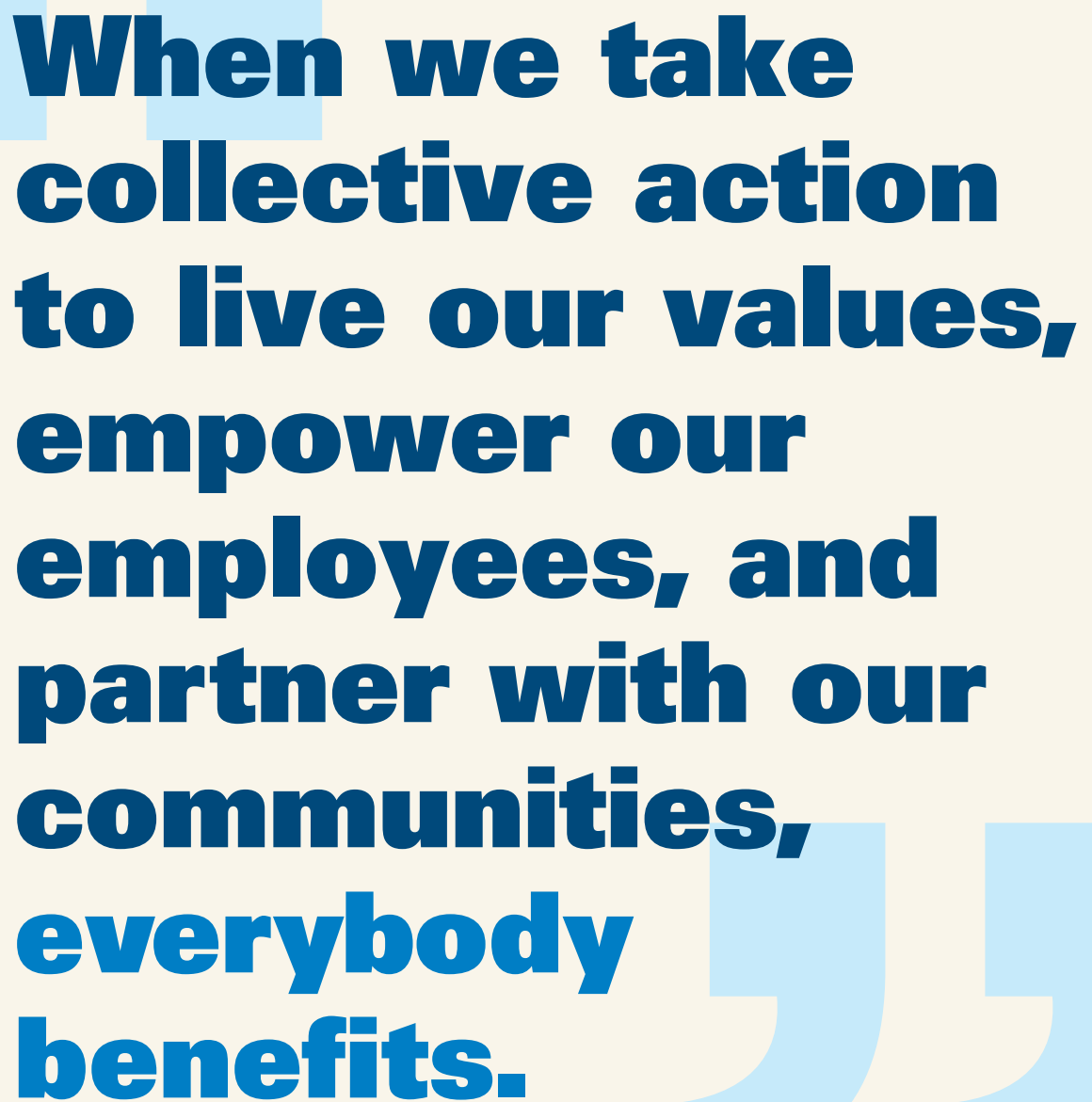


ADVANCING I.D.E.A.

Together

2023

Diversity, Equity and Inclusion Report



**When we take
collective action
to live our values,
empower our
employees, and
partner with our
communities,
everybody
benefits.**

Welcome to our third annual Diversity, Equity and Inclusion (DEI) Report. As you know, everything we do at Excellus BlueCross BlueShield is rooted in our seven core values, one of which is, “We model Inclusion, Diversity, Equity, and Access (I.D.E.A.)” This report continues to be an intentional step toward greater transparency to showcase our efforts in this space.

We are proud to share some of the many ways we continue to empower our employees, partner with our communities, and evolve to meet the changing needs of our people, our industry, and our world – from enhancing internal systems to investing in the community and building momentum through everyday actions.

