



HUMAN
RIGHTS
CAMPAIGN
FOUNDATIONTM

THE LOOK FORWARD



2023 CEI Educational Series



Today's Presenters



Marcos Garcia

he/him
Deputy Director
Workplace Equality Program



Shawnie Hawkins

she/her
Director
Workplace Equality Program



Ani Fête Crews

she/her
Director
Stakeholder Engagement



Welcome to The Look Forward

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

- 2023 CEI Educational Series monthly on Monday at 3pm ET
- 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...

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

This is a recorded presentation

Recording and all slides will be shared with attendees



Today's Agenda

- **2023 CEI Updates**
 - Timeline Review
 - New Resources for CEI Survey Submitters
- **Update from the Workplace Equality Program Director**



CEI 2023 Schedule Review

The ***2023 CEI survey will open on or before March 6, 2023***

- Employers will have 3 months to complete the survey
- All initiatives need to be in place by the submission deadline in 2023.

The 2023 CEI Survey deadline is Friday, June 2, 2023.

The 2023 CEI Report will release in November 2023.



New 2023 CEI Resources

CEI 2023 Scoring Criteria

Rating Criteria for the 2023 CEI

Criteria 1. Workforce Protections	5 Points Total
1. Employment Non-Discrimination <ul style="list-style-type: none">Businesses' employment non-discrimination policy must include the terms "sexual orientation" and "gender identity or expression" (or "gender identity") for all operations	Full Credit: 5 points
Criteria 2. Inclusive Benefits	50 Points Total
To secure full credit for benefits criteria, each benefit must be available to all benefits-eligible U.S. employees. In areas where more than one health insurance plan is available, at least one inclusive plan must be available.	
2a. Domestic Partner Benefits Businesses must have equivalency in same- and different-sex domestic partner benefits <ul style="list-style-type: none">Medical Benefits must include:<ul style="list-style-type: none">Health/Medical, Dental, Vision, Dependent Coverage and COBRA benefitsSoft Benefits can include:<ul style="list-style-type: none">FMLA, Bereavement, supplemental life insurance, relocation/travel assistance, employee discounts, employee assistance program, QJSA/QJSA-equivalent benefit, QPSA/QPSA-equivalent benefit, cash balance plans, hardship distribution option, rollover distribution option	Full Credit: 10 points Partial Credit: 5 points (if soft benefits are provided to all spouses but not domestic partners)
2b. Family Formation Benefits Businesses must have equivalency in spousal and domestic partner family formation benefits regardless of sex <ul style="list-style-type: none">Equivalency must be provided if the following services are available:<ul style="list-style-type: none">Adoption AssistanceCryopreservationInfertility treatment coverage (non-in-vitro)Foster care assistanceIn-vitro fertilizationSurrogacy benefitsPaid family leave (non-FMLA)	Full Credit: 10 points Partial Credit: 5 points (if lack of parity provided in either between spouses and partners OR between different and same-sex spouses)
2c. Transgender Inclusive Health Benefits Businesses must have equal health coverage for transgender individuals without exclusion for medically necessary care <ul style="list-style-type: none">Baseline coverage MUST include the following:<ul style="list-style-type: none">Mental health benefitsPharmaceutical coverage (e.g. hormone replacement therapies)Coverage for medical visits or laboratory servicesCoverage for reconstructive surgical procedures related to genderreassignment (including reconstructive chest, breast, and genital procedures)Short-term medical leave	Full Credit: 25 points Partial Credit: 10 points (if broad exclusions for transgender benefits are not removed from all non-inclusive health plans)
2d. LGBTQ+ Benefits Guide Businesses must provide an LGBTQ+ Benefits Guide for its employees	Full Credit: 5 points No partial credit offering

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 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 2023 CEI survey. We have found that users utilize the grid as a checklist as their working through the survey and allows for quick and easy tracking of progress in the survey. You may also consider using the [legal size paper Requirements Grid](#) 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 leftmost column we have provided a simplified version of the criterion, in the center we've provided the question and question number in the CEI and in the right column we've provided the required 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?** 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 survey sections without answering or providing documentation for all displayed questions.
- How do I see my Score?** You may 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 miscalculations, 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 question) for the score to recalculate.
 - Additionally, if your score is consistently miscalculating, this is only a preliminary score. We will re-review your survey and make sure the correct score is given to your business before the 2023 CEI Report Launch in November 2023.
- How do I view or remove 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!

