Corporate Equality Index 2023: Nuts and Bolts

Marcos Garcia
Deputy Director
Workplace Equality Program
He, Him
Marcos Garcia
he/him
Deputy Director
Workplace Equality Program
HOUSEKEEPING

All lines are muted

You can submit questions via Control Panel

You can chat with hosts

Use Zoom’s “Audio Setting” to access audio via your Telephone or your computer’s Speakers.

If at any point you lose connection, e-mail cel@hrc.org
### CEI 2023 Scoring Criteria

**Rating Criteria for the 2023 CEI**

<table>
<thead>
<tr>
<th>Criterion</th>
<th>Points Possible</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Employment Non-Discrimination</strong></td>
<td>5</td>
<td>Businesses must have a non-discrimination policy that includes terms such as “gender identity” and “sexual orientation.”</td>
</tr>
<tr>
<td><strong>2a. Domestic Partner Benefits</strong></td>
<td>20</td>
<td>Businesses must provide benefits for domestic partners.</td>
</tr>
<tr>
<td><strong>2b. Family Formation Benefits</strong></td>
<td>20</td>
<td>Businesses must provide benefits for family formation.</td>
</tr>
<tr>
<td><strong>2c. Transgender Inclusive Health Benefits</strong></td>
<td>20</td>
<td>Businesses must provide health coverage for transgender individuals.</td>
</tr>
<tr>
<td><strong>2d. LGBTQ+ Benefits Guide</strong></td>
<td>5</td>
<td>Businesses must provide a benefits guide for LGBTQ+ employees.</td>
</tr>
</tbody>
</table>

### CEI 2023 Question Requirements Grid

**CEI 2023 Requirements Grid**

Thank you for your interest in the 2023 CEI! We have created our CEI Requirements Grid as a survey completion companion to provide more in-depth information on our criteria and how your business can meet each criterion requirement.

**How to use this guide:**

We strongly recommend printing this grid and the CEI 2023 Scoring Criteria as you complete the CEI 2023 survey. We have found that users utilize the grid as a checklist as they work through the survey and score for each and every topic in the survey. You may also consider using the CEI 2023 Scoring Criteria document that includes an additional column for your business’s notes.

The CEI 2023 Requirements Grid reflects each of the scored criteria in the CEI and provides documentation requirements to assist you in completing the survey. In the left column, we have provided a simplified version of the criteria, in the order we’ve provided the question and question number in the CEI. And in the right column we’ve provided the requested documentation we are looking for when you submit your survey. Please use this before reaching out to our team for questions on whether your initiatives meet our criteria.

**General notes about the 2023 CEI Survey Questions:**

- Do I need to answer everything? In a new survey deployment, you will be able to mark all questions as completed or not applicable. If you mark any as completed, we request that you provide documentation. We encourage you to answer all questions to the best of your ability, as these questions are designed to help us better understand your organization's policies and practices.
- How do I see my Score? You may check your final report by logging in at the CEI website and selecting “View My Report” from the menu.
- How do I know if I am scoring correctly? Please refer to the scoring criteria in the CEI survey.
- What is the CEI survey due by? The CEI survey is due by June 2, 2023.

If you have any questions, please reach out to the CEI at cei@nclu.org. We look forward to working with you!
INTRODUCTION

In another time, decades ago, it was a struggle to find a job with no discrimination against LGBTQ+ individuals. Today, the landscape has changed significantly, with many companies embracing diversity and inclusivity. However, despite progress, challenges remain, particularly for LGBTQ+ employees who may still face discrimination in the workplace.

The National Scorecard for LGBTQ+ Equality is a tool designed to help organizations measure their progress in creating a more inclusive workplace. This scorecard provides insights into areas such as policies, benefits, and culture, helping companies identify areas for improvement and track their progress over time.

The definition of workplace diversity has expanded to encompass not only LGBTQ+ employees but also other marginalized groups. The goal is to create a workplace that is inclusive, equitable, and supportive of all employees, regardless of their identity or background.

Employee benefits, such as healthcare, retirement plans, and paid time off, are critical components of a diverse and inclusive workplace. These benefits should be extended to all employees, regardless of their orientation, gender identity, or other characteristics.

In conclusion, the National Scorecard for LGBTQ+ Equality is a valuable tool for organizations committed to creating a more inclusive and equitable workplace. By using this scorecard, companies can identify areas for improvement and work towards creating a more welcoming and diverse environment for all employees.
842
“Best Places to Work for LGBTQ+ Equality”

In the 2022 CEI, 842 employers achieved a top score of 100 and earning the coveted title of “Best Place to Work for LGBTQ+ Equality.”

138
Newly rated companies

138 companies, from nearly every industry, participated in the CEI for the first time this year.

379
Fortune 500 employers actively participated in the 2022 CEI

152
American Law Magazine

200 law firms actively participated in the 2021 CEI

To date, the HRC Foundation has worked with thousands of businesses to promote workplace equality for LGBTQ+ workers.

