Frequently asked questions for team members

Wells Fargo’s new self-identification options

Background

Q: What is this effort all about?
A: In accordance with government regulations, we are required to solicit gender and race/ethnicity information from our team members during the hiring process. If this information is not provided by the team member, the manager is required to make a visual identification.

Wells Fargo team members currently have access to a Personal Information page where they can verify their race/ethnicity and gender. In addition, they can provide information, such as an alternate name (for example, Bill versus William) and cell phone number, and identify if they are a veteran or if they have a disability.

As part of our continuing efforts to be inclusive, we expanded our current data collection process to provide team members additional options for self-identification. In 2011, the ability for team members to voluntarily self-identify sexual orientation (lesbian, gay, bisexual, and heterosexual) and gender identity (transgender) was added, and options to self-identify veteran status were expanded to include other military service not currently defined by federal definitions.

We are conducting an overall communication campaign to increase team member awareness, communicate enhancements, and enable team members to make an informed decision about their opportunity to self-identify the data elements below:

- Contact information
- Gender
- Race/ethnicity
- Veteran status
- Disability status
- Sexual orientation
- Gender identity
- Tobacco usage
- Language capability

Q: What is the business case for this project?
A: Wells Fargo seeks to increase team member awareness and promote an inclusive environment through education and communication of the team member self-identification process.

This project:

- Facilitates metrics and analysis of employee demographics for improved strategic business decisions, diversity programs, recruitment, and retention.
- Maintains consistency with Wells Fargo’s Vision & Values and nondiscrimination statement.
- Improves the accuracy and completeness of team member demographic self-identification through employee awareness and correct status choices, which will result in improved data validity in Wells Fargo’s HR system of record, PeopleSoft.
- Enables enhancement of enterprise diversity reporting and analytics of team member demographic information via the Diversity Analytics Reporting Tool (DART) by expanding the definition of “diverse team members” to include veteran, disability, and lesbian, gay, bisexual, and transgender (LGBT) statuses, in addition to gender and race/ethnicity which are currently reported.
- Allows us to use the same process to identify team member eligibility to attend the various Diverse Leaders Programs, including the LGBT Leaders Program. For more information about the company’s Diverse Leaders Programs, contact Nicole Haydon.

Team member concerns

Q: Where will this information be stored, and who will have access?
A: The information will be stored on Wells Fargo’s HR system of record, PeopleSoft, and will be treated as confidential data. After initial identification, only the team member can initiate an update or change to his or her individual information and self-identification statuses.

Only certain members of the HR community with specialized access will be able to view and use this confidential information for diversity, development, and metric related business purposes.
Managers will not have access to disability, sexual orientation, or gender identity information even via Staff Management. However, Human Resources may share some of this information with managers to support Wells Fargo development programs, for example, to complete the selection process for our Diverse Leaders Programs.

**Q: How will this information be used?**

**A:** Ultimately, personal demographic information will be used to better understand the makeup of our team member population and ensure the company is implementing appropriate diversity and inclusion programs.

Currently, race/ethnicity, gender, veteran, and disability information is being captured to comply with our regulatory obligations.

Race/ethnicity information is being used to identify team members who may qualify to attend the company’s various Diverse Leaders Programs. For more information about the company’s Diverse Leaders Program, contact Nicole Haydon.

Veteran and disability status information is used to identify team members eligible for the company’s Annual Veteran and Disabled Team Member Outreach Program. The company also expanded our Diverse Leaders Program to include an LGBT Leaders Program. The sexual orientation and gender identity information allows us to use the same process to identify team members who may qualify to attend this new program.

Aggregate demographic information (total numbers but no associated names) will be included in the quarterly Diversity Analytics Reporting Tool (DART) reports which are distributed to line-of-business (LOB) senior leaders and their senior Human Resources leaders.

Currently, Wells Fargo’s reporting capability is limited to gender and race/ethnicity. The enhancements enable reporting of additional diverse segments of veteran, disability, sexual orientation, and gender identity status.

