey – and it was disseminated by the national organizations via email. A total of eight national headquarters agreed to help or offered to help. These organizations included the Jewish Federations of North America (JFNA), Jewish Community Centers Association (JCCA), National Council of Jewish Women (NCJW), Foundation for Jewish Camp (FJC), Association of Jewish Family and Children Services (AJFCA), RAVSAK: The Jewish Community Day School Network, United Synagogue of Conservative Judaism (USCJ) and the Union for Reform Judaism (URJ).

While some groups invited their entire networks to participate in the survey, others preferred to select a portion of their affiliates. To provide direction on which offices to invite, the HRC Foundation compiled data on specific states and cities with the largest Jewish populations pulled from the various research on this topic.⁹ With this information, a proportionate number of local offices (determined by the overall size of the national network) were invited from the following states with the largest Jewish populations: New York, California, Florida, New Jersey, Pennsylvania, Massachusetts, Illinois, Maryland, Ohio, and Georgia.¹⁰ Finally, as the survey was open to all interested organizations, word of mouth is likely responsible for some organizations' participation.

The final number of organizations that received an invitation directly from the HRC Foundation or information from a “parent” organization was 2,172.

Survey Dissemination

Invitations to the survey were sent in mid-November 2011 via email and U.S. Postal Service. The survey went live on Nov. 18, 2011. Organizations received multiple reminders

and were contacted via telephone by a member of the HRC Foundation staff to encourage participation and provide assistance in completing the survey. The final deadline to submit completed surveys was April 6, 2012.

Review

Organizations' survey submissions were reviewed by JOEI staff as they were submitted. Reviews of submissions were scheduled with the official submitters and contributors by email and conducted over the telephone. Reviews lasted approximately 20-30 minutes. They covered any areas of confusion and provided survey submitters and contributors with recommendations. Reviewers often got a more nuanced look at each organization's experience and were able to tailor suggestions based on these conversations.

A note about the survey response rate

As noted, the number of organizations that received an invitation directly from the HRC Foundation or information from a “parent” organization was 2,172. The total number of responses was 204. The original response goal for this survey was between 300 and 500 organizations. Given the nature of a first-time survey, the opt-in format and the historical knowledge of the early years and response rates of the HRC Corporate Equality Index and the Healthcare Equality Index, this response rate is deemed a success. Although unable to measure, the invitation to over 2,000 organizations of this survey on LGBT inclusion brought new and valuable information and resources to some of these groups, although we are unable to measure to what extent.

Organizations contacted by the HRC Foundation expressed a number of reasons for not participating in the survey. Many organizations felt that they were too small to participate because either they did not have articulated policies and practices relating to LGBT inclusion because of their size or because they felt they were able to set an inclusive tone without explicit policies. Some felt the issue was “old news” and that the organization had long since addressed LGBT inclusion and did not feel a need to revisit the issue. Of course many also were juggling competing interests and were not in a position to prioritize the LGBT inclusion at the time of the survey.

The Human Rights Campaign Foundation encourages organizations that did not complete the survey to review the questions in Appendix 2 of this report and use the survey as an educational tool to explore new, proactive opportunities to express their LGBT inclusivity. ★



Conclusion

This report focuses on accomplishments and highlights opportunities for improvement within Jewish organizations and the community as a whole in a framework that encourages education, dialogue and improvement in LGBT inclusivity.

One of the goals of JOEI was to create an opportunity for dialogue among Jewish community members about the advantages, opportunities and challenges of welcoming LGBT employees, families and volunteers into Jewish organizations.

This is important for several reasons:

- **We know even well-meaning organizations that think of themselves as “welcoming” are often not viewed as such by the local LGBT community.**
- **HRC’s work has shown that workplaces with inclusive policies and practices create more productive environments and help improve recruitment and retention.**
- **It is critical that LGBT youth can feel safe – especially in places of worship or among their peers in community organizations.**

As we face the most pressing issues in LGBT community – marriage equality, transgender rights, workplace protection, housing and public accommodations, access to healthcare, bullying, LGBT homeless youth – more organizations will need to fully embrace LGBT inclusion.

It is HRC’s hope that the survey and its questions are viewed as a resource for education and dialogue regarding these sensitive and important issues.

As with any research into organizational development that involves new and challenging issues, the survey does not tell the whole story of an organization’s journey on diversity and inclusion efforts. We encourage readers of this report to explore each organization featured in this project with an awareness of this limitation in our research.

We also encourage readers to continue the process. Many resources are available at www.hrc.org/joei. We also refer you to **Keshet**, a non-profit that works for the full inclusion of LGBT Jews in Jewish life which and provides a large variety of **trainings and resources** for Jewish organizations around the country as well as other Jewish LGBT organizations.

Appendices



Appendix One

JOEI 2012 Organizations and Scores / ● Yes / ● No

Organization Name	City	State	Location on JOEI Scale	Has a Non-Discrimination Policy	Policy Includes Sexual Orientation	Policy Includes Gender Identity
Adath Israel	Merion Station	PA	Adaptation	●	●	●
ALEPH: Alliance for Jewish Renewal	Philadelphia	PA	Inclusion	N/A		
Alpha Epsilon Pi	Indianapolis	IN	Contemplation	●	●	●
Ameinu	New York	NY	Inclusion	N/A		
American Israel Public Affairs Committee	Washington	DC	Exploration	●	●	●
American Jewish Committee of Los Angeles	Los Angeles	CA	Exploration	●	●	●
American Jewish Committee of San Francisco	San Francisco	CA	Inclusion	●	●	●
American Jewish Joint Distribution Committee	New York	NY	Adaptation	●	●	●
American Jewish World Service	New York	NY	Inclusion	●	●	●
Anshe Chesed Fairmount Temple	Beachwood	OH	Inclusion	N/A		
Anti-Defamation League (ADL)	New York	NY	Inclusion	●	●	●
Artis - Contemporary Israeli Art	New York	NY	Exploration	●	●	●
Association of Jewish Family and Children's Agencies	Baltimore	MD	Exploration	●	●	●
Augusta Jewish Community Center	Evans	GA	Contemplation	●		
Austin Jewish Academy	Austin	TX	Exploration	●	●	●
Avodah	New York	NY	Inclusion	●	●	●
Avodah of Washington	Washington	DC	Inclusion	●	●	●
Bay Ridge Jewish Center	Brooklyn	NY	Adaptation	●		
BBYO	Washington	DC	Inclusion	●	●	●
Beber Camp	Skokie	IL	Inclusion	●	●	●
Berkshire Hills Emanuel Camps	New York	NY	Inclusion	●	●	●
Bernard and Ruth Siegel Jewish Community Center	Wilmington	DE	Adaptation	●	●	●
Bet Tzedek	Los Angeles	CA	Inclusion	●	●	●
Birthright Israel Foundation	New York	NY	Inclusion	●	●	●
Boston University Hillel	Boston	MA	Inclusion	●	●	●
Boulder Jewish Community Center	Boulder	CO	Adaptation	●	●	●
Brown RISD Hillel	Providence	RI	Inclusion	●	●	●
Camp JRF: The Aaron and Marjorie Ziegelman Campus	Jenkintown	PA	Inclusion	●	●	●
Camp Judaea	Atlanta	GA	Inclusion	N/A		
Camp Livingston	Cincinnati	OH	Adaptation	●	●	●
Camp Ramah California	Encino	CA	Exploration	●	●	●
Camp Ramah Wisconsin	Chicago	IL	Exploration	●		
Camp Seneca Lake	Rochester	NY	Contemplation	●	●	●
Camp Shalom	Toronto	ON	Adaptation	●		
Camp Solomon Schechter	Seattle	WA	Inclusion	●	●	●
Camp Tawonga	San Francisco	CA	Inclusion	●	●	●
Columbia University Hillel	New York	NY	Inclusion	●	●	●
Columbus Jewish Federation	Columbus	OH	Contemplation	●	●	●
Combined Jewish Philanthropies	Boston	MA	Inclusion	●	●	●
Community Reform Temple	Westbury	NY	Adaptation	N/A		
Congregation Beth El Binah	Dallas	TX	Inclusion	N/A		
Congregation Beth Israel	Houston	TX	Adaptation	●	●	●
Congregation Beth Meier	Studio City	CA	Exploration	●		
Congregation B'Nai Torah	Antioch	CA	Contemplation	N/A		
Congregation P'nai Or	Portland	OR	Inclusion	N/A		
Congregation Rodeph Shalom	New York	NY	Inclusion	●	●	●
Congregation Sha'ar Zahav	San Francisco	CA	Inclusion	●		
Congregation Shaarei Shamayim	Madison	WI	Inclusion	●	●	●
Congregation Shir Hadash	Los Gatos	CA	Inclusion	●	●	●
Congregation Shir Tikvah	Troy	MI	Inclusion	●		
Eden Village Camp	Putnam Valley	NY	Adaptation	N/A		

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JOEI 2012 Organizations and Scores / ● Yes / ● No