Have operations in all 50 STATES, employing over 20 MILLION workers

Employ over 39 MILLION workers globally
ADVANCING EQUALITY THROUGH THE CEI

4 Pillars for LGBTQ+ Workplace Inclusion:

• Workforce Protections

• Inclusive Benefits for LGBTQ+ workers and their families

• Supporting an Inclusive Culture

• Corporate Social Responsibility
LGBTQ+ Inclusive Employment Non-Discrimination Policy

Full Credit: 5 points
INCLUSIVE BENEFITS

Domestic Partner Benefits
- Must have equivalency
  Full Credit: 10 points
  Partial Credit: 5 points

Family Formation Benefits
- Must have equivalency
  Full Credit: 10 points
  Partial Credit: 5 points

Transgender Inclusive Health Benefits
  Full Credit: 25 points
  Partial Credit: 10 points

LGBTQ+ Benefits Guide
  Full Credit: 5 points
  No partial credit offering
SUPPORTING AN INCLUSIVE CULTURE

LGBTQ+ Internal Training and Accountability
- at least four elements

Full Credit: 5 points
No partial credit offering

LGBTQ+ Data Collection
- Employee Surveys
- Data Collection
- Board Demographic Data

Full Credit: 5 points
No partial credit offering

Transgender Inclusion Best Practices
- Gender Transition Guidelines
- Restroom, Dress Code or Pronoun Policy

Full Credit: 5 points
No partial credit offering

ERG or Diversity Council

Full Credit: 10 points
No partial credit offering
CORPORATE SOCIAL RESPONSIBILITY

Efforts of Outreach or Engagement to broader LGBTQ+ Community
- at least five efforts

Full Credit: 15 points
Partial Credit: 10 points

LGBTQ+ Corporate Social Responsibility
- Contractor/supplier non-discrimination standards
- Philanthropic Giving Guidelines

Full Credit: 5 points
No partial credit offering
ADVANCING EQUALITY THROUGH THE CEI

4 Pillars for LGBTQ+ Workplace Inclusion:

• Workforce Protections
• Inclusive Benefits for LGBTQ+ workers and their families
• Supporting an Inclusive Culture
• Corporate Social Responsibility
### SAMPLE RESOURCES: SCORING CRITERIA

**Rating Criteria for the 2023 CEI**

<table>
<thead>
<tr>
<th>Criteria 1. Workforce Protections</th>
<th>Points Total</th>
<th>Full Credit:</th>
<th>Partial Credit:</th>
<th>No partial credit offering</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Employment Non-Discrimination</strong></td>
<td>5 Points Total</td>
<td>Full Credit: 5 points</td>
<td>Partial Credit: 3 points (if full benefits are provided to all spouses but not domestic partners)</td>
<td>No partial credit offering</td>
</tr>
<tr>
<td>• Business employment non-discrimination policy must include the terms “sexual orientation” and “gender identity or expression” (or “gender identity”)</td>
<td></td>
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</tr>
<tr>
<td><strong>2. Inclusive Benefits</strong></td>
<td>50 Points Total</td>
<td>Full Credit: 15 points</td>
<td>Partial Credit: 3 points (if benefits are provided to all spouses but not domestic partners)</td>
<td>No partial credit offering</td>
</tr>
<tr>
<td>• Domestic Partner Benefits</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>• Medical benefits must include:</td>
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<tr>
<td>o Health/Medical, Dental, Vision, Dependent Coverage and CORA benefits</td>
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<tr>
<td>• Soft benefits can include:</td>
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<tr>
<td>o Health reimbursement plan, supplemental life insurance, relocation/travel assistance, employee discounts, employee assistance program, OSHA/ADA equivalent benefit, OPEB/CPERS equivalent benefit, cash balance plans, health/disease-related leave, employee assistance programs</td>
<td></td>
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<tr>
<td>• Family Formation Benefits</td>
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<tr>
<td>• Employees must have equivalency in same- and different-sex domestic partner benefits</td>
<td></td>
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<tr>
<td>• Benefits must include:</td>
<td></td>
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<tr>
<td>o Equivalency must be provided for the following services available:</td>
<td></td>
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<tr>
<td>o Adoption assistance</td>
<td></td>
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<tr>
<td>o Child-rearing leave</td>
<td></td>
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<tr>
<td>o Infertility treatment coverage (non-invasive)</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>o Foster care assistance</td>
<td></td>
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<tr>
<td>o In-vitro fertilization</td>
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<tr>
<td>o Surrogacy benefits</td>
<td></td>
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<tr>
<td>o Paid family leave (up to 12 months)</td>
<td></td>
<td></td>
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</tr>
<tr>
<td><strong>3. Transgender-Inclusive Health Benefits</strong></td>
<td>5 Points Total</td>
<td>Full Credit: 5 points</td>
<td>Partial Credit: 3 points (if benefits are provided to all employees but not transgender individuals)</td>
<td>No partial credit offering</td>
</tr>
<tr>
<td>• All transgender individuals must have equal health coverage for all services including but not limited to:</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>o Mental health benefits</td>
<td></td>
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<tr>
<td>o Inpatient services (prescription and non-prescription medications)</td>
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<td></td>
</tr>
<tr>
<td>o Services for medical conditions or services related to gender identity or expression (including reconstructive chest, breast, and genital surgery)</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>• Benefits must include:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>o Number of hours of breast surgery for transgender patients</td>
<td></td>
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</tr>
<tr>
<td>o Benefits for transgender individuals must be provided in a manner consistent with the Affordable Care Act</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>4. Corporate Social Responsibility</strong></td>
<td>20 Points Total</td>
<td>Full Credit: 10 points</td>
<td>Partial Credit: 5 points (if a supplier diversity program is in place but does not include LGBT+ diversity)</td>
<td>No partial credit offering</td>
</tr>
<tr>
<td>• Supplier diversity program must include:</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>o A commitment to diversity and inclusion</td>
<td></td>
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</tr>
<tr>
<td>o Support for LGBT+ employees</td>
<td></td>
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</tr>
<tr>
<td>o Marketing and advertising to LGBT+ consumers</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>• All materials must include:</td>
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<td></td>
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</tr>
<tr>
<td>o Logo or emblem</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>o Text that includes gender identity and sexual orientation (can be in a header, footer, or other prominent location)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>o At least one of the following:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>o The organization must have a supplier diversity program</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>o The organization must have a supplier diversity program and a commitment to diversity and inclusion</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>o The organization must have a supplier diversity program and a commitment to diversity and inclusion and a pledge to support LGBT+ employees</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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**Sample Resources**