Today, with few exceptions, DART reports are created only for Operating Committee members and their direct reports. In the future, we may make DART reports available more broadly across the enterprise. In that case, DART reports will be limited to work groups with at least 100 active team members.

Demographic data may also be used to obtain data cuts for the annual Team Member Connection Survey.

**Q: Are team members required to self-identify?**

**A:** Federal regulations require Wells Fargo to solicit and report gender and race/ethnicity information for team members at the time of hire. Team members have the ability to update their race and gender designation after they are hired. (Team members can update their race and gender once via the Personal Information page. Additional updates require a call to the HR Service Center.)

Wells Fargo is also required by government regulations to solicit and report information on a team member’s veteran and disability status. Providing this information is strictly optional, and team members can choose to self-identify and change a self-identification selection at any time during their employment via their Personal Information page.

Sexual orientation and gender identity self-identification are also voluntary, and team members can choose to self-identify or change a self-identification selection at any time during their employment.

Completion of this information is optional, so you may choose not to provide it.

**System questions**

**Q: What is the difference between your Personal Information page and your Teamworks Profile?**

**A:** Your **Personal Information** page is where you can verify and update important personal and work information, such as alternate name, home or cell phone number, emergency contacts, email address, and MAC. Only you have the ability to update your individual information via the Personal Information page. You can access your Personal Information page from the Accounts section of the home page of Teamworks.

Your **Teamworks Profile** is where you can add professional information about yourself, such as your photo, education and schools, professional associations, Team Member Network affiliation, and Wells Fargo Volunteers chapter memberships. This information can be viewed by anyone within the company who completes a Profiles search on Teamworks. You can access this page by clicking on the **My Profile** link at the top of the home page of Teamworks. Your self-identification choices will not be displayed on your Teamworks Profile.
Specific questions and concerns

Q: What is included in the expanded veteran self-ID options?
A: The new option is “Veteran, any other type.” This Wells Fargo designation is for veterans that cannot identify in one or more of the existing government-provided and recognized veterans statuses:

**Veteran, any other type** – A veteran who has served honorably in the U.S. Armed Forces (including National Guard and Reserves, regardless of activation status) and does not identify as being one or more of the veteran designations listed below. (Do not check if other boxes apply.)

The current government-provided designations for federal reporting are:

**Disabled veteran** – A veteran who is entitled to compensation (or, except for the receipt of military retired pay, would be entitled to compensation) under laws administered by the Secretary of Veterans Affairs or a person who was discharged or released from active duty because of a service-connected disability.

**Vietnam-era veteran** – A veteran who has served on active duty for more than 180 days, any part of which occurred between August 5, 1964, and May 7, 1975, and was discharged (other than a dishonorable discharge) or released; was discharged or released from active duty for a service-connected disability if any part of such active duty was performed between August 5, 1964, and May 7, 1975; or served on active duty for more than 180 days and served in the Republic of Vietnam between February 28, 1961, and May 7, 1975.

**Armed Forces Service Medal** – A veteran who, while serving on active duty in the U.S. military, ground, naval, or air service, participated in a United States military operation for which an Armed Forces Service Medal was awarded pursuant to Executive Order 12985.

**Other covered veteran** – A veteran who served on active duty during a war or in a campaign or expedition for which a campaign badge has been authorized. (Note that for a member of the National Guard and Reserves, active duty for training does not meet this category’s definition.)

**Recently separated veteran** – A veteran who was discharged (other than dishonorably discharged) from active duty in the armed forces within the last three years.

Q: Is there a self-identification option for the National Guard and Reserves?
A: Yes, team members who served honorably in the U.S. Armed Forces (including National Guard and Reserves regardless of activation status) and do not identify as being one or more of the veteran designations can self-identify using the new “Veteran, any other type” designation. Although this code is not a government-recognized definition of a “veteran,” Wells Fargo created this designation to support our ongoing diversity efforts and more accurately account for domestic team members who have served in the U.S. Armed Forces.