Organization Name	City	State	Location on JOEI Scale	Has a Non-Discrimination Policy	Policy Includes Sexual Orientation	Policy Includes Gender Identity
Edith & Carl Marks JCH of Bensonhurst	Brooklyn	NY	Adaptation	●	●	●
Evelyn Rubenstein Jewish Community Center of Houston	Houston	TX	Contemplation	●	●	●
Footsteps	New York	NY	Inclusion	●		
Foundation for Jewish Camp	New York	NY	Inclusion	●	●	●
Foundation for Jewish Culture	New York	NY	Inclusion	●	●	●
George Washington University Hillel	Washington	DC	Inclusion	●	●	●
Germantown Jewish Centre	Philadelphia	PA	Inclusion	●	●	●
Golden Slipper Camp	Bala Cynwyd	PA	Contemplation	●	●	●
Habonim Dror	New York	NY	Inclusion	N/A		
Habonim Dror Camp Gilboa	Los Angeles	CA	Adaptation	●		
Habonim Dror Camp Moshava	Silver Spring	MD	Inclusion	●	●	●
Hadassah of Boston	Needham	MA	Contemplation	N/A		
Hazon	New York	NY	Adaptation	●		
Hebrew Tabernacle of Washington Heights	New York	NY	Contemplation	●		
Hillel at Binghamton	Binghamton	NY	Inclusion	●	●	●
Hillel at Kent State University	Kent	OH	Inclusion	●	●	●
Hillel at the University of Oregon	Eugene	OR	Inclusion	●	●	●
Hillel: The Foundation for Jewish Campus Life	Washington	DC	Inclusion	●	●	●
IKAR	Los Angeles	CA	Inclusion	●	●	●
InterfaithFamily.com	Newton	MA	Inclusion	●	●	●
Jewish Agency	New York	NY	Contemplation	●	●	●
Jewish Board of Family and Children's Services	New York	NY	Inclusion	●	●	●
Jewish Center & Federation of the Twin Tiers	Elmira	NY	Adaptation	●		
Jewish Center for Community Services	Bridgeport	CT	Adaptation	●	●	●
Jewish Community Center	Summit	NJ	Adaptation	N/A		
Jewish Community Center in Manhattan	New York	NY	Inclusion	●	●	●
Jewish Community Center Maccabi Camp Kingswood	Newton	MA	Exploration	N/A		
Jewish Community Center of Chicago	Chicago	IL	Inclusion	●	●	●
Jewish Community Center of Greater Baltimore	Owings Mills	MD	Adaptation	●	●	●
Jewish Community Center of Greater Pittsburgh	Pittsburgh	PA	Adaptation	●	●	●
Jewish Community Center of Greater Rochester	Rochester	NY	Exploration	●	●	●
Jewish Community Center of Greater Washington	Rockville	MD	Inclusion	●	●	●
Jewish Community Center of Northern Virginia	Fairfax	VA	Exploration	●	●	●
Jewish Community Center of Rockland County	West Nyack	NY	Adaptation	●	●	●
Jewish Community Center of San Francisco	San Francisco	CA	Inclusion	●	●	●
Jewish Community Center of Staten Island	Staten Island	NY	Exploration	●	●	●
Jewish Community Center of the East Bay	Berkeley	CA	Adaptation	●	●	●
Jewish Community Centers Association of North America	New York	NY	Adaptation	●	●	●
Jewish Community Federation of San Francisco	San Francisco	CA	Inclusion	N/A		
Jewish Community of Louisville, Inc.	Louisville	KY	Adaptation	●	●	●
Jewish Community Relations Council of Greater Boston	Boston	MA	Adaptation	●	●	●
Jewish Community Services of South Florida	Aventura	FL	Inclusion	●	●	●
Jewish Council for Public Affairs	New York	NY	Inclusion	●	●	●
Jewish Education Service of North America	New York	NY	Exploration	●	●	●
Jewish Family & Children's Service of St. Louis	St. Louis	MO	Contemplation	●	●	●
Jewish Family & Children's Services of the East Bay	Berkeley	CA	Inclusion	●	●	●
Jewish Family and Career Services	Atlanta	GA	Inclusion	●	●	●
Jewish Family and Child Service of Greater Toronto	Toronto	ON	Inclusion	●	●	
Jewish Family and Children's Service of Minneapolis	Minneapolis	MN	Inclusion	●	●	●
Jewish Family Service Agency	Vancouver	BC	Exploration	●	●	●
Jewish Family Service of Colorado	Denver	CO	Adaptation	●	●	●



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JOEI 2012 Organizations and Scores / ● Yes / ● No

Organization Name	City	State	Location on JOEI Scale	Has a Non-Discrimination Policy	Policy Includes Sexual Orientation	Policy Includes Gender Identity
Jewish Family Service of San Diego	San Diego	CA	Inclusion	●	●	●
Jewish Family Services of Ottawa	Ottawa	ON	Inclusion	●	●	●
Jewish Federation of Cincinnati	Cincinnati	OH	Adaptation	●	●	●
Jewish Federation of Cleveland	Cleveland	OH	Adaptation	●	●	●
Jewish Federation of Greater Ann Arbor	Ann Arbor	MI	Adaptation	●	●	●
Jewish Federation of Greater Dallas	Dallas	TX	Contemplation	●	●	●
Jewish Federation of Greater New Haven	Woodbridge	CT	Contemplation	●	●	●
Jewish Federation of Greater New Orleans	Metairie	LA	Exploration	●	●	●
Jewish Federation of Greater Philadelphia	Philadelphia	PA	Adaptation	●	●	●
Jewish Federation of Greater Pittsburgh	Pittsburgh	PA	Adaptation	●	●	●
Jewish Federation of Greater Portland	Portland	OR	Inclusion	●	●	●
Jewish Federation of Monmouth County	Manalapan	NJ	Contemplation	●		
Jewish Federation of Rockland County	West Nyack	NY	Exploration	N/A		
Jewish Federation of San Diego County	San Diego	CA	Adaptation	●	●	●
Jewish Federation of South Palm Beach County	Boca Raton	FL	Exploration	●	●	●
Jewish Federation of St. Joseph Valley	South Bend	IN	Adaptation	●		
Jewish Federation of the Bluegrass	Lexington	KY	Adaptation	●		
Jewish Funders Network	New York	NY	Inclusion	●	●	●
Jewish Home Lifecare	New York	NY	Adaptation	●	●	●
Jewish National Fund	New York	NY	Inclusion	●	●	●
Jewish Outreach Institute	New York	NY	Inclusion	●	●	●
Jewish Women International	Washington	DC	Inclusion	●	●	●
Jews United for Justice	Washington	DC	Inclusion	●	●	●
JOIN for Justice	Boston	MA	Inclusion	●	●	●
JoshuaVenture Group	New York	NY	Inclusion	●	●	●
Jumpstart	Los Angeles	CA	Inclusion	●	●	●
Kol Tikvah	Woodland Hills	CA	Adaptation	●		
Lawrence Family Jewish Community Center	La Jolla	CA	Exploration	●	●	●
LimmudLA	Los Angeles	CA	Inclusion	●		
Luria Academy of Brooklyn	Brooklyn	NY	Adaptation	●		
Madison Jewish Community Day School	Madison	WI	Exploration	N/A		
Mayyim Hayyim Living Waters Community Mikveh & Education Center	Newton	MA	Inclusion	●	●	●
Moishe Foundation	Oakland	CA	Inclusion	●	●	●
National Council of Jewish Women	New York	NY	Inclusion	●	●	●
National Council of Jewish Women Austin	Austin	TX	Exploration	●		
National Council of Jewish Women Los Angeles	Los Angeles	CA	Inclusion	●	●	●
National Council of Jewish Women St. Louis	St. Louis	MO	Adaptation	●	●	●
New Community Jewish High School	West Hills	CA	Exploration	●	●	●
New Israel Fund	New York	NY	Inclusion	●	●	●
New York University Hillel	New York	NY	Inclusion	●	●	●
Northwestern University Hillel (Fiedler Hillel)	Evanston	IL	Inclusion	N/A		
Peninsula Jewish Community Center	Foster City	CA	Adaptation	●	●	●
Pennsylvania State University Hillel	University Park	PA	Inclusion	●	●	●
Pinemere Camp	Philadelphia	PA	Inclusion	●	●	●
Presentense Group	New York	NY	Exploration	●	●	●
Pressman Academy of Temple Beth Am	Los Angeles	CA	Contemplation	●		
Rabbis for Human Rights	New York	NY	Inclusion	●	●	●
Ramah Outdoor Adventure	Denver	CO	Contemplation	●	●	●
Ravsak: The Jewish Community Day School Network	New York	NY	Inclusion	●	●	●
Reconstructionist Rabbinical College	Wyncote	PA	Inclusion	●	●	●
Repair the World	New York	NY	Inclusion	●	●	●