**Scoring Criteria**

- [Link to Scoring Criteria](#)
##SAMPLE RESOURCES: SCORING CRITERIA

###3d. Employee Group —OR— Diversity Council

**Businesses must have either of the following:**
- LGBTQ+ Employee Resource Group
- LGBTQ+ Diversity Council

###Rating Criteria for the 2023 CEI

<table>
<thead>
<tr>
<th>Criteria 1: Workforce Protections</th>
<th>5 Points Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Employment Non-Discrimination</td>
<td>Full Credit: 5 points</td>
</tr>
<tr>
<td>- Business' employment non-discrimination policy must include the term “sexual orientation” and “gender identity or expression” (or “gender identity”)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Criteria 2: Inclusive Benefits</th>
<th>50 Points Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2a. Domestic Partner Benefits</td>
<td>Full Credit:</td>
</tr>
<tr>
<td>- Businesses must have equivalent benefits for same- and different-sex domestic partner benefits.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Criteria 3: Transgender Health Benefits</th>
<th>20 Points Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>3a. Transgender-Inclusive Health Benefits</td>
<td>Full Credit: 5 points</td>
</tr>
<tr>
<td>- Businesses must have equal health coverage for transgender individuals without exclusion for medically necessary care:</td>
<td></td>
</tr>
</tbody>
</table>
  - Breast cancer
  - Mental health benefits
  - Pharmaceutical coverage (e.g., hormone replacement therapy)
  - Coverage for medical costs of laboratory services.
  - Coverage for reconstructive surgical procedures related to gender
  - Reassignment (including reconstructive chest, breast, and genital procedures)
  - Short-term medical leave

###4. Corporate Social Responsibility

<table>
<thead>
<tr>
<th>Criteria 4.1: Corporate Social Responsibility</th>
<th>20 Points Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>4. Corporate Social Responsibility for LGBTQ+ Community</td>
<td>Full Credit: 15 points</td>
</tr>
<tr>
<td>- Businesses must demonstrate ongoing LGBTQ+ specific engagement that extends across the includes at least five of the following:</td>
<td></td>
</tr>
</tbody>
</table>
  - LGBTQ+ employee recruitment efforts with demonstrated reach of LGBTQ+ programs
  - Supplier diversity program with demonstrated effort to include certified LGBTQ+ suppliers
  - Marketing or advertising to LGBTQ+ consumers (e.g., advertising with corporate partner, advertising in LGBTQ+ media or sponsoring LGBTQ+ organizations and events)
  - Demonstrated efforts to support LGBTQ+ equality under the law through legal, financial, and/or strategic support
  - Demonstrated public support for LGBTQ+ equality under the law through legal, financial, and/or strategic support | No partial credit offering
SAMPLE RESOURCES: QUESTION REQUIREMENTS GRID

CEI 2023 Requirements Grid

Thank you for your interest in the 2023 CEI! We have created our CEI Requirements Grid to serve as a survey completion companion to provide more in-depth information on our criteria and how your business can meet each criterion requirement.

How to use this guide:

We strongly recommend printing this grid and the CEI 2023 Scoring Criteria as you complete the CEI survey. We have found that users who use the grid as a checklist as they work through the survey and allow for quick and easy tracking of progress in the survey. You may also consider using the CEI CEI Resource Guide—document that includes an additional column for your business notes.

The CEI 2023 Requirements Grid explains each of the scored criteria in the CEI and provides documentation requirements to assist your team in completing the survey. In the left-hand column, we have provided an objective version of the criteria, in the center we have provided the question and question number in the CEI and in the right-hand column we have provided the required documentation we are looking for when you submit your survey. Please use this brochure next to our team for questions on whether initiatives meet our criteria.

