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# *THE LOOK FORWARD*



*2023 CEI Educational Series*

# *2023 CEI Tips and Tricks for Success*



# Welcome to The Look Forward

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

- 2023 CEI Educational Series every other Monday
- 50 Minutes (Including Q&A)

## Purpose of this Webinar:

- 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 in 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 during the 2022*** calendar year
- The ***2023 CEI survey will be 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



# Today's Agenda

- **Major Criteria Changes Overview**
- **Resources for Employers**
- **Tips for Success**
  - Start early
  - Identify your working group
  - Schedule time for review
- **Frequently Asked Questions**
- **Open Q&A**





# Today's Agenda

## PLEASE NOTE:

Today's presentation will be on general **Tips and Tricks for Success**

**For an overview of the criteria changes or guidance on specific criteria:**

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



# *Major Criteria Updates*

*New Categories and Expanded Requirements*

# Inclusive Benefits

The most extensive changes to the CEI criteria have to do with family benefits and transition-related benefits

## *Overview of changes to family benefits*

- Spousal benefit no longer scored
- Family formation benefits now scored
- Section is still worth 20 points total
  - 10 for parity in DP bens
  - 10 for parity in family formation
- For more on this, please see the following [past webinars](#)
  - 8/29 (Inclusive Benefits Refresher)
  - 4/25 (The Importance of Inclusive Family Formation Benefits)
  - 4/11 (Spousal and Domestic Partner Benefits)

# Inclusive Benefits

The most extensive changes to the CEI criteria have to do with family benefits and transition-related benefits

## *Overview of changes to transition-related benefits*

- Standard benefits expanded
  - Puberty blockers as a part of pharmaceutical benefit now required
  - REMINDER: Breast augmentation should be a part of standard surgical benefit
- Additional essential services/procedures now scored
  - Hair removal necessary for reconstructive, other hair removal, voice therapy, voice surgery, tracheal shave, lipoplasty/lipofilling, and travel/lodging (at least 5, partial credit available)
- For more on this, please see the following [past webinars](#)
  - 8/29 (Inclusive Benefits Refresher)
  - 5/23 (Transgender-Inclusive Health Care Benefits: Raising the Bar)
  - 5/9 (Transgender-Inclusive Health Care Benefits)

# New Criteria Categories

We have added some completely new requirements including trans inclusion best practices, and an LGBTQ+ benefits guide

*Overview of these new requirements/criteria*

- Transgender inclusion best practices
  - Gender transition guidelines now required
  - Plus one other inclusion BP: inclusive restroom policy, gender neutral dress code, policy/practice for optional pronoun sharing
- LGBTQ+ benefits guide
  - General overview of benefits important to the community (transition care, family formation, HIV/AIDS care)
  - Should also include contact information and information on appeals, where applicable
- For more on this, please see the following [past webinars](#)
  - 9/26 (Transgender Inclusion Best Practices)
  - 8/29 (LGBTQ+ Benefits Guide and Inclusive Benefits Refresher)



# Additional Resources for Employers

[LGBTQ+ Inclusive Benefits FAQs](#)

[LGBTQ+ Benefits Guide Sample Templates](#)

# *Tips and Tricks for Success*



# Tips for Success: Start Early

**You don't need to wait for the survey release or even the full text of the survey to start preparing for next year's submission!**

**Review the criteria changes and compare them to your previous submission and current policies/practices/benefits.**

**Understanding where your company is now in relation to the upcoming criteria changes will help you to avoid unnecessary confusion and delays next year.**

*Once the survey is released (Spring 2023), be sure to start as early as possible. This will allow us enough time to answer any questions you may have or resolve any issues that may arise as you are completing the survey.*





# Tips for Success: Identify Your Working Group

**The CEI survey evaluates several parts of a corporation from benefits and compliance to CSR.**

**Be sure to identify which departments/individuals will need to be involved in the CEI early on in the process.**

**Some things, like benefits documents may take time to obtain, so it is best to reach out to the appropriate stakeholders early on.**

*TIP: Some companies assign particular sections of the survey to the appropriate departments to streamline workflow.*



## Tips for Success: Schedule Time to Chat or Ask for a Review

Our team regularly takes conversations with employers to give them personalized advice on the upcoming criteria changes. You can reach out to [cei@hrc.org](mailto:cei@hrc.org) to schedule a call.

We are also always happy to review documentation, language, policies, etc. You can reach out to us via [cei@hrc.org](mailto:cei@hrc.org) for such reviews. For those unable to share documents, we can review them via screen share on Zoom.

Once the survey starts, we are also always available to review your survey before it is submitted. More information on these pre-submission reviews will be shared after the survey opens.

*TIP: Be sure to read/watch relevant resources ahead of calls or requests for review*



# *Frequently Asked Questions*



# Frequently Asked Questions

## **How will we receive the survey links?**

Links will be sent to the email addresses we have on file for your company when the survey goes live. These emails are sent to the contributors and submitters we have on file from your most recent survey submission or updated contacts that you have shared with us.

## **How long will we have to complete the survey once it opens?**

Companies are always given three months to complete the survey once it opens. Extensions are granted on a case-by-case basis.

## **Once we submit our survey, can changes be made to the submission?**

We reach out to all companies with a “reviewed” score before it is finalized. During this time we may ask for clarification or additional documentation.

# *Questions?*

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



**Next Session Details:**

**Monday, November 7th**

**@ 3pm ET**

**(October 24th CANCELLED)**

***THANK YOU!***



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