Appendix One

JOEI 2012 Organizations and Scores / ● Yes / ● No

Organization Name	City	State	Location on JOEI Scale	Has a Non-Discrimination Policy	Policy Includes Sexual Orientation	Policy Includes Gender Identity
Robert E. Loup Jewish Community Center	Denver	CO	Exploration	●	●	●
Rutgers University Hillel	New Brunswick	NJ	Inclusion	●	●	●
Sabes Jewish Community Center	Minneapolis	MN	Inclusion	●	●	●
Shomrei Torah	Wayne	NJ	Contemplation	●	●	●
Shoshana S. Cardin School	Baltimore	MD	Adaptation	●	●	●
Sixth & I Historic Synagogue	Washington	DC	Inclusion	●	●	●
Society for Humanistic Judaism	Farmington Hills	MI	Adaptation	●	●	●
St. Louis Hillel at Washington University in St. Louis	St. Louis	MO	Inclusion	●	●	●
Stamford Jewish Community Center	Stamford	CT	Exploration	●	●	●
Temple Adat Elohim	Thousand Oaks	CA	Adaptation	●	●	●
Temple Beth Am	Pinecrest	FL	Inclusion	●	●	●
Temple Beth El	Geneva	NY	Contemplation	N/A	●	●
Temple Beth El of South Orange County	Aliso Viejo	CA	Adaptation	●	●	●
Temple Beth Emeth	Ann Arbor	MI	Adaptation	●	●	●
Temple Beth Israel	Redding	CA	Contemplation	N/A	●	●
Temple Beth Or	Brick	NJ	Adaptation	N/A	●	●
Temple Beth Shalom	Long Beach	CA	Exploration	N/A	●	●
Temple Beth Shalom	Mahopac	NY	Adaptation	N/A	●	●
Temple Beth-El	Poughkeepsie	NY	Inclusion	●	●	●
Temple Beth Shalom of Orange County	Santa Ana	CA	Inclusion	●	●	●
Temple Emeth	Delray Beach	FL	Contemplation	●	●	●
Temple Hesed	Scranton	PA	Inclusion	N/A	●	●
Temple Shalom	Aberdeen	NJ	Inclusion	●	●	●
Temple Shalom	Succasunna	NJ	Inclusion	N/A	●	●
Temple Shalom of Newton	Newton	MA	Inclusion	●	●	●
Temple Sinai	Delray Beach	FL	Adaptation	●	●	●
The Community Synagogue	Port Washington	NY	Adaptation	●	●	●
The Jewish Community Center of Greater Columbus	Columbus	OH	Exploration	●	●	●
The Jewish Federation of Greater Washington	Rockville	MD	Inclusion	●	●	●
The Jewish Federation of the Berkshires	Pittsfield	MA	Contemplation	●	●	●
The Jewish Federations of North America	New York	NY	Inclusion	●	●	●
Tikkun V'or	Ithaca	NY	Adaptation	N/A	●	●
Touro Synagogue New Orleans	New Orleans	LA	Adaptation	●	●	●
Tufts University Hillel Foundation	Medford	MA	Inclusion	●	●	●
Union for Reform Judaism	New York	NY	Inclusion	●	●	●
University of Arizona Hillel	Tucson	AZ	Inclusion	●	●	●
University of Central Florida Hillel	Oviedo	FL	Adaptation	●	●	●
University of Florida Hillel	Gainesville	FL	Inclusion	●	●	●
University of Hartford Hillel	West Hartford	CT	Inclusion	●	●	●
University of Maryland, Baltimore County Hillel	Baltimore	MD	Inclusion	●	●	●
University of Pennsylvania Hillel	Philadelphia	PA	Inclusion	●	●	●
University of Rhode Island Hillel	Kingston	RI	Inclusion	●	●	●
University of Washington Hillel	Seattle	WA	Inclusion	●	●	●
URJ Camp Harlam	Bala Cynwyd	PA	Adaptation	●	●	●
URJ Camp Newman	San Rafael	CA	Inclusion	●	●	●
URJ Greene Family Camp	Bruceville	TX	Adaptation	●	●	●
Washington DC Jewish Community Center	Washington	DC	Inclusion	●	●	●
West Suburban Temple Har Zion	River Forest	IL	Adaptation	●	●	●
Westside Jewish Community Center	Los Angeles	CA	Adaptation	●	●	●
Yale University Hillel	New Haven	CT	Inclusion	●	●	●
York Jewish Community Center	York	PA	Exploration	●	●	●



Appendix Two

JOEI 2012 Survey

1. Organization and Contact Information

* Required

1. Your Organization's Information

Name

The name as it appears on this survey (see the top of this page) will also be used for reporting purposes. We use the formal names of organizations and use AP Style formatting for our records and reports.

If you wish to update your organization's name or prefer us to use your organization's acronym, please select "get help" below and submit supporting information.

* Street Address Line 1

e.g.: 123 Alphabet St.

Street Address Line 2

e.g.: Suite 123 or Mailstop A-123

* City

* State

* Zip

* Main Phone Number

e.g.: 123-456-7890 x123

2. LGBT-Inclusive Organization Efforts

* Required

1.* Has this location made any effort to specifically recruit openly LGBT employees in the past THREE years?

There are many ways organizations can make efforts to recruit LGBT employees: include a fully inclusive non-discrimination policy in job posting; reach out to local LGBT/LGBT Jewish organizations and newspapers when hiring; attend LGBT/LGBT Jewish conferences and more.

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more
- ☐ Not applicable

1a. If YES on Q1, please describe one effort below. Please include date, place (if online, indicate "web") and description of the effort.

2.* Has this location made any effort to specifically recruit openly LGBT people to your organization's lay leadership board in the past THREE years?

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more

2a. If YES on Q2, please describe one effort below. Please include date, place (if online, indicate "web") and description of the effort.

3.* Has this location created a committee or taskforce of lay leadership to address organizational diversity issues in the past THREE years?

- ☐ Yes
- ☐ No

Appendix Two

JOEI 2012 Survey

3a. If YES on Q3, has this committee or taskforce specifically discussed LGBT diversity in the past THREE years?

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more

4.* Has this location received diversity and inclusion training in the past THREE years?

- ☐ Yes
- ☐ No

4a. If YES to Q4, has this location received diversity/inclusion training that specifically discussed LGBT issues in the past THREE years?

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more

5.* Has this location reached out to local or national LGBT organizations for advice, training or other assistance with delivery of services or outreach to the LGBT community in the past THREE years?

Working with local or national LGBT organizations is a great starting point for receiving training, getting ideas for LGBT programming, etc.

- ☐ To learn about ways to work with local or national LGBT organizations, click here and see p.5.
- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more

6. Please provide any additional information about your location's LGBT-inclusive general organizational efforts, including information about specific efforts, successes or challenges.

3. Images, Language and Communication

* Required

1.* Does this location utilize publicity materials or publications?

Examples of publicity materials include: websites, brochures/pamphlets, learning guides, etc.

- ☐ Yes
- ☐ No

1a. If YES on Q1, does this location use any of the following language in its publicity materials or publications (please check all that apply)?

Sexual Orientation: The term "sexual orientation" is the preferred term used when referring to an individual's physical and/or emotional attraction to the same and/or different gender. "Heterosexual," "bisexual" and "homosexual" are all sexual orientations. A person's sexual orientation is distinct from a person's gender identity and expression.

Gender Identity: The term "gender identity," distinct from the term "sexual orientation," refers to a person's innate, deeply felt psychological identification as male or female, which may or may not correspond to the person's body or designated sex at birth (meaning what sex was originally listed on a person's birth certificate).

Gender Expression: The term "gender expression" refers to all of the external characteristics and behaviors that are socially defined as either masculine or feminine, such as dress, grooming, mannerisms, speech patterns and social interactions. Social or cultural norms can vary widely and some characteristics that may be accepted as masculine, feminine or neutral in one culture may be viewed differently in another.

Notes: The terms "sexual preference" and "gender" are not equivalent to "sexual orientation" and "gender identity."

- ☐ Significant Other
- ☐ Partner (when referring to individuals in a relationship)
- ☐ Sexual Orientation
- ☐ Gender Identity and/or Expression
- ☐ Gay and Lesbian
- ☐ Lesbian, Gay, Bisexual and Transgender (or LGBT/GLBT)
- ☐ Same-Sex and/or Same-Gender
- ☐ "Parent 1/Parent 2" or "Guardian 1/Guardian 2" instead of "Mother/Father"



Appendix Two

JOEI 2012 Survey

2.* Does this location use images of families, couples, individuals or gatherings in any of its publicity materials and publications?

- ☐ Yes
- ☐ No

2a. If YES to Q2, does this location use images of LGBT families, couples, individuals, gatherings or symbols in any of its publicity materials or publications?

- ☐ Yes
- ☐ No

3.* Does this location have a newsletter?

- ☐ Yes
- ☐ No

3a. If YES on Q3, does this location ever include LGBT specific articles or content in its newsletter?

Examples include: op-eds, event announcements, etc.

- ☐ Yes
- ☐ No

3b. If YES on Q3, does this location include announcements for different-sex couples or families celebrating life cycle events in its newsletter?