General notes about the 2023 CEI Survey Questions:

- Do I need to answer everything? If a question is displayed to you in the CEI survey, it is required to be answered. Unlike in previous years, we request a response to all questions, and you will not be able to finalize the survey without answering all displayed questions.
- How do I see my Score? You must check your facility's score using the Table of Contents left-hand panel (the three-line or "hamburger" menu) and select "Preliminary Scoring." Note: If you see recalculation errors, please note the scored questions in the provided table, return to the section, update your answers, and click through the entire section (including the draft final questions) for the score to recalculate.
- Additional: If your score is considered recalculation, this is only a preliminary score. We will re-review your survey and make sure the scored scores given to your business before the 2023 CEI Report Launch in November 2023.
- How do I know if I have an attachment I've added? In short, you cannot. If you would like to view a file you've attached, we recommend re-uploading the correct document. If you would like to remove a document, we recommend uploading a blank document to overwrite the document you've originally submitted.
- When is the 2023 CEI survey due? The 2023 CEI survey is due on June 2, 2023.
- Are there more FAQs available? Yes! Please visit this page for further information and documentation to help you complete the 2023 CEI.

If you have any questions, please reach out to the CEI at cei@hrc.org. We look forward to working with you!
### SAMPLE RESOURCES: QUESTION REQUIREMENTS GRID

#### CEI 2023 Requirements Grid

Thank you for your interest in the 2023 CEI. We have created our CEI Requirements Grid to serve as a survey completion companion to provide more in-depth information on our criteria and how your business can meet each criterion.

#### Criteria 2. Inclusive Benefits

2a. Domestic Partner Benefits

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#### 3d. Employee Group OR Diversity Council

**Full Credit: 10 points; No partial credit offering**

For more detailed information about this section and specific examples that meet the criteria please see the Employee Group or Diversity Council section of the CEI Resource Guide.

<table>
<thead>
<tr>
<th>Criteria/Best Practice</th>
<th>Question(s) No. &amp; Specific Wording</th>
<th>Validating Information Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Businesses must have either of the following:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LGBTQ+ Employee Resource Group</td>
<td>Q8. Does your business have an officially recognized LGBTQ+ employee group? Attachment point: Q8b</td>
<td>A company must:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Submit documentation of how employees are made aware of the LGBTQ+ ERG. This may be a public site or other internal documentation accessible to all employees.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Indicate they have either an LGBTQ+ employee resource group (ERG) or a diversity council that includes LGBTQ+ issues as a part of its mission/charter.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Provide the group name and email (if applicable)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Provide the name and title of an executive sponsor</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Note: This information will not be made public</td>
</tr>
<tr>
<td>LGBTQ+ Diversity Council</td>
<td>Q9. Does your business have a firm-wide diversity council or working group with a mission that specifically includes LGBTQ+ diversity? Attachment point: Q9b</td>
<td>A company must:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Provide the website or submit the mission statement/charter that includes LGBTQ+ issues as a part of its mission/charter</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Provide the group name and email (if applicable)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Provide the name and title of the executive sponsor</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Note: This information will not be made public</td>
</tr>
</tbody>
</table>
SAMPLE RESOURCES: RESOURCE GUIDE

Corporate Equality Index Resource Guide

Transgender Inclusion Best Practices Scored Questions

Does your business have written gender transition guidelines documenting supportive policy or practice on issues pertinent to a workplace gender transition?

To receive credit for this effort, a company must:

- Upload a copy of their Workplace Gender Transition Guidelines
- To receive credit, guidelines must include at least the following information:
  - Who in the business is charged with helping a transitioning employee manage their workplace transition
  - What a transitioning employee can expect from management
  - What management’s expectations are for staff, transitioning employees, and any existing LGBTQ+ ERGs in facilitating a successful workplace transition
  - What the general procedure is for implementing transition-related workplace changes, such as adjusting personnel and administrative records, as well as a communication plan for coworkers and clients
  - Answers to frequently asked questions about dress codes and restroom use.

More information:

- For more about Workplace Gender Transition Guidelines, check out this resource!

Examples:

- Cornell University’s Gender Affirmation in the Workplace Guide

Workplace Gender Transition Guidelines

Institute protocols for gender transitions that clearly delineate responsibilities and expectations of transitioning employees, their supervisors, colleagues and other staff. Should an employee approach their manager or human resources with the intention to transition, be prepared by having gender transition guidelines on file. These guidelines can be in the form of an informal or formal document that is available to all employees.
Corporate Equality Index Resource Guide

Transgender Inclusion Best Practices Scored Questions

Does your business have written gender transition guidelines documenting supportive policy or practice on issues pertinent to a workplace gender transition?

To receive credit for this effort, a company must:

• Upload a copy of their Workplace Gender Transition Guidelines
• To receive credit, guidelines must include at least the following information:
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  • What a transitioning employee can expect from management
  • What management’s expectations are for staff, transitioning employees, and any existing LGBTQ+ ERGs in facilitating a successful workplace transition
  • What the general procedure is for implementing transition-related workplace changes, such as adjusting personnel and administrative records, as well as a communication plan for coworkers and clients
  • Answers to frequently asked questions about dress codes and restroom use...

More information:

• For more about Workplace Gender Transition Guidelines, check out this resource!