CEI 2023 Question Requirements Grid

Page 1

CEI 2023 Question Requirements Grid

Page 16

Council
it offering
bles that meet the criteria please see
the HFI Resource Guide
Validating Information Required
A company must:
<ul style="list-style-type: none">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.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.Provide the group name and email (if applicable)Provide the name and title of an executive sponsor
Note: This information will not be made public
A company must:
<ul style="list-style-type: none">Provide the website or submit the mission statement/charter that includes LGBTQ+ issues as a part of its mission/charterProvide the group name and email (if applicable)Provide the name and title of the executive sponsor
Note: This information will not be made public



CEI 2023 Scoring Criteria

Criteria breakdown

Rating Criteria for the 2023 CEI

Criteria 1. Workforce Protections	5 Points Total
1. Employment Non-Discrimination <ul style="list-style-type: none">Businesses' employment non-discrimination policy must include the terms "sexual orientation" and "gender identity or expression" (or "gender identity") for all operations	Full Credit: 5 points

Criteria 2. Inclusive Benefits	50 Points Total
To secure full credit for benefits criteria, each benefit must be available to all full-time, part-time, and contract employees. In areas where more than one health insurance plan is available, at least one inclusive plan must be available.	

2a. Domestic Partner Benefits Businesses must have equivalency: <ul style="list-style-type: none">Medical Benefits must include:<ul style="list-style-type: none">Health/Medical, Dental, vision, life, and disability benefitsSoft Benefits can include:<ul style="list-style-type: none">FMLA, Bereavement assistance, employee assistance, QJSA/QJSA-equivalent balance plans, hardship leave

2b. Family Formation Benefits Businesses must have equivalency benefits regardless of sex: <ul style="list-style-type: none">Equivalency must be provided for:<ul style="list-style-type: none">Adoption AssistanceCryopreservationInfertility treatment coverage (non-in-vitro)Foster care assistanceIn-vitro fertilizationSurrogacy benefitsPaid family leave (non-FMLA)
--

2c. Transgender Inclusive Health Benefits Businesses must have equal health coverage for transgender individuals without exclusion for medically necessary care: <ul style="list-style-type: none">Baseline coverage MUST include the following:<ul style="list-style-type: none">Mental health benefitsPharmaceutical coverage (e.g. hormone replacement therapies)Coverage for medical visits or laboratory servicesCoverage for reconstructive surgical procedures related to gender reassignment (including reconstructive chest, breast, and genital procedures)Short-term medical leave	Partial Credit: 5 points (if lack of parity provided in either between spouses and partners OR between different and same-sex spouses) Full Credit: 25 points Partial Credit: 10 points (if broad exclusions for transgender benefits are not removed from all non-inclusive health plans)
---	--

2d. LGBTQ+ Benefits Guide Businesses must provide an LGBTQ+ Benefits Guide for its employees	Full Credit: 5 points No partial credit offering
--	--

3d. Employee Group –OR– Diversity Council

Businesses must have either of the following:

- LGBTQ+ Employee Resource Group
- LGBTQ+ Diversity Council

Criteria 3. Supporting an Inclusive Culture	25 Points Total
3a. LGBTQ+ Internal Training and Accountability Businesses must demonstrate a firm-wide, sustained and accountable commitment to diversity and cultural competency, including at least four of the following elements: <ul style="list-style-type: none">New hire training clearly states that the nondiscrimination policy includes gender identity and sexual orientation and provides definitions or scenarios illustrating the policy for eachSupervisors 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 eachIntegration of gender identity and sexual orientation in professional development, skills-based or other leadership training that includes elements of diversity and/or cultural competency	Full Credit: 5 points No partial credit offering

3b. Transgender Inclusive Best Practices Businesses must have both of the following transgender inclusive best practices: <ul style="list-style-type: none">Gender transition guidelines with supportive restroom, dress code and documentation guidanceImplementation of the at least one (1) of the following policies or practices:<ul style="list-style-type: none">Trans-inclusive restroom/facilities policyGender-neutral dress codePolicies/procedures that allow for optional sharing of gender pronouns	Full Credit: 5 points No partial credit offering
3d. Employee Group –OR– Diversity Council Businesses must have either of the following: <ul style="list-style-type: none">LGBTQ+ Employee Resource GroupLGBTQ+ Diversity Council	Full Credit: 10 points No partial credit offering