Life cycle events include: b'nai mitzvot, weddings, bris and baby naming announcements, etc.

- ☐ Yes
- ☐ No

3c. If YES on Q3b, does this location include announcements for same-sex couples or families celebrating life cycle events in its newsletter?

Life cycle events include: marriage/commitment ceremonies, adoption/baby birth announcements, etc.

- ☐ Yes
- ☐ No, but would if approached
- ☐ No
- ☐ No, but our organization is interested in learning more

4. Please provide any additional information about this location's LGBT language, images and communication, including information about specific efforts, successes or challenges.

Information provided here will not affect your rating.

4. Independent, Regional, Local, Associated or Affiliated Office Specific Questions

* Required

Answer "No" to Q1 in this section if your location is the headquarters or central office of a national organization with one or more local, regional, associated or affiliated offices. Please instead fill out Section 5 (Headquarters or Central Office Specific Questions).

1.* Is this location an independent entity OR regional, local, associated or affiliated office of a national organization?

Independent entity: Organization that is comprised of one office and provides the majority of its HR and benefit policies internally.

Regional or local office (Shared HR and Programmatic Functions): Offices/organizations that are local or regional branches of larger national organizations that receive the majority of their HR and benefit policies from their national headquarters. Examples include a local AJC office or a regional BBYO office.

Associated office (Shared HR Function only): These offices/organizations receive the majority of their HR and benefit policies from a larger national office, but are not branches of the larger national office. They may administer their own affiliates. Examples include NFTY and USY offices.

Affiliated office (Shared Programmatic Function only): These offices/organizations are part of a network that work with a central office to organize efforts, but do not receive the majority of their HR and benefit policies from the central office. A JCC or Jewish Federation is an example of an affiliated office.

Headquarters: The lead office of a national organization with one or more regional, local or associated offices that provides the majority of HR and benefit policies for itself, as well as its regional, local and/or associated offices.

Central Office: The lead office responsible for coordinating collaboration between a network of affiliated organizations, but not responsible for providing HR and benefit policies for their affiliated organizations.

- ☐ Yes, this location is an independent entity OR a regional, local, associated or affiliated office
- ☐ No, this location is a central office OR headquarters

Appendix Two

JOEI 2012 Survey

1a. Who is responsible for providing the majority of this location's HR and benefit policies?

- ☐ We set the majority of our HR and benefit policies.
- ☐ A headquarters or central office sets the majority of our HR and benefit policies.
- ☐ A third party organization sets the majority of our HR and benefit policies
- ☐ Not applicable

1b. If HEADQUARTERS/CENTRAL OFFICE or THIRD PARTY on Q1a, please list the name, address and contact information for the organization that sets the majority of your HR and benefit policies:

1c. Please indicate the number of paid staff at this location:

2. Are any of this location's general programs and services explicitly welcoming of LGBT participants or clients?

General programming or services are programming or services where the intended audience is the community as a whole.

While many organizations may feel that their programming is welcoming at face value, LGBT individuals are often unsure of where they are or are not welcome. LGBT community members are more likely to attend events when organizations explicitly state that LGBT families/individuals/couples are welcome.

- ☐ Yes, all
- ☐ Yes, some
- ☐ No, none
- ☐ No, but our organization is interested in learning more

3. Does this location offer any LGBT-specific programming or services?

LGBT-specific programming or services are programming or services intended primarily for a LGBT audience.

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more

4. Has this location made any specific efforts to attract openly LGBT community members or clients to its programs or services in the past THREE years?

- ☐ Yes
- ☐ No

5. For membership purposes, are same-sex partners and/or same-sex parent headed families eligible for a family membership at this location?

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more
- ☐ Not applicable, our organization is not membership based

6. Please provide any additional information about this location's LGBT programs and/or membership practices, including information about specific programs, successes or challenges.

Information provided here will not affect your rating.

5. Headquarters or Central Office Specific Questions

* Required

Only answer "Yes" to Q1 for EITHER this section OR Section 4 (Independent, Regional, Local or Affiliated Office Specific Questions).

1.* Is this location the headquarters or central office of a national organization with one or more local, regional, associated or affiliated offices?

Headquarters: The lead office of a national organization with one or more regional, local or associated offices that provides the majority of HR and benefit policies for itself, as well as its regional, local and/or associated offices.

Central Office: The lead office responsible for coordinating collaboration between a network of affiliated organizations, but not responsible for providing HR and benefit policies for their affiliated organizations.

- ☐ Yes
- ☐ No



Appendix Two

JOEI 2012 Survey

1a. If YES on Q1, does this location set human resources (HR) and benefit policies for the majority of your regional, local, associated or affiliated offices?

- ☐ Yes
- ☐ No

1b. Please indicate the number of paid staff at this location:

2. If YES on Q1, does this location offer guidelines, resources, training or consulting on membership or clientele recruitment and/or retention to any of its local, regional, associated or affiliated offices?

- ☐ Yes
- ☐ No

2a. If YES on Q2, do any of these guidelines, resources, trainings or consulting on membership or clientele recruitment and/or retention specifically discuss the recruitment and/or retention of LGBT members?

These guidelines, resources, trainings or consulting can be free standing or incorporated into larger efforts.

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more

3. Does this location offer program models, guidelines or resources for use in any of its local, regional, associated or affiliated offices?

- ☐ Yes
- ☐ No

3a. If YES on Q3, do any of these program models, guidelines or resources specifically discuss how to make general programming more inclusive of LGBT participants or clients?

These program models, guidelines or resources can be free standing or incorporated into larger efforts.

While many organizations may feel that their programming is welcoming at face value, LGBT individuals are often unsure of where they are or are not welcome. LGBT community members are more likely to attend events when organizations explicitly state that LGBT families/individuals/couples are welcome.

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more

3b. If YES on Q3, do any of these program models, guidelines or resources discuss how to create LGBT-specific programming?

LGBT-specific programming or services are programming or services intended primarily for a LGBT audience.

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more

4. Does this location offer sample membership or clientele materials for use in its local, regional, associated or affiliated offices?

Examples of sample membership or clientele materials include: sign-up forms, information packets, etc.

- ☐ Yes
- ☐ No

4a. If YES on Q4, do these sample membership or clientele materials use LGBT-inclusive language?

An example of LGBT inclusive language would be "Parent 1/ Parent 2" instead of "Mother/Father."

Same-sex couples and their children often feel unwelcome when forms and materials leave no room to accurately describe their own families.

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more

Appendix Two

JOEI 2012 Survey

5. Please provide any additional information about this location's efforts towards creating LGBT-inclusive local, regional or affiliated offices, including information about specific programs, successes or challenges.

Information provided here will not affect your rating.

6. Issue Advocacy and Initiatives

* Required

1.* During the past THREE years, has this location engaged in issue advocacy on behalf of any local, state, federal or international legislation or initiatives?

- ☐ Yes
- ☐ No

1a. If YES on Q1, during the past THREE years, has this location publicly supported LGBT equality through local, state, federal or international legislation or initiatives?

Examples of supporting LGBT equality through local, state, federal or international legislation or initiatives could include: joining a coalition in favor of LGBT equal employment legislation; signing a petition against the bullying of LGBT youths; etc.

- ☐ Yes
- ☐ No

1b. If YES to Q1a, has this location supported LGBT equality in any of the following policy areas in the past THREE years (please check all that apply):

- ☐ Anti-Bullying
- ☐ Healthcare Equality
- ☐ Same-Sex Relationship Recognition (Domestic Partnerships/Civil Unions/Marriage Equality)
- ☐ Workplace Non-Discrimination
- ☐ Hate Crime Legislation
- ☐ LGBT Issues Abroad
- ☐ HIV/AIDS Awareness and Prevention
- ☐ Military Service Equality
- ☐ Other, please specify below
- ☐ If Other, please specify:

1c. If YES on Q1a, please describe in detail one example of this location's actions in support of LGBT equality. Please include date, place (if online, indicate "web"), and description of the event/initiative.

2. Please provide any additional information about this location's experience with LGBT issue advocacy, including information about specific efforts, successes or challenges.

Information provided here will not affect your rating.

7. Schools, Camps and Youth Movements

* Required

1.* Is this location—or any program at this location—a school, camp or youth movement?

For example, this includes JCCs that run summer camp programs.

- ☐ Yes
- ☐ No

1a. If YES on Q1, does this location have a written policy protecting children/adolescents from bias-based bullying, harassment or discrimination?

Bias-based bullying, harassment or discrimination is bullying based on an unfair dislike of a particular sub-group (i.e. bullying based on ethnicity or national origin would be considered bias-based bullying).

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more



Appendix Two

JOEI 2012 Survey

1b. If YES to Q1a, on what bases does this location's written policy protect children/adolescents from bias-based bullying, harassment or discrimination (please check all that apply):

Sexual Orientation: The term "sexual orientation" is the preferred term used when referring to an individual's physical and/or emotional attraction to the same and/or different gender. "Heterosexual," "bisexual" and "homosexual" are all sexual orientations. A person's sexual orientation is distinct from a person's gender identity and expression.