Q: Is there a self-identification option for Cold War and other noncombat veterans?
A: Yes, team members who served honorably in the U.S. Armed Forces (including National Guard and Reserves regardless of activation status) and do not identify as being one or more of the veteran designations can self-identify using the new “Veteran, any other type” designation. Although this code is not a government-recognized definition of a “veteran,” Wells Fargo created this designation to support our ongoing diversity efforts and more accurately account for domestic team members who have served in the U.S. Armed Forces.

Q: Who is eligible to participate in the Annual Veterans and Disabled Team Members Outreach Program?
A: Team members who self-identify as a veteran using any of the definitions, including the new option, “Veteran, any other type,” and team members who self-identify by selecting the disability status option are eligible to participate in the annual Outreach Program. Rosters of self-identified team members are compiled in February of each year, and team members are contacted by their line-of-business representatives with an invitation to participate. Note that the timing for this program may vary by business units, and participation in the program is voluntary.

Q: Why are diverse communities important to Wells Fargo?
A: As a financial services company serving an increasingly diverse customer population, diversity is one of Wells Fargo’s core values and fundamental to our continued success. As such, we strive to build a culture where all 275,000 team members feel accepted and individual differences are respected as part of our broader commitment to diversity.

Q: Why do we want to know the sexual orientation and gender identity of our team members?
A: We have a diverse customer and team member population, and our commitment to diversity is strong and unwavering. Wells Fargo’s approach to this topic is built from our Vision & Values and is reflective of respect for individual differences even though individual team members may have their own viewpoint.

This effort not only aligns with our Vision & Values and nondiscrimination statement, it also facilitates a common way to identify our diverse team members and helps to ensure we...
have the most accurate data to implement appropriate diversity and inclusion programs.

It facilitates a consistent selection process for our Diverse Leaders Program. For more information about the company’s Diverse Leaders Program, contact Nicole Haydon.

Information collected will be used for legitimate diversity or development related business purposes.

Q: What concerns may team members have about self-identifying, and how can we support them?

A: Currently, there is no federal law that consistently protects LGBT individuals from employment discrimination, and state laws vary on the level of protection afforded to LGBT individuals. Because of this, some team members may not feel comfortable providing this information.

Wells Fargo is required by government regulations to solicit and report information on a team member’s veteran and disability status, but disclosure of this information is optional and team members can choose to self-identify or change a self-identification selection at any time during their employment via their Personal Information page.

It is important that team members understand that Wells Fargo does not tolerate discrimination or harassment on the basis of race, color, gender, national origin, religion, age, sexual orientation, gender identity, genetic information, physical or mental disability, pregnancy, marital status, veteran status, or any other status protected by federal, state, and local law.

In addition, this data will be treated as confidential information and Wells Fargo’s policies and Code of Ethics apply to protecting this data including corrective action up to and including termination of employment for the inappropriate use of this information.

Q: What if team members have questions about this project?

A: Team members should contact their managers or the HR Service Center (HRSC) at 1-877-HRWELLS (1-877-479-3557) (TDD/TTY Access: 1-800-988-0161).

Q: Where can I learn more about programs for veterans and disabled team members?

- Veterans’ Team Member Network
- Diverse Abilities Team Member Network
- Accommodations Management
- Annual Veterans and Disabled Team Member Outreach Program

Q: Where can I learn more about LGBT self-identification?

- Out & Equal — http://www.outandequal.org
- PRIDE Team Member Network

Q: Why don’t we ask for religious affiliation?

A: Wells Fargo recognizes that diversity includes faith, an important aspect of life for many team members. While some may understand the term as faith in a higher power, others may view it more as a set of personal values and guiding principles. Our intent is to embrace people from all faith backgrounds as well as those who claim none. It is not our intent to define religion, spirituality, or faith but to leave the meaning open to team members. Hence, we do not intend to collect such data on the Personal Information page.

Q: Why is this effort limited to domestic team members and not global team members?

A: Many companies are already applying this process globally. However, Wells Fargo has decided to limit this process to domestic team members because cultural and legal practices in foreign countries differ from those in the United States.