Score Breakdown

Criteria 4. Corporate Social Responsibility	20 Points Total
4a. Efforts of Outreach or Engagement to Broader LGBTQ+ Community Businesses must demonstrate ongoing LGBTQ+ specific engagement that extends across the firm, this includes at least five of the following: <ul style="list-style-type: none">LGBTQ+ employee recruitment efforts with demonstrated reach of LGBTQ+ applicants (required documentation may include a short summary of the event or an estimation of the number of candidates reached)Supplier diversity program with demonstrated effort to include certified LGBTQ+ suppliersMarketing or advertising to LGBTQ+ consumers (e.g.: advertising with LGBTQ+ content, advertising in LGBTQ+ media or sponsoring LGBTQ+ organizations and events)Philanthropic support of at least one LGBTQ+ organization or event (e.g.: local, national, or international)	Full Credit: 15 points Partial Credit: 10 points (if a supplier diversity program is in place but does not include LGBTQ+ diversity)
	Full Credit: 5 points No partial credit offering

Full Credit:
10 points

No partial credit offering

CEI 2023 Question Requirements Grid

Criteria

Specific Question Wording

Required Information for
Validation

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 HEI Resource Guide		
Criteria/Best Practice	Question(s) No. & Specific Wording	Validating Information Required
Businesses must have either of the following:		
LGBTQ+ Employee Resource Group	Q8. Does your business have an officially recognized LGBTQ+ employee group? Attachment point: Q8b	A company must: <ul style="list-style-type: none"> Submit documentation of how employees are made aware of the LGBTQ+ ERG. This may be a public site or other internal documentation accessible to <i>all</i> employees. 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. Provide the group name and email (if applicable) Provide the name and title of an executive sponsor <p>Note: This information will not be made public</p>
LGBTQ+ Diversity Council	Q9. Does your business have a firm-wide diversity council or working group with a mission that specifically includes LGBTQ+ diversity? Attachment point: Q9b	A company must: <ul style="list-style-type: none"> Provide the website or submit the mission statement/charter that includes LGBTQ+ issues as a part of its mission/charter Provide the group name and email (if applicable) Provide the name and title of the executive sponsor <p>Note: This information will not be made public</p>

Thank you for your interest in the 2023 CEI! We have information on our criteria and how your business can meet them.

How to use this guide:

We strongly recommend printing this grid and the [Checklist](#) as their working through the survey and all [Requirements Grid](#) document that includes an additional page.

The CEI 2023 Requirements Grid explains each of the survey. In the leftmost column we have provided a summary and in the right column we've provided the required team for questions on whether your initiatives meet the criteria.

General notes about the 2023 CEI Survey Questions

- Do I need to answer everything?** If a question is marked with an asterisk, you must answer it. If a question is not marked with an asterisk, you will not be graded on it.
- How do I see my Score?** You may check your "Preliminary Scoring." Note, if you see miscellaneous answers, and click through the entire section.
 - Additionally, if your score is consistent, your score is given to your business before the survey ends.
- How do I view or remove an attachment I've submitted?** The correct document. If you would like to remove a document, click on the "Remove" button next to the document.
- When is the 2023 CEI Survey due?** The 2023 CEI Survey is due on **Friday, November 10, 2023 at 11:59 PM EST.**
- Are there more FAQs available?** Yes! [Please click here for more FAQs.](#)

If you have any questions, please reach out to the CEI team at [cei@hrf.org](#)

CEI 2023 Question Requirements Grid

criteria please see
Validating Information Required
current documentation of health insurance eligibility and definitions section(s) that are applicable for benefits. These definitions must include different-sex spouses ("legal spouse" as well as same-sex and different-sex spouses). The health insurance contract must have the same terms for same and different-sex spouses and
tion is required to receive domestic benefits, they must include non-state-issued. These documents are usually affidavits of marriage for personal/business use only.
Partner Benefits must be in place and active at the time of CEI survey
Current health insurance coverage summary or benefits documentation with definitions section(s) that define who is eligible for benefits.
submit smaller, relevant portions of your documents that meet our criteria.