Gender Identity: The term "gender identity," distinct from the term "sexual orientation," refers to a person's innate, deeply felt psychological identification as male or female, which may or may not correspond to the person's body or designated sex at birth (meaning what sex was originally listed on a person's birth certificate).

Gender Expression: The term "gender expression" refers to all of the external characteristics and behaviors that are socially defined as either masculine or feminine, such as dress, grooming, mannerisms, speech patterns and social interactions. Social or cultural norms can vary widely and some characteristics that may be accepted as masculine, feminine or neutral in one culture may be viewed differently in another.

Notes: Having "sexual preference" or "gender" as a protected category in your anti-bullying, harassment or discrimination policy does not satisfy this criteria.

- ☐ Nationality
- ☐ Race
- ☐ Religion
- ☐ Sexual Orientation
- ☐ Ability/Disability
- ☐ Gender Identity
- ☐ Language
- ☐ Appearance and Physical Attributes
- ☐ Other, please specify below
- ☐ Not applicable - we do not enumerate protected groups in our bullying, harassment or
- ☐ discrimination policy

If Other, please specify:

1c. If YES to Q1a, please attach a copy of your written bullying, harassment or discrimination policy as a Rich Text Format (.rtf), Microsoft Word (.doc or .docx) or Adobe Acrobat (.pdf) file.

A PDF of the policy, including the title, as seen on your public website — or, alternatively, from the employee handbook — is preferred.

Troubleshooting: If you experience problems uploading the file, save this section as "Draft" and try again later. If you continue to experience problems, please fax a copy of the policy to 866-369-3348.

2. Has this location held workshops or training sessions about diverse families (or arranged one through an outside party) in the past THREE years?

These workshops could be for staff, youths, or guardians.

- ☐ Yes
- ☐ No

2a. If YES on Q2, Has this location held workshops or training sessions about diverse families (or arranged one through an outside party), specifically discussing LGBT families, in the past THREE years?

These workshops could be for staff, youths, or guardians. These trainings can be free standing LGBT family trainings or incorporated into general diverse families workshops or trainings.

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more

3. Has this location held workshops or training sessions about name-calling and bullying (or arranged one through an outside party) in the past THREE years?

These workshops could be for staff, youths, or guardians.

- ☐ Yes
- ☐ No

3a. If YES on Q3, has this location held workshops or training sessions about name-calling and bullying (or arranged one through an outside party), specifically discussing LGBT bullying, in the past THREE years?

These workshops could be for staff, youths, or guardians. These trainings can be free standing LGBT bullying trainings or incorporated into general name-calling/bullying workshops or trainings.

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more

Appendix Two

JOEI 2012 Survey

4. Has this location held workshops or training sessions about gender-stereotyping (or arranged one through an outside party) in the past THREE years?

These workshops could be for staff, youths, or guardians.

Gender-Stereotyping: Children and adolescents receive many messages about gender roles and gender identity. These gender roles pressure children and adolescents to conform to behaviors that may limit their full developmental potential. Moreover, children who do not adopt traditional gender roles are often targeted for harassment and bullying, all of which can be prevented through lessons on gender-stereotyping.

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more

5. Does this location ever provide gender-specific housing for youth participants?

Gender-Specific Housing: The term "gender-specific housing" refers to housing that is separated by gender. For example, many camps may select to have a section of housing for male campers and another section for female campers. Likewise, overnight youth group retreats may have boys sleep in one room and girls in another.

This housing may be temporary or permanent/long-term.

- ☐ Yes
- ☐ No

5a. If YES on Q5, does this location provide flexible housing options for transgender (or transitioning) youths in order to create the most comfortable housing situation?

Transgender: The term "transgender" refers to a broad range of people who experience and/or express their gender differently from what most people expect. This may mean expressing a gender that does not match the sex listed on their original birth certificate, or physically changing their sex in a process called "transitioning." "Transgender" is an umbrella term encompassing people who are transsexual, cross-dressers or otherwise gender non-conforming.

Transitioning: Transitioning is the process of changing one's external gender presentation to accord with one's internal sense of gender, often called "gender identity."

Transitioning is a process, not an event, and does not necessarily include medical intervention. Although transitioning can include surgery or hormone therapy, it may simply involve changes in clothing, grooming or body language.

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more

6. Please provide any additional information about this location's efforts working towards LGBT inclusion, including information about specific efforts or programs, successes or challenges

8. Eldercare Service Providers

* Required

1.* Is this location—or any part of this location—an eldercare facility?

- ☐ Yes
- ☐ No

1a. If YES on Q1, does this location have a "Patients' Bill of Rights" or patient non-discrimination policy?

- ☐ Yes
- ☐ No

1b. If YES to Q1a, does this location's "Patients' Bill of Rights" or patient non-discrimination policy include the term "sexual orientation"?

Sexual Orientation: The term "sexual orientation" is the preferred term used when referring to an individual's physical and/or emotional attraction to the same and/or different gender. "Heterosexual," "bisexual" and "homosexual" are all sexual orientations. A person's sexual orientation is distinct from a person's gender identity and expression.

Note: Having "sexual preference" as a protected category in your "Patients' Bill of Rights" or patient non-discrimination policy does not satisfy this criteria.

- ☐ Yes
- ☐ No



Appendix Two

JOEI 2012 Survey

1c. If YES to Q1a, does this location's "Patients' Bill of Rights" or patient non-discrimination policy include the term "gender identity and expression"?

Gender Identity: The term "gender identity," distinct from the term "sexual orientation," refers to a person's innate, deeply felt psychological identification as male or female, which may or may not correspond to the person's body or designated sex at birth (meaning what sex was originally listed on a person's birth certificate).

Gender Expression: The term "gender expression" refers to all of the external characteristics and behaviors that are socially defined as either masculine or feminine, such as dress, grooming, mannerisms, speech patterns and social interactions. Social or cultural norms can vary widely and some characteristics that may be accepted as masculine, feminine or neutral in one culture may be viewed differently in another.

Note: Having "gender" as a protected category in your "Patients' Bill of Rights" or patient non-discrimination policy does not satisfy this criteria.

- ☐ Yes
- ☐ No

1d. If YES to Q1a, please attach a copy of your "Patients' Bill of Rights" or patient non-discrimination policy:

Must be attached as a Rich Text Format (.rtf), Microsoft Word (.doc or .docx) or Adobe Acrobat (.pdf) file.

A PDF of the policy, including the title, as seen on your public website — or, alternatively, from the employee handbook — is preferred.

Troubleshooting: If you experience problems uploading the file, save this section as "Draft" and try again later. If you continue to experience problems, please fax a copy of the policy to 866-369-3348.

2. Does this location have a visitation policy (or policies)?

- ☐ Yes
- ☐ No

2a. If YES on Q2, does this location's visitation policy (or policies) contain inclusive language that explicitly grants same-sex couples (spouses/partners) the same access as different-sex couples and next-of-kin?

Examples of sufficient visitation policy language include:

- explicitly inclusive definition of family within the policy; or,
- referencing an explicitly inclusive definition of family, as part of a companion "definitions" policy section, within the policy; or,
- including explicit reference to equal access for same-sex couples within the policy; or,
- prohibiting discrimination in visitation access based on "sexual orientation" and "gender identity" within the facility's policy.

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more

2b. If YES on Q2, please attach a copy of your visitation policy:

Must be attached as a Rich Text Format (.rtf), Microsoft Word (.doc or .docx) or Adobe Acrobat (.pdf) file.

A PDF of the policy, including the title, as seen on your public website — or, alternatively, from the employee handbook — is preferred.

Troubleshooting: If you experience problems uploading the file, save this section as "Draft" and try again later. If you continue to experience problems, please fax a copy of the policy to 866-369-3348.

3. Does this location provide the opportunity to complete advance healthcare directive (AHD) forms at intake?

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more

4. Does this location counsel LGBT individuals under its care on their right to designate their partner/spouse/significant other or someone else as medical decision maker when advising them of AHD rights?

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more

Appendix Two

JOEI 2012 Survey

-
5. In instances where the patient is incapacitated and no AHD is known to exist, does this location require the patient's different-sex spouse to provide proof of his/her relationship to the patient in order to serve as surrogate decision maker?

- ☐ Yes
- ☐ No

-
- 5a. In instances where the patient is incapacitated and no AHD is known to exist, does this location require the patient's same-sex partner/spouse to provide proof of his/her relationship to the patient in order to serve as surrogate decision maker?

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more

-
6. Is any part of this location a residential facility?

- ☐ Yes
- ☐ No

-
- 6a. If YES on Q6, does this location allow different-sex couples to cohabitate in the same room/residence?

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more

-
- 6b. If YES on Q6a, does this location allow same-sex couples to cohabitate in the same room/residence?

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more

-
7. Please provide any additional information about this location's efforts towards LGBT inclusion, including information about specific efforts, successes or challenges.

