



HUMAN
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THE LOOK FORWARD



2023 CEI Educational Series

Internal Training and Accountability Efforts & Data Best Practices



Welcome to The Look Forward

Welcome to today's installment of The Look Forward Webinar Series

- Every other Monday at 3pm EST
- 50 Minutes (Including Q&A)

Purpose of this Webinar: Policy – Training – Best Practices

- The Workplace Equality team is bringing you HRC Foundation's new **webinar series** – timely topics to help guide your efforts in your own organizations.
- Engage with diversity & inclusion thought-leaders
- Stay up to date with information relevant to LGBTQ+ workplace equality



Who's this for?

- HR professionals
- D&I professionals
- LGBTQ+ Employee Resource and Affinity Group members
- Executive Sponsors of LGBTQ+ employee groups
- Other stakeholders for workplace inclusion

How to engage...

This is a recorded Presentation followed by Q&A

- Microphones are automatically muted
- Type in your questions via the Q&A function

*Recording and all slides will be shared with
attendees*



FAQs before we get started

- *All slides and resources will be shared with attendees*
- This session is being recorded
- There will be no CEI survey calendar year 2022
- The 2023 CEI survey will open in Spring 2023
 - Employers will have 3 months to complete the survey
- All changes need to be in place by the *submission* deadline in 2023
- Hold questions until we get into the final sections



Today's Agenda

- **Current and New Criteria**
- **Necessary Documentation** (Training Descriptions)
 - New Hire; Supervisor
 - Skills-based/Professional Development; Intersectionality
- **Integration of Intersectionality Into Training**
 - What is intersectionality?
 - Examples
- **Frequently Asked Questions**
- **Open Q&A**



Today's Agenda

PLEASE NOTE:

Today's presentation will be on the changes to the **Internal Best Practices** portion of the CEI criteria.

For a more general overview of the criteria changes:

- Watch our 2023 CEI Informational Webinar
- Check out the 2023 CEI Criteria Toolkit or
- Review the CEI criteria webpage

Current and New Criteria

Internal Best Practices

Current Criteria

Internal Training and Education Best Practices (10)

Businesses must demonstrate a firm-wide, sustained and accountable commitment to diversity and cultural competency, including at least three of the following elements (10)

- 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
- Gender transition guidelines with supportive restroom, dress code and documentation guidance
- Anonymous employee engagement or climate surveys conducted on an annual or biennial basis allow employees the option to identify as LGBTQ+
- Data collection forms include optional questions on sexual orientation and gender identity
- Senior management/executive performance measures include LGBTQ+ diversity metrics options

New Criteria

Internal Training and Accountability Efforts & Data Best Practices (10)

Businesses must demonstrate a firm-wide, sustained and accountable commitment to diversity and cultural competency, including at least four of the following elements. At least one training should include concepts of intersectionality (5)

- 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. *(Note: This can be a part of an existing training or a standalone training.)*

New Criteria

Internal Training and Accountability Efforts & Data Best Practices (10)

Businesses must demonstrate a firm-wide, sustained efforts to measure LGBTQ+ identity with data collection, including at least one of the following elements (5)

- Anonymous employee engagement or climate surveys conducted on an annual or biennial basis that provides employees with the option to identify as LGBTQ+
- Data collection forms that include employee race, ethnicity, gender, military and disability status — typically recorded as part of employee records — include optional questions on sexual orientation and gender identity
- Board (or other governing body) member demographic data collection include the option for individuals to report their sexual orientation and gender identity or selfidentity as LGBTQ+

Necessary Documentation

Training Descriptions



Acceptable Documentation

We will need written descriptions of the trainings you report having.

- New Hire Training
 - Should specifically note if ALL New Hires are required to attend
 - Should describe how the training specifically addresses BOTH sexual orientation and gender identity
- Supervisor Specific Training
 - Should be distinct from New Hire training (Either separate training or separate module)
 - Should note how often Managers/Supervisors are required to complete the course (ex. upon hire/promotion only, annually, bi-annually, etc)

Note: You will also have the option to provide files to provide further context



Acceptable Documentation

We will need written descriptions of the trainings you report having.