Page 3

CEI 2023 Question Requirements Grid

2c. Transgender Inclusive Health Benefits			
Full Credit: 25 points; Partial Credit: 10 points			
For more detailed information about this section and specific examples that meet the criteria please see the Transgender Inclusive Health Benefits section of the CEI Resource Guide			
Criteria/Best Practice	Question(s) No. & Specific Wording	Validating Information Required	Business Notes
<p>Businesses must provide at least one health plan to all employees that affirmatively and explicitly covers medically necessary health services for transgender people, including gender transition-related treatment.</p> <p>Covered benefits must include:</p> <ul style="list-style-type: none"> • Mental health counseling • Hormone replacement therapy • Routine doctor's visits and lab testing • Surgical procedures • Paid short-term leave (whether employer provided or employer purchased) <p>Note: Baseline surgical procedure coverage must include reconstructive chest/breast and genital surgeries for transmasculine and transfeminine individuals</p>	<p>Q1. Does your business have at least one health insurance plan available to all employees that explicitly affirms coverage for the medically necessary health care services that transgender people may need, including transition-related treatment such as genital surgeries, hormone therapy and mental health counseling?</p> <p>Q2. Are the following health insurance and leave benefits offered to employees and do they cover medically necessary treatment of gender dysphoria?</p> <p>Q5. Is there a cap on transition-related coverage (apart from general lifetime caps)?</p> <p>Q7. Have blanket exclusions for transition-related care been eliminated across all health care plans (i.e. those that do not explicitly affirm coverage for transition-related care)?</p>	<p>Must upload the following:</p> <ol style="list-style-type: none"> 1. Summary Plan Documentation (or Summary Material Modification documentation) 2. Clinical Policy Bulletin (Medical Policy) 3. Explanation of how the benefit is communicated to employees <p>NOTE: Employer must also have removed monetary caps on benefits provided and all broad exclusions to transition-related health care coverage across all plan offerings</p> <p>Partial credit awarded (10 points) if there is <i>at least one</i> inclusive plan available to staff BUT broad exclusions on gender-affirming care have not been removed from all other benefits packages available to staff.</p>	

Legal Size Version also
available for Business
Notes and collaboration

CEI 2023 Resource Guide

< PROFESSIONAL RESOURCES

Corporate Equality Index Resource Guide

The CEI Resource Guide is a comprehensive instructional and reference accompaniment to the Corporate Equality Index survey. The CEI Resource Guide covers all of the sections of the CEI survey in great detail, providing explanations of the practices we ask about are important, example policies, links to outside resources, and more.

Corporate Equality Index Resource Guide

SECTION: **Select One**

The resources provided here are certainly not the only ones available to you. We encourage you to explore other resources and create a workplace that is inclusive of LGBTQ+ employees; here are some suggestions:

Inclusive Culture Best Practices (Criteria 3b through d)

SECTION: **Select One**



LGBTQ+ ERG/Diversity Council Scored Questions

Does your business have an officially recognized LGBTQ+ employee group?

To receive credit in the CEI, a company must:

- Answer "Yes" to indicate the company has an LGBTQ+ employee resource group (ERG)
- Provide the group name and email (if applicable)
- Provide name and title of executive sponsor (Note: This information will not be made public)
- Upload either a screenshot from your intranet describing this group OR an employee brochure or information sheet describing this group.

More information:

- Learn more about [Establishing an Employee Resource Group](#) with our resource.
- Visit our page on [Expanding Your Employee Resource Group](#).

Marcos Garcia (Marcos.Garcia@hrc.org) is signed in

Does your business have a firm-wide diversity council or working group with a mission that specifically includes LGBTQ+ diversity?



**HUMAN
RIGHTS
CAMPAIGN
FOUNDATION**



2023 CEI Additional Information

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

- Check out the Scoring Criteria and Requirements Grid documents
- Review our past criteria webinars

Be on the lookout for an email from cei@hrc.org in the coming week!

Attend our 2023 CEI “Nuts and Bolts” Webinars in the coming weeks.

Start early!

Update from the Workplace Equality Program Director

Evolution of Best Places to Work Distinction

- **Where we started (June 2022):**
 - Move “Best Places to Work” distinction out of CEI 100, to companies that excel in Public Policy & Product/Services
 - Roll out 2023 with CEI
- **Where we are (February 2023):**
 - Rebrand CEI 100
 - New public policy and products/services engagement guidebook/report
 - Roll out Q4 2023 / Q1 2024
 - Future evolution to a new distinction(s)



VOICES ► HRC Demands More From "Best Places to Work for LGBTQ+ Equality"



Via Shutterstock

"Today's employees and customers justifiably have higher expectations for their workplaces and the companies they do business with."

BY JONI MADISON
JUNE 08 2022 8:30 AM EDT

Distinction Evolution Timeline

2022

- **June-September:** “Best Places to Work” announcement, research & discovery
- **October:** Refined, sought additional feedback, socialized w/ key business stakeholders
- **November-December:** Finalize concept

2023

- **January-February:** Communicate plan and operationalize
- **March-July:** Research, solicit examples, conduct interviews
- **August-November:** Writing and review
- **December (*tentative*):** Publication of new report

Corporate Advocacy

Sign-on Letters/Ads	Lobbying (Public & Private)	Peer Organizing	Educate & Mobilize Employees
Social Media	Public Statements	Industry Action	Storytelling/ Marketing

Learn more @
hrc.im/corppublicpolicy



Questions?

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

THANK YOU!



HUMAN
RIGHTS
CAMPAIGN
FOUNDATIONTM