Information provided here will not affect your rating.

9. Non-Discrimination/Equal Employment Opportunity Policy

* Required

-
- 1.* Does this location have a non-discrimination or equal employment opportunity policy (EEO)?

- ☐ Yes
- ☐ No
- ☐ Not applicable

-
- 1a. If YES on Q1, does this location's non-discrimination or equal employment opportunity policy include the term "sexual orientation"?

Sexual Orientation: The term "sexual orientation" is the preferred term used when referring to an individual's physical and/or emotional attraction to the same and/or different gender. "Heterosexual," "bisexual" and "homosexual" are all sexual orientations. A person's sexual orientation is distinct from a person's gender identity and expression.

Notes: Having "sexual preference" as a protected category in your non-discrimination or equal employment opportunity policy does not satisfy this criteria.

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more



Appendix Two

JOEI 2012 Survey

1b. If YES on Q1, does this location's non-discrimination or equal employment opportunity policy include the terms "gender identity" or "gender identity and expression"?

Gender Identity: The term "gender identity," distinct from the term "sexual orientation," refers to a person's innate, deeply felt psychological identification as male or female, which may or may not correspond to the person's body or designated sex at birth (meaning what sex was originally listed on a person's birth certificate).

Gender Expression: The term "gender expression" refers to all of the external characteristics and behaviors that are socially defined as either masculine or feminine, such as dress, grooming, mannerisms, speech patterns and social interactions. Social or cultural norms can vary widely, and some characteristics that may be accepted as masculine, feminine or neutral in one culture may be viewed differently in another.

Note: Having "gender" as a protected category in your non-discrimination or equal employment opportunity policy does not satisfy this criteria.

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more

1c. If YES on Q1, does this location require new hires to review its non-discrimination policy (or policy manual in which the non-discrimination code is written) upon hiring?

This includes requiring new hires to sign forms attesting to reading the policy or manual or specific trainings focused on the policy or manual.

- ☐ Yes
- ☐ No

1d. If YES on Q1, please attach a copy of this location's non-discrimination or equal employment opportunity policy:

Must be attached as a Rich Text Format (.rtf), Microsoft Word (.doc or .docx) or Adobe Acrobat (.pdf) file.

A PDF of the policy, including the title, as seen on your public website — or, alternatively, from the employee handbook — is preferred.

Troubleshooting: If you experience problems uploading the file, save this section as "Draft" and try again later. If you continue to experience problems, please fax a copy of the policy to 866-369-3348.

2. Please provide any additional information about this location's non-discrimination or EEOP, including information about specific efforts, successes or challenges.

Information provided here will not affect your rating.

10. Employment Benefits

* Required

1.* Does this location offer any employment benefits to its employees?

This question refers to any potential benefit, not exclusively healthcare benefits.

- ☐ Yes
- ☐ No
- ☐ Not applicable

1a. Are the following benefits offered to employees, their different-sex spouses, and/or their same-sex spouses or partners?

Health/Medical

- ☐ Yes, our plan includes the option to cover different-sex spouses and same-sex spouses/partners
- ☐ No, our plan only allows employees to cover a different-sex spouse
- ☐ No, our plan does not cover either different-sex or same-sex spouses/partner — OR — benefit not offered to anyone

Dental

- ☐ Yes, our plan includes the option to cover different-sex spouses and same-sex spouses/partners
- ☐ No, our plan only allows employees to cover a different-sex spouse
- ☐ No, our plan does not cover either different-sex or same-sex spouses/partner — OR — benefit not offered to anyone

Dependent coverage

This question is in regards to whether your organization offers dependent coverage for health and dental benefits. For LGBT families, it is often unclear whether an employer will offer coverage to the dependents of both partners/spouses in a same-sex relationship as they would for the dependents of both partners/spouses in different-sex relationship.

- ☐ Yes, our plan includes the option to cover different-sex spouses and same-sex spouses/partners
- ☐ No, our plan only allows employees to cover a different-sex spouse
- ☐ No, our plan does not cover either different-sex or same-sex spouses/partner – OR – benefit not offered to anyone

Shiva/Bereavement leave

This question is in regards to whether your organization provides employees with shiva/ bereavement leave for a death in their family. Specifically, it asks if such leave is allowed in the event of the death of a same-sex partner or a member of the partner's family.

- ☐ Yes, our plan includes the option to cover different-sex spouses and same-sex spouses/partners
- ☐ No, our plan only allows employees to cover a different-sex spouse
- ☐ No, our plan does not cover either different-sex or same-sex spouses/partner – OR – benefit not offered to anyone

Employer-provided supplemental life insurance

- ☐ Yes, our plan includes the option to cover different-sex spouses and same-sex spouses/partners
- ☐ No, our plan only allows employees to cover a different-sex spouse
- ☐ No, our plan does not cover either different-sex or same-sex spouses/partner – OR – benefit not offered to anyone

Relocation/travel assistance

- ☐ Yes, our plan includes the option to cover different-sex spouses and same-sex spouses/partners
- ☐ No, our plan only allows employees to cover a different-sex spouse
- ☐ No, our plan does not cover either different-sex or same-sex spouses/partner – OR – benefit not offered to anyone

Adoption assistance benefit

- ☐ Yes, our plan includes the option to cover different-sex spouses and same-sex spouses/partners
- ☐ No, our plan only allows employees to cover a different-sex spouse
- ☐ No, our plan does not cover either different-sex or same-sex spouses/partner – OR – benefit not offered to anyone

401K Hardship distribution option

The Pension Protection Act of 2006 made it possible for employers to extend this benefit to any beneficiary the employee names on the plan, which can include same-sex partners and spouses. This benefit is optional for employers, but if it is available to different-sex spouses it should also be made available to same-sex partners and spouses.

- ☐ Yes, our plan includes the option to cover different-sex spouses and same-sex spouses/partners
- ☐ No, our plan only allows employees to cover a different-sex spouse
- ☐ No, our plan does not cover either different-sex or same-sex spouses/partner – OR – benefit not offered to anyone

Defined benefit plan: Qualified joint and survivor annuity (QJSA)

If your organization has a defined benefit plan (these are increasingly less common), federal law requires it to provide a QJSA for different-sex spouses. It is possible to provide a QJSA for same-sex partners and spouses.

- ☐ Yes, our plan includes the option to cover different-sex spouses and same-sex spouses/partners
- ☐ No, our plan only allows employees to cover a different-sex spouse
- ☐ No, our plan does not cover either different-sex or same-sex spouses/partner – OR – benefit not offered to anyone

Defined benefit plan: Qualified pre-retirement survivor annuity (QPSA)

If your organization has a defined benefit plan (these are increasingly less common), federal law requires it to provide a QPSA for different-sex spouses. It is possible to provide a QPSA for same-sex partners and spouses.

- ☐ Yes, our plan includes the option to cover different-sex spouses and same-sex spouses/partners
- ☐ No, our plan only allows employees to cover a different-sex spouse
- ☐ No, our plan does not cover either different-sex or same-sex spouses/partner – OR – benefit not offered to anyone

COBRA/COBRA-equivalent benefits

COBRA-equivalent benefits can be provided to an employee's spouse, domestic partner and dependent children in order to temporarily continue health coverage at group rates due to certain specific events. COBRA benefits are federally mandated for different-sex spouses at larger organizations, but COBRA-equivalent benefits may be extended to partners.

- ☐ Yes, our plan includes the option to cover different-sex spouses and same-sex spouses/partners
- ☐ No, our plan only allows employees to cover a different-sex spouse
- ☐ No, our plan does not cover either different-sex or same-sex spouses/partner – OR – benefit not offered to anyone



FMLA/FMLA-equivalent benefits

FMLA-equivalent leave can be provided to an employee in order to care for a same-sex spouse, partner or a spouse/partner's dependents. FMLA benefits are federally mandated for different-sex spouses at larger organizations, but FMLA-equivalent benefits may be extended to partners.

- ☐ Yes, our plan includes the option to cover different-sex spouses and same-sex spouses/partners
- ☐ No, our plan only allows employees to cover a different-sex spouse
- ☐ No, our plan does not cover either different-sex or same-sex spouses/partner – OR – benefit not offered to anyone

1b. If YES to Q1, does this location allow employees to certify that their partner qualifies as a dependent for federal income tax purposes?

Problem area: Many employers incorrectly impute their contributions towards partner health insurance as income to all employees enrolled in partner benefits. Both employers and employees generally must pay taxes on imputed income for partner health insurance. However, partners that are qualifying dependents do not require imputed income, and any health coverage premiums paid by the employee may be deducted on a pre-tax basis.

Finding the Right Answer: Your payroll manager would know if this is the case. Ask if a form is available for employees to certify that their partner qualifies as a dependent. Ideally, this form would also be referenced in the enrollment information for partner benefits.

- ☐ Yes
- ☐ No
- ☐ No, but our organization is interested in learning more

2. Please provide any additional information for this location's LGBT-inclusive benefits, including information about specific efforts, successes or challenges.