- Skills-based or Professional Development Training
 - Should describe how the training specifically addresses LGBTQ+ topics
- Integration of Intersectionality
 - Should provide specific examples of how intersectionality is integrated into the training

Note: You will also have the option to provide files to provide further context

Integration of Intersectionality Into Training



Integration of Intersectionality Into Training

What is intersectionality?

- Intersectionality is a term coined by legal scholar Kimberlé Crenshaw, originally used to describe the specific prejudice faced by Black women in the workplace.
- A frame of analysis for understanding how axes of oppression reinforce each other to create something more complex than the sum of their parts.

Intersectionality is a lens through which you can see where power comes and collides, where it interlocks and intersects. It's not simply that there's a race problem here, a gender problem here, and a class or LGBTQ problem there. Many times that framework erases what happens to people who are subject to all of these things.



Integration of Intersectionality Into Training

How can intersectionality be integrated into trainings?

- These concepts can be introduced in general trainings about non-discrimination, diversity, or inclusion
 - Ex: Information about how gendered expectations can be racialized, such as the assumption that Black women are less feminine or Asian men are less masculine
 - Ex: Explicitly explaining the concept of intersectionality and providing additional context and examples
 - Ex: Scenarios depicting examples of how your policies may apply to experiences of those who are multiply marginalized
- These concepts can also introduced in additional skills based trainings or events
 - Ex: A lunch and learn for HR business partners on applying an intersectional lens to recruitment
 - Ex: A cross-programming event between the Pride and Black Employee ERGs on Black LGBTQ+ experiences.
 - Ex: A guest speaker gives a talk about the two-spirit community for Native American History Month

Frequently Asked Questions



Frequently Asked Questions

Do trainings need to be required or mandatory?

This depends on the type of training. When it comes to new hire and supervisor-specific training, we are asking about the *required* non-discrimination training. The integrated skills-based training or the inclusion of intersectionality does not need to be required, but may be a part of a required or mandatory training.

Can anti-harassment trainings count toward the new hire or supervisor training for credit?

Anti-harassment trainings by themselves cannot count for credit toward the new hire or supervisor training. The trainings submitted for credit should be on non-discrimination alone or non-discrimination *and* harassment *combined*.

Our new hire/supervisor training mentions our policy that includes “sexual orientation” and “gender identity” does this count toward the training credit?

Simply mentioning or reading the text of a non-discrimination policy or having employees sign said policy does not count for credit *by itself*. The training should include definitions or scenarios, or otherwise specifically address sexual orientation and gender identity.



Frequently Asked Questions

We allow employees to self-identify their gender as long as it is male or female. Does this count toward the data collection credit?

No, we can only accept credit for anonymous surveys or HR information systems that allow for employees to share their LGBTQ+ identity generally or sexual orientation *and* gender identity (beyond male and female).

Self-ID is voluntary, is that okay?

Yes, all LGBTQ+ self-ID should be voluntary. We never recommend making these questions mandatory.

Our legal team says that it is illegal to ask about people's sexual orientation or gender identity, can we get an exception?

This is not true. Like other demographic self-ID, LGBTQ+ self-ID should be voluntary. There is no law barring companies from collecting this data voluntarily.

What about senior diversity metrics? Are all executives required to participate in LGBTQ+ diversity efforts?

We are not asking if all senior leaders or executives are required to submit LGBTQ diversity and inclusion metrics, but whether or not LGBTQ metrics are available as an option.

**Unsure about your education,
accountability or data collection
initiatives?**

We're here to help!
Reach out to us at cei@hrc.org!

Q+A

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FAQs before we get started

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Questions?

Please use the Q&A function to ask your questions!



Next Session Details:

**Monday, August 1st
@ 3pm ET**

THANK YOU!



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