Examples:

• Cornell University’s Gender Affirmation in the Workplace Guide
Inclusive Culture Best Practices
Transgender Inclusion Workplace Best Practices

Q6. Does your business have written gender transition guidelines documenting supportive policy or practice on issues pertinent to a workplace gender transition?
Supportive policy or practice should include guidance on restroom and facilities access, dress code and internal recordkeeping that fully recognize an employee's full-time gender presentation and maximize privacy for the employee. These guidelines must be separate from the medical benefits documentation submitted in the previous section.

**SCORED Q REQUIRED**

*View the CEI Resource Guide to see examples and resources for this question*

**Information on file: No**

- [ ] Yes
- [ ] No
Completing the CEI Survey
LOGGING INTO THE CEI

CEI 2023 Communications

ALL 2023 CEI Surveys are due June 2, 2023.

Technology Requirements: Please use Chrome, Firefox or Safari browsers while completing the CEI 2023. There are known compatibility issues with Internet Explorer/Microsoft Edge and we recommend avoiding these browsers, if possible.

Login to continue to the CEI 2023 Survey for

Username
Password
Login

Current Survey Status: Not Started

Click here for more information about the various survey status types.

Helpful Resources

Links
- CEI 2023 Scoring Criteria
- CEI 2023 Question Requirements Grid
- CEI 2023 Question Requirements Grid Legal Size Paper PDF
- CEI 2023 Question Requirements Grid Legal Size Paper DOCX
- CEI Survey Help Page

Please reach out to us at CEI@HRC.ORG if you need assistance with the CEI 2023.
LOGGING INTO THE CEI

Corporation Equality Index
Rating Workplaces on Equality and Inclusion for LGBTQ+ Employees

CEI 2023 Communications

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- CEI 2023 Question Requirements Grid Legal Size Paper PDF
- CEI 2023 Question Requirements Grid Legal Size Paper DO CX
- CEI Survey Help Page

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LOGGING INTO THE CEI

CORPORATE EQUALITY INDEX
RATING WORKPLACES ON EQUALITY AND INCLUSION FOR LGBTQ+ EMPLOYEES

CEI 2023 Communications

ALL 2023 CEI Surveys are due June 2, 2023.

Technology Requirements: Please use Chrome, Firefox or Safari browsers while completing the CEI 2023. There are known compatibility issues with Internet Explorer/Microsoft Edge and we recommend avoiding these browsers, if possible.

Login to continue to the CEI 2023 Survey for

Username
Password
Login
Forgot Credentials?

Current Survey Status: Not Started
Click here for more information about the various survey status types.

Helpful Resources

Links
- CEI 2023 Scoring Criteria
- CEI 2023 Question Requirements Grid
- CEI 2023 Question Requirements Grid Legal Size Paper PDF
- CEI 2023 Question Requirements Grid Legal Size Paper DOCX
- CEI Survey Help Page

Please reach out to us at CEI@HRC.ORG if you need assistance with the CEI 2023.
LOGGING INTO THE CEI

CORPORATE EQUALITY INDEX
RATING WORKPLACES ON EQUALITY AND INCLUSION FOR LGBTQ+ EMPLOYEES

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LOGGING INTO THE CEI

Survey Status Key

- **Not started** - Survey has not been opened and started.
- **Draft** - Survey has been started, but not submitted.
- **Survey Submitted** - Survey has been completed and submitted to the CEI team for review.
- **Review in Progress** - The CEI team is reviewing the survey and will send the business an email with the preliminary results once the review is complete. This email will be sent to the survey submitter and any contacts listed as "CEI Survey Primary Contact."
- **Preliminary Review Complete** - The CEI team has completed a preliminary review of the survey and sent our review and a preliminary score to the business.
- **Review Complete, Awaiting Updates** - The review of the survey is complete pending the update of specific documents that need to be submitted by the business.
- **Review Complete, Finalized** - The review and 2023 CEI score have been finalized and the business will have received an email with the final results.
LOGGING INTO THE CEI

CORPORATE EQUALITY INDEX
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NAVIGATING THE CEI: WELCOME SCREEN

Welcome

Welcome to the Corporate Equality Index (CEI)—we’re looking forward to working with you!

Before you get started, please take a moment to review our CEI 2023 Scoring Criteria. We also encourage you to review the CEI Resource Guide, our comprehensive instructional and reference accompaniment to the Corporate Equality Index (CEI) Survey. You may also find it helpful to download the 2023 CEI Question Requirements Grid which outlines each scored question, the documentation that is required to be submitted for validation. We hope that you find this useful to help you gather the materials that are necessary to complete the CEI survey. (We’ve also created this document in legal size with a column for you to add details about your company’s work on our questions.)

Our Confidentiality Commitment to You

As part of the Corporate Equality Index (CEI) survey we collect a variety of information from businesses, some of which may be considered confidential in nature. The Human Rights Campaign Foundation limits access to such information to its employees or consultants who are subject to confidentiality obligations. We will not disclose Confidential Information to third parties, unless prior authorization is received from. “Confidential Information” means non-public information submitted by to the Human Rights Campaign Foundation as part of the Corporate Equality Index, including, for example, employee policies, practices and benefits, documentation, diversity and cultural competency training, marketing information, business policies and procedures, internal committee structures and membership and other documents submitted or made available to Human Rights Campaign Foundation in response to the CEI Survey.
NAVIGATING THE CEI: INFORMATION

Important Information for Navigating the Survey

Here is some important information to help you find your way around our survey platform and have the best experience.