Information provided here will not affect your rating.

11. Transgender Inclusion

* Required

1.* Has this location modified its employee health insurance contract to remove exclusions for medically necessary treatment for transgender individuals?

Transgender: The term "transgender" refers to a broad range of people who experience and/or express their gender differently from what most people expect. This may mean expressing a gender that does not match the sex listed on their original birth certificate, or physically changing their sex in a process called "transitioning." "Transgender" is an umbrella term encompassing people who are transsexual, cross-dressers or otherwise gender non-conforming.

Healthcare Discrimination: Many insurance carriers (and some providers) regard transgender status as a barrier to care. When a transition is in process, it may involve one or more types of medically necessary treatments. Most of these treatments are typically covered for other medical diagnoses, but many health insurance policies specifically exclude sex affirmation/ sex-reassignment-related treatments.

In order to allow transgender individuals to access necessary medical care, some organizations have worked with their insurance provider to remove exclusionary language.

- ☐ Yes
- ☐ No
- ☐ No, our request for modification was turned down by our provider
- ☐ No, but our organization is interested in learning more
- ☐ Not applicable

2.* Does this location change a transitioning employee's name and gender in all personnel and administrative records to match the employee's preferred gender and name?

- ☐ Yes
- ☐ Have not been approached, but would if asked
- ☐ No
- ☐ No, but our organization is interested in learning more
- ☐ Not applicable

3.* Does this location allow new hires to designate their gender on workplace documents, irrespective of their legal gender identity listed on government documents?

Due to legal complications, it may take an individual multiple years to change his or her legal gender.

- ☐ Yes
- ☐ Have not been approached, but would if asked
- ☐ No
- ☐ No, but our organization is interested in learning more
- ☐ Not applicable

4.* Does this location allow an individual to dress in a manner that correlates with his or her full-time gender presentation?

Full Time Gender Presentation: Gender Presentation is the gender that one presents to the world, expressing one's internal sense of gender identity, which may or may not correlate with one's anatomical sex. Full time presentation means living permanently in the gender with which one truly identifies. For transgender people who embark on the transition process, full time presentation is a major step toward happiness, health and self-actualization.

Since clothing is a central means of presenting gender, it is important to allow individuals to dress in a manner that correlates with their full-time gender presentation.

- ☐ Yes
- ☐ Have not been approached, but would if asked
- ☐ No
- ☐ No, but our organization is interested in learning more
- ☐ Not applicable

5.* Does this location allow an employee to use the gender-specific bathroom that correlates with his or her full-time gender presentation?

For example, if an employee who was assigned female at birth is currently presenting full-time as a man, is he permitted to use the men's bathroom?

- ☐ Yes
- ☐ Have not been approached, but would if asked
- ☐ No
- ☐ No, but our organization is interested in learning more
- ☐ Not applicable

6. Please provide any additional information for this location's efforts towards transgender inclusion, including information about specific efforts, successes or challenges.

Information provided here will not affect your rating.

12. Additional Comments

* Required

1. Please provide any additional comments, thoughts or questions that were brought up by filling out the questions in this survey. This is optional, but we appreciate your feedback.

This could include information on innovative business practices, products or services that affect the LGBT community; notable employee programs; etc.

2. If you have any additional information or supporting documents you would like to submit, please attach the file here.



LGBT Programming in Jewish Organizations

One effective way for organizations to encourage the involvement of LGBT Jews who otherwise might not feel welcome in Jewish organizations, is to provide some LGBT-specific programming and inclusive general programming. Forty-nine percent of organizations in the JOEI indicated that they did so. Inclusive programming can help increase the membership base of an organization, provide a good starting point for discussions about LGBT issues and diversify and help LGBT Jews cultivate their Jewish identity.

The following is a list of programs that organizations in the JOEI survey have hosted recently:

- **Relationship counseling and group counseling that is inclusive of LGBT couples and individuals at social service agencies**
- **LGBT-themed Hanukkah candle lighting, Purim festivals and Passover Seders**
 - University of Washington Hillel hosts an annual Gay Ol' Purim Party, framing it around the idea of the original "coming out" story.
 - Moishe House New Orleans hosted an LGBT Pride Shabbat partnered with The Jewish Newcomer's Program and Ayla, an LGBT Jewish group in New Orleans.
- **Class for engaged couples about Jewish weddings (explicitly open and welcoming to both same-sex and interfaith couples) at religious institutions and JCCs**
- **Meeting groups within their organization for LGBT Jews. Several organizations have groups that are tailored to LGBT Jews:**
 - The Washington, D.C., JCC has a multidimensional LGBT group (GLOE – the Kurlander Program for GLBT Outreach & Engagement) that hosts events and provides programming and training to the JCC.
 - The JCC in Manhattan is another organization with an active LGBT group, with groups and programming meant to serve all parts of the LGBT Jewish community.
 - Many Hillels also have some form of Jewish LGBT group. Some examples include:
 - » Rutgers University Hillel
 - » University of Florida Hillel
 - » University of Pennsylvania Hillel
 - » University of Washington Hillel
- **Panel discussions to start conversations about social justice and issues that affect the LGBT community. Often current members or staff can serve as a resource for participating or developing the panels. Past discussions that organizations have hosted include:**
 - Bullying in schools
 - Transgender issues
 - Same-sex marriage recognition
 - Conversations with parents and grandparents of LGBT adults
 - History of the LGBT equal rights movement



- **Specific programming for elderly LGBT Jews, especially those living alone or in nursing homes**
 - The Jewish Family Service of Colorado offers the GLBT Senior Services Program, which provides services to handle the special needs of the elderly GLBT community.
- **LGBT Jewish speakers such as LGBT Jewish politicians or religious leaders**
- **Same-sex situations included in youth programs about empowerment, healthy dating and leaving abusive relationships**
 - Having anti-bullying programs for youths that include discussions of sexual orientation, gender identity and gender stereotyping.
- **Pride festival participation. This is often a no-cost endeavor that increases an organization's visibility within the LGBT community and builds its reputation as a diverse and welcoming institution.**
 - The Union for Reform Judaism Camp Newman sponsors an event for its 11th grade campers to evaluate what pride means to them, followed by a trip to the annual San Francisco Pride Festival.
 - The Jewish Family and Children's Service of Minneapolis began organizing a Jewish booth at the annual Twin Cities Pride Festival.

Other ideas for Jewish LGBT programming include:

- **A "movie night" followed by a facilitated discussion. Organizations have shown the following movies:**
 - *Trembling Before God*—a documentary featuring the stories of several Orthodox and Hasidic Jews struggling with their sexuality. The film shows a variety of situations, including a Hasidic lesbian in a marriage to a man, a gay man who is no longer religious, and the gay son of a rabbi.
 - *Hineini: Coming Out in a Jewish High School*—a short documentary about a high school student who tries to start a Gay-Straight Alliance in her Jewish Day School.
 - *Eyes Wide Open*—a movie about an Orthodox father who works as a butcher and falls in love with a man who works for him.
 - *Yossi and Jagger*—the story of two Israeli soldiers who are in a secret relationship.
 - *And Thou Shalt Love*—a short movie about a religious gay man in the Israeli Defense Force struggling with reconciling his religion and his love for his best friend.
 - *Keep Not Silent*—a documentary about three Orthodox lesbians living in Jerusalem.
- **Jewish events with an LGBT-related theme, such as:**
 - An LGBT Passover Seder or Shabbat Service—expanding the subject of a Seder to discuss oppression is a good way to include LGBT Jews and can also serve to get people talking about other social justice issues and how they can help.
 - A Torah study session relating to same-sex relationships or transgender issues could be an interesting way of incorporating Jewish traditions and various social justice issues while encouraging dialogue among participants.
 - Discussion of same-sex adoption, interfaith parenting and raising Jewish children. Interfaith parenting is much more common among LGBT Jews than their straight counterparts; only 11% of LGBT Jews are married to another Jew.¹¹ A discussion on this subject might help LGBT Jews navigate an interfaith relationship and remove some of the stigma (both real and imagined) that they face as both LGBT and interfaith.



A number of organizations are available for LGBT Jews in the United States.

These groups host events nationally or locally, provide resources for LGBT Jews and Jewish leadership and/or offer online support for Jews.

This variety of organization and programming ensures that there are resources available for all LGBT Jews in the United States, regardless of age or location.

This is not an all-inclusive list. Additional resources can be found through these organizations.

Keshet

www.keshetonline.org

Keshet is a national organization that works for the full equality and inclusion of lesbian, gay, bisexual, and transgender Jews in Jewish life with headquarters in Boston and local offices in Denver, Colorado and the San Francisco Bay Area. Led and supported by LGBT Jews and straight allies, Keshet cultivates the spirit and practice of inclusion in all parts of the Jewish community – synagogues, Hebrew schools, day schools, youth movements, summer camps, social service organizations, and other communal agencies. Nationwide, Keshet offers training, consultation, and educational resources with a focus on institutions that serve youth and young adults. Keshet's signature train-the-trainer institutes give educators and community leaders the skills and tools they need to train their peers in fostering safe, inclusive classrooms, youth groups, summer camps, and more. In Massachusetts, Colorado, and the San Francisco Bay Area, Keshet also offers social and cultural programs for LGBT Jews, family, friends, and allies.