Browser Compatibility: This survey platform is optimized for Chrome and Firefox. We highly recommend Chrome or Firefox for the best survey experience. We DO NOT recommend using Internet Explorer or Bing, as there are known compatibility issues.

Visual Cues: Keep an eye out for these images and indicators throughout the survey.

* An asterisk indicates a required, non-scored question (you will primarily find these in the General Organization Information section).

This image indicates that the question is a scored question that is required to achieve a score of 100.

This image indicates that the question is a scored question that is among several in that criteria section that counts towards credit for the section. Please note that some matrix-style questions may contain more than one scored question.

This image indicates that you must provide some additional information or upload a document to validate a scored question.

A plus sign indicates a question that leads to a scored question.

All questions that contain one of the images or indicators above must be answered (or the requested materials must be uploaded) before you are able to submit the survey.
Please note that while multiple people can work on the survey, working on it at the same time from different computers is likely to cause errors and should be avoided.

* 2023 CEI Survey Contributor 1

First Name

Last Name

Title

Email

Phone

* Business Contact Type for Contributor 1 (see descriptions of each type above)

○ CEI Survey Primary Contact

○ CEI 2023 Survey Contributor

We suggest you complete the “General Business Information” section first before entering other parts of the survey. *At the very least, you MUST answer Question 11 in the General Business Information section to gain access to the rest of the survey.*
NAVIGATING THE CEI:
GENERAL BUSINESS INFORMATION

CEI WEP Test Account A

General Business Information

* Q11. Does your business have significant international operations (offices with more than 100 employees)?

PLEASE NOTE: You MUST respond to all of Question 11 before you can access the rest of the survey.

- [ ] Yes
- [x] No
NAVIGATING THE CEI: QUESTIONS

Employment Non-Discrimination/Equal Employment Opportunity Policy

Q1. Does your employment non-discrimination policy (or the Equal Employment Opportunity statement) include the term “sexual orientation” AND the term “gender identity or expression” (or “gender identity”)?

View the CEI Resource Guide to see examples and resources for this question

Information on file: Yes

Please select which term(s) your policy includes:

- Our policy includes BOTH the term ‘sexual orientation’ AND the term ‘gender identity or expression’ (‘gender identity’)
- Our policy ONLY includes the term ‘sexual orientation’
- Our policy ONLY includes the term ‘gender identity or expression’ (‘gender identity’)
- Our policy DOES NOT include either the term ‘sexual orientation’ or the term ‘gender identity or expression’ (‘gender identity’)

Q1a. To receive credit, please attach a copy of your employment non-discrimination policy (or the equal employment opportunity statement).

Please submit a copy of your actual employment non-discrimination or equal employment opportunity statement, not a public employment Non-Discrimination statement. You must provide a copy of the full internal policy code of conduct. We will not accept excerpts or screenshots from the employer website for this question.
NAVIGATING THE CEI: ICONS TO NOTE

Employment Non-Discrimination/Equal Employment Opportunity Policy

Q1. Does your employment non-discrimination policy (or the Equal Employment Opportunity statement) include the term "sexual orientation" AND the term "gender identity or expression" (or "gender identity")?

- Our policy ONLY includes the term "gender identity or expression" (or "gender identity")
- Our policy DOES NOT include either the term "sexual orientation" or the term "gender identity or expression" (or "gender identity")

Q1a. To receive credit, please attach a copy of your employment non-discrimination policy (or the equal employment opportunity statement).

Please submit a copy of your actual employment non-discrimination or equal employment opportunity statement, not a public employment Non-Discrimination statement. You must provide a copy of the full internal policy/code of conduct. We will not accept excerpts or screenshots from the employer website for this question.
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Employment Non-Discrimination/Equal Employment Opportunity Policy

Q1. Does your employment non-discrimination policy (or the Equal Employment Opportunity statement) include the term "sexual orientation" AND the term "gender identity or expression" (or "gender identity")?

Please select which:

- [ ] Our policy includes BOTH the term 'sexual orientation' AND the term 'gender identity or expression' (or 'gender identity')
- [ ] Our policy ONLY includes the term 'sexual orientation'
- [ ] Our policy ONLY includes the term 'gender identity or expression' (or 'gender identity')
- [ ] Our policy DOES NOT include either the term 'sexual orientation' or the term 'gender identity or expression' (or 'gender identity')

Q1a. To receive credit, please attach a copy of your employment non-discrimination policy (or the equal employment opportunity statement).