Hebrew Union College Institute for Judaism and Sexual Orientation (HUC-IJSO)

www.huc.edu/ijso

Located in Los Angeles, Calif., this organization's mission is to prepare Jewish leaders to include every Jew in their congregations and communities. They have a list of events that they are hosting on their websites, such as lectures on the intersection of Judaism and LGBT issues. Their website also includes the Jeff Herman Virtual Resource Center, with a large collection of articles, texts, and websites about LGBT topics.

The Rainbow Center: Jewish Family and Career Services

www.therainbowcenter.org

The Rainbow Center in Atlanta, Ga., provides resources for LGBT Jews of all ages and religious preferences, including education, training, youth services and suicide prevention. They refer people to the LGBT-friendly counseling services, agencies, and clubs that can meet their needs. Their "Ask a Rabbi" feature of the website allows anybody to ask questions anonymously about being LGBT and Jewish.

Nehirim

www.nehirim.org

Nehirim is a national community of LGBT Jews and their allies, which offers programs and services to promote a more inclusive Jewish community. Their programs include retreats and speakers, and their resources include articles related to LGBT Jews and information for college students. Their retreats are varied, and combine LGBT programs and Jewish information.

Eshel

www.eshelononline.org

This organization provides a support network for LGBT Jews of traditional Jewish communities. They host Shabbat retreats, run educational initiatives such as speaker training and maintain a large resource database for LGBT issues in the Orthodox community.

TransTorah

www.transtorah.org

TransTorah helps Jewish communities and congregations become fully inclusive for Jews of all genders. They have resources on inclusive rituals and liturgy, as well as educational resources for transgender-inclusive readings of the Torah. They also have sermons and Divrei Torot (Torah commentaries) available online that use Jewish texts to support transgender and genderqueer inclusion. Their educational material is meant for all audiences, and covers issues such as "Trans Etiquette/Respect/Support 101" and others that are meant as study guides for those looking into the issue of Halacha (Jewish religious law) and gender diversity.

The World Congress of GLBT Jews

www.glbtejews.org

The World Congress of GLBT Jews is an international organization that hosts conferences and workshops around the world that address LGBT issues in the Jewish community. They also support over 50 organizations around the world that serve LGBT Jews and aim to foster a sense of community among LGBT Jews worldwide.

Jewish Queer Youth

www.jqyouth.org

This is a resource for LGBT Jews from traditional Conservative, Orthodox, Hasidic, and Ultra-Orthodox backgrounds between the ages of 17 and 30. The site provides support for young LGBT Jews regardless of current religious affiliation and situations. It is not affiliated with any outside group and is sensitive to any privacy concerns that its members might have, especially those who are still in Orthodox or Hasidic communities and who might not be out to their community. The organization hosts monthly meetings in the JCC in Manhattan.

A Wider Bridge

www.awiderbridge.org

A Wider Bridge seeks to inspire Lesbian, Gay, Bisexual and Transgender (LGBT) Jews to deepen their Jewish identity through connection with Israel and to develop stronger connections between the Lesbian, Gay, Bisexual, and Transgender (LGBT) communities in Israel and North America.



Many people find it difficult to discuss sexual orientation or gender identity for fear of offending somebody or saying the wrong thing.

Using the correct terminology can help people be more inclusive and understanding toward LGBT issues.

This glossary gives a brief explanation of the most commonly used terms when discussing sexual orientation and gender identity, and how they can be used correctly.

Bisexual

Bisexual persons are emotionally, romantically, sexually and relationally attracted to both men and women, though not necessarily simultaneously. They may not be equally attracted to both sexes, and the degree of attraction may vary as sexual identity develops over time.

Cross-dresser

A cross-dresser wears the clothing and/or accoutrements, such as makeup and accessories, that are considered by society to correspond to the "opposite sex." Unlike transsexuals, cross-dressers typically do not seek to change their physical characteristics or manner of expression permanently nor do they desire to live full-time as the opposite gender. (Cross-dressers are sometimes called "transvestites," but that term is considered pejorative.)

Employees who cross-dress some of the time may fear that discovery of their cross-dressing, even when on personal time, may lead to discrimination or harassment at work. While cross-dressing off-duty is not related to an employee's job performance, a person who cross-dresses off-duty is still protected by an EEO policy prohibiting discrimination or harassment based on gender identity/gender identity and expression.

Gay

A gay person is a man or a woman who is emotionally, romantically, sexually and relationally attracted to members of the same sex.

Gender expression

Gender expression refers to all of the external characteristics and behaviors that are socially defined as either masculine or feminine, such as dress, grooming, mannerisms, speech patterns and social interactions. Social or cultural norms can vary widely and some characteristics that may be accepted as masculine, feminine or neutral in one culture may not be assessed similarly in another.

Gender identity

The term "gender identity," distinct from the term "sexual orientation," refers to a person's innate, deeply felt psychological identification as male or female, which may or may not correspond to the person's body or designated sex at birth (meaning what sex was originally listed on a person's birth certificate).

Gender identity disorder (GID)/ Gender dysphoria

GID is a psychological diagnosis recognized by the

American Psychiatric Association. This disorder is marked by severe distress and discomfort caused by the conflict between one's gender identity and one's designated sex at birth. Not all transgender people experience gender dysphoria or are diagnosed with GID.

Gender transition

The term "transitioning" refers to the process through which a person modifies his or her physical characteristics and/or manner of gender expression to be consistent with his or her gender identity. This transition may include hormone therapy, sex-reassignment surgery or other components and is generally conducted under medical supervision based on a set of standards developed by medical professionals. The transition process typically includes a one-year "real-life experience" in which the individuals live and present consistently with their gender identity under medical supervision.

Lesbian

A lesbian is a woman who is emotionally, romantically, sexually and relationally attracted to other women.

Sexual orientation

Sexual orientation is the preferred term used when referring to an individual's physical or emotional attraction to the same or opposite gender. "Heterosexual," "bisexual" and "homosexual" are all sexual orientations. A person's sexual orientation is distinct from a person's gender identity and expression.

Transgender

A broad range of people who experience or express their gender differently from what most people expect — either in terms of expressing a gender that does not match the sex listed on their original birth certificate (i.e., designated sex at birth) or physically changing their sex. It is an umbrella term that includes people who are transsexual, cross-dressers or otherwise gender non-conforming. Not all people who consider themselves (or who may be considered by others) as transgender will undergo a gender transition.

Transsexual

An adjective (often applied by the medical profession) to describe individuals who seek to change or who have changed their primary and/or secondary sex characteristics through feminizing or masculinizing medical interventions (hormones and/or surgery), typically accompanied by a permanent change in gender role.



About the Human Rights Campaign Foundation

Through research, education efforts and outreach, the Human Rights Campaign Foundation encourages lesbian, gay, bisexual and transgender Americans to live their lives openly and seek to change the hearts and minds of Americans to the side of equality. The HRC Foundation is a nonprofit, tax exempt 501(c)(3) organization. Programs funded in part or in full through the HRC Foundation include the HRC Coming Out Project, the HRC Family Project, the HRC Diversity Program, the HRC Historically Black Colleges and Universities Outreach Program, the HRC Religion and Faith Program, the HRC Youth and Campus Outreach Program and the HRC Workplace Project – where the JOEI was housed.

JOEI Project Staff

Elizabeth Leibowitz

Project Manager, HRC Jewish Organization Equality Index

Elizabeth Leibowitz joined the HRC Foundation as the Project Manager of the Jewish Organization Equality Index in the summer of 2011. As Project Manager, Leibowitz was responsible for overseeing all elements of the project, which included helping in the creation of the JOEI survey, authoring resource guides for the JOEI website, and working directly with hundreds of Jewish organizations to encourage their participation in the project. Leibowitz brings a passion and a background working within the Jewish LGBT community to the position, hoping to create a space within the Jewish community where all individuals, regardless of their sexual orientation or gender identity, can find a home. Leibowitz holds a bachelor's degree in political science and a minor in Israeli studies from American University in Washington, D.C.

Daryl Herrschaft

Consultant, HRC Jewish Organization Equality Index

Mr. Herrschaft is Principal of Daryl Herrschaft Consulting, LLC, an independent consulting practice focusing on building relationships between employers and non-profits around shared priorities with measurable results. Herrschaft has a proven record of building corporate reputations around strategic diversity and social responsibility goals and has consulted for dozens of Fortune 1000 companies. Mr. Herrschaft spent 13 years at the Human Rights Campaign, most recently as the Director of the Workplace Project, where he led the development of the Corporate Equality Index, an internationally recognized benchmarking system on LGBT diversity and inclusion in the workplace. He is an alumnus of The George Washington University.

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JOEI 2012 was designed by Tony Frye.

Endnotes

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