Please submit a copy of your actual employment non-discrimination or equal employment opportunity statement, not a public employment Non-Discrimination statement. You must provide a copy of the full internal policy/code of conduct. We will not accept excerpts or screenshots from the employer website for this question.
**Navigating the CEI: Icons to Note**

- **Criteria 3 (3a, 3b, 3d): Supporting an Inclusive Culture**
- **Criteria 4 (4a): Corporate Social Responsibility**

<table>
<thead>
<tr>
<th>Criteria 3. Supporting an Inclusive Culture</th>
<th>25 Points Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>3a. LGBTQ+ Internal Training and Accountability</td>
<td>Full Credit: 5 points</td>
</tr>
</tbody>
</table>

Businesses must demonstrate a firm-wide, sustained and accountable commitment to diversity and cultural competency, including at least four of the following elements:

- New hire training clearly states that the nondiscrimination policy includes gender identity and sexual orientation and provides definitions or scenarios illustrating the policy for each.
- Supervisors undergo training that includes gender identity and sexual orientation as discrete topics (may be part of a broader training), and provides definitions or scenarios illustrating the policy for each.
- Integration of gender identity and sexual orientation in professional development, skills-based or other leadership training that includes elements of diversity and/or cultural competency.
- Senior management/executive performance measures include LGBTQ+ diversity metrics.
- Integration of intersectionality in professional development, skills-based, or other training (required for credit).

No partial credit offering.
Navigating the CEI: Attaching Documents

- Drag and drop to attach
- To overwrite: drag and drop another document

There is no way to delete or view your attachment.
NAVIGATING THE CEI: CLOSING A SECTION

Employment Non-Discrimination/Equal Employment Opportunity

Section Conclusion

Please share any feedback, notes, or additional information for HRC on the Non-Discrimination/Equal Employment Opportunity Policy section.

Please attach any additional documents you’d like us to have related to this section.

Are you done answering all the scored required questions and uploading all of the required validation information in the Employment Non-Discrimination/Equal Employment Opportunity section?

Note: Required questions are denoted by one of these images.

Would you like to mark this section as final or keep it in draft?

- [ ] DRAFT - This section is not complete
- [ ] FINAL - This section is complete
## 2023 CEI Preliminary Score for CEI WEP Test Account A

<table>
<thead>
<tr>
<th>Category</th>
<th>Total Possible Points</th>
<th>Your Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Workforce Protections (5 points possible)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• EEO include sexual orientation and gender identity or expression for all operations</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>• Please review Q1 (or Q2 if your business has global operations) of the Workforce Protections section if your score is not tabulating as expected.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workforce Protections Preliminary Total:</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>2) Inclusive Benefits (30 points)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• 2a. Equivalency in spousal and domestic partner benefit</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>• Please review Q1, Q1a, Q2b, Q2d, Q7, Q8, Q9 or Q10 of the Inclusive Spousal and Domestic Partner Benefits section if your score is not tabulating as expected.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• 2b. Family Formation Benefits</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>• Please review Q11 of the Inclusive Spousal and Domestic Partner Benefits section if your score is not tabulating as expected.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• 2c. Transgender-Inclusive Health Care Coverage (per market standard and exclusions removed from all benefits plans)</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>• Please review Q1, Q2, Q3 or Q7 of the Transgender-Inclusive Benefits section if your score is not tabulating as expected.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### 2023 CEI Preliminary Score for CEI WEP Test Account A

<table>
<thead>
<tr>
<th>Workforce Protections (6 points possible)</th>
<th>Total Possible Points</th>
<th>Your Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>EEO include sexual orientation and gender identity or expression for all operations</td>
<td>5</td>
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</tr>
<tr>
<td>Please review Q1 (or Q2 if your business has global operations) of the Workforce Protections section if your score is not tabulating as expected.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Workforce Protections Preliminary Total:** 5

<table>
<thead>
<tr>
<th>Inclusive Benefits (up to 10 points)</th>
<th>Total Possible Points</th>
<th>Your Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>2a. Equivalency in spousal and domestic partner benefit</td>
<td>10</td>
<td>10</td>
</tr>
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<td>Please review Q1, Q1a, Q2b, Q3d, Q7, Q8, Q9 or Q10 of the Inclusive Spousal and Domestic Partner Benefits Section if your score is not tabulating as expected.</td>
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<th>Inclusive Benefits (up to 25 points)</th>
<th>Total Possible Points</th>
<th>Your Score</th>
</tr>
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<tbody>
<tr>
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<tr>
<td>Please review Q1, Q2, Q5 or Q7 of the Transgender-Inclusive Benefits section if your score is not tabulating as expected.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
NAVIGATING THE CEI: RETURNING TO THE SURVEY

Welcome to the CEI

If you are a new user, please enter your contact information in the "Survey Contact Information" section before working on the survey. You can navigate to this section by either clicking the Table of Contents button at the bottom of the page or clicking "Survey Contact Information" from the control panel on the left-hand side of the survey.

If you have already entered your contact information, the survey will now open where the last user on your team left off. Feel free to navigate to the Table of Contents use the control panel on the left-hand side of the survey at any time to move about the survey sections.

Thank you!

Enter Survey
SUBMITTING YOUR SURVEY

Survey Completion Status

Before you can submit your 2023 CEI survey, you must mark every section of the survey as final. To successfully mark a section as final you must make sure that you have responded to every required or scored question that is displayed and upload all of the required validation documentation.

Below is a summary of your survey completion status. If any of the sections are noted as being in DRAFT or are BLANK, you will be unable to submit your survey.

Please use the Table of Contents to navigate back to those sections to complete them. Once all sections are completed you will be able to submit your survey.

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<tr>
<th>Section</th>
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<tbody>
<tr>
<td>General Business Information</td>
<td>DRAFT - This section is not complete</td>
</tr>
<tr>
<td>Criteria 1</td>
<td></td>
</tr>
<tr>
<td>Non-Discrimination/Equal Employment Opportunity Policy</td>
<td>FINAL - This section is complete</td>
</tr>
<tr>
<td>Criteria 2</td>
<td></td>
</tr>
<tr>
<td>Inclusive Spousal and Domestic Partner Benefits</td>
<td></td>
</tr>
<tr>
<td>Transgender-Inclusive Benefits</td>
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</tr>
<tr>
<td>LGBTQ+ Benefits Guide</td>
<td></td>
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<td>Supplemental Information Questions</td>
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2023 CEI Survey - not prepared for submission
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<tr>
<td>Submitter and Contributor Information</td>
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2023 CEI Survey - not prepared for submission
SUBMITTING YOUR SURVEY

2023 CEI Contributors and Official Submitter

Have all survey contributors’ names been captured?

<table>
<thead>
<tr>
<th>Contributor</th>
<th>Name</th>
<th>Email</th>
<th>Contact Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributor</td>
<td>Marcos Garcia</td>
<td><a href="mailto:marcos.garcia@hrc.org">marcos.garcia@hrc.org</a></td>
<td>CEI Survey Primary Contact</td>
</tr>
<tr>
<td>Contributor</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributor</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributor</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please review the contributor information in the table above. Have all of the contributors signed in and are all of the names and email addresses correct? Please double check to make sure that each person’s email is correct.

- Yes, all of our contributors have signed in and the information above is correct
- No, I need to go back to the Contributor section to make some changes

<<PREVIOUS PAGE  SAVE & CONTINUE >>
SUBMITTING YOUR SURVEY

2023 CEI Contributors and Official Submitter

Have all survey contributors' names been captured?

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</tr>
</thead>
<tbody>
<tr>
<td>Contributor 1</td>
<td>Marcos Garcia</td>
<td><a href="mailto:marcos.garcia@hrc.org">marcos.garcia@hrc.org</a></td>
<td>CEI Survey Primary Contact</td>
</tr>
<tr>
<td>Contributor 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributor 3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributor 4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributor 5</td>
<td></td>
<td></td>
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☐ No, I need to go back to the Contributor section to make some changes

Official 2023 CEI Survey Submitter

The CEI Official Submitter is the person at your business who is authorized to review and submit the 2023 CEI survey on behalf of your business. The Official Submitter must be an employee who is vested with the authority to submit responses and supporting documentation on behalf of the business. The official submitter will be asked to attest to the fact that all of the responses submitted to this survey are true, complete, and accurate to the best of their knowledge. The official submitter may not be an intern, fellow, temporary employee, or consultant.

Please note that the Official Submitter may be a working contributor to the survey, but also may be someone who has not actively worked on the 2023 CEI survey and will just be reviewing the information and documentation in the survey and submitting it on behalf of the organization.

Official 2023 CEI Survey Submitter

* First name: Marcos
* Last name: Garcia
SUBMITTING YOUR SURVEY

CEI WEP Test Account A

Survey Completion Status

Your 2023 CEI Survey Submission is ready to submit!

Congratulations! All sections are FINAL and you are clear to submit your survey.

You have two more steps to complete the submission:

STEP 1: Have the 2023 CEI Official Submitter sign below.

STEP 2: CLICK "SUBMIT CEI SURVEY" to complete your submission.

InImportant. Once you click "Save and Continue" below you will NOT be able to re-open your survey. If you would like to review or make changes, use the Table of Contents to navigate to another section. You will not be able to make changes once you move forward from here.

NOTE: You may download a PDF of your submission on the next page.

Survey Affirmation and Submission

I, Marcos Garcia, attest that I have full power and authority to submit responses and supporting documentation on behalf of CEI WEP Test Account A for participation in the 2023 Corporate Equality Index survey administered by the Human Rights Campaign Foundation.

I attest that all of the responses submitted to this survey are true, complete and accurate to the best of my knowledge.

Finally, I attest that CEI WEP Test Account A is familiar with the 2022 Corporate Equality Index Report and online search tool and the level of information published on each participating business rated as part of that report. CEI WEP Test Account A also understands that the Human Rights Campaign Foundation will release the same level of information about it in the 2023 Corporate Equality Index and subsequent reports based on the information submitted in this year’s survey.

Please enter your name below as a digital signature confirming CEI WEP Test Account A’s submission for the 2023 CEI Survey.

SUBMIT CEI SURVEY
HOW TO GET STARTED

• START EARLY!

• Identify your champion(s)

• Form a cross departmental committee

• Get executive buy-in

• Use the CEI scoring criteria as a self evaluation check list

• Start with your foundational policies and the “easy” stuff

• Engage your LGBTQ+ ERGs to learn about needs
CEI NUTS & BOLTS

- CEI 2023 Survey will close on Friday, June 2.
- If the question is presented in your survey, you must respond to the question
- Survey and all resources are free
- Survey does not need to be done in one sitting
Questions?

Email: cei@hrc.org