As a locally based nonprofit health plan, we exist to provide our members with access to high-quality, affordable health care and improve the overall health of the communities we serve. But our responsibilities go deeper than that.

While we continue to push ourselves to be better and do better, we recognize we do not have all the answers. To truly impact systemic,

long-lasting change and create equitable environments that cultivate wellbeing and a sense of belonging, it takes all of us – together.

Year over year, we grow our commitment to I.D.E.A. and continually strive to embed it in all that we do. But we do not do this work alone.

None of this would be possible without our employees, our leaders, our members, and the communities we call home. Thank you for trusting us, challenging us, and working with us.

Because when we take collective action to live our values, empower our employees, and partner with our communities, **everybody benefits.**

With gratitude,



Jim Reed
(he/him)
President & CEO



Sady Alvarado-Fischer
(she/her)
VP, Diversity, Equity &
Inclusion Officer



Together, we commit to employee diversity

As part of our commitment to I.D.E.A., we work to ensure that our workforce is reflective of the members and communities we serve. We continue to make progress and recognize opportunities for growth in the areas of internal mobility, development, and hiring. There is always more to be done.



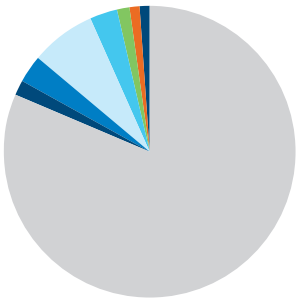
4,480

Total headcount:
Full-time employees

73.15%

Percentage of
female employees

Employee racial/ethnic breakdown



0.54%

American Indian/
Alaskan Native

3.53%

Asian

7.43%

Black/
African American

3.33%

Hispanic/Latino

1.54%

Multiracial/more
than one race

0.04%

Native Hawaiian/
Pacific Islander

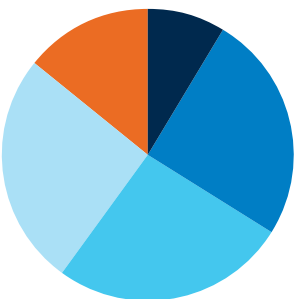
83.46%

White

0.13%

Not specified

Employee age breakdown



34.02%

Under 40

■ 18-29 8.79%

■ 30-39 25.22%

65.71%

40 and over

■ 40-49 25.87%

■ 50-59 25.78%

■ 60+ 14.06%

We commit to an inclusive, equitable, and accessible workplace



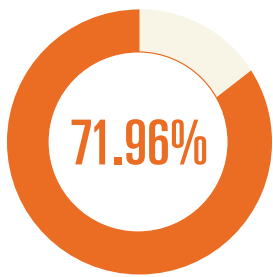
Our Inclusion Survey is one way we measure our progress toward DEI goals. Each year we ask employees to share their experiences on what our company is doing well and where it can improve. **In 2023, 60% of employees took the 2023 Inclusion Survey (up from 42% in 2022!).**

		2023	2022	2021
Agree that we are committed to diversity, equity, inclusion, and access		97%	94%	91%
Agree that senior leadership encourages diversity, equity, and inclusion		92%	91%	90%
Agree that we respect individuals and value their differences		94%	91%	88%
Agree that we are making progress with diversity, equity, and inclusion initiatives		92%	90%	88%
Agree that we do a good job at providing job training programs that promote multicultural understanding		90%	88%	85%
Agree that we provide an environment for free and open expression of ideas, opinions, and beliefs		89%	87%	84%

New questions in 2023

Agree that DEI issues are openly discussed		84%
Agree that I have the same opportunities for advancement as other employees in my organization		84%
Agree that I am comfortable talking about my background and cultural experiences with my colleagues if/when I choose to		86%

Leadership - female representation



% of all
leaders

70.32%

First-Level Management
(Supervisor & Manager)

57.42%

Mid-Level
(Director)

58.57%

Senior-Level
(VP & SVP, Non-Executive)

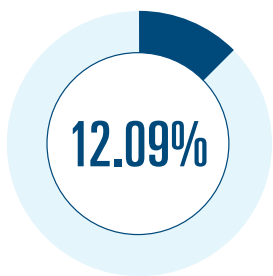
53.84%

Executive
Leadership

33.33%

Board of
Directors

Leaders of color



% of all
leaders

12.15%

First-Level Management
(Supervisor & Manager)

11.96%

Mid-Level
(Director)

8.57%

Senior-Level
(VP & SVP, Non-Executive)

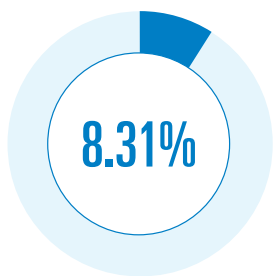
15.38%

Executive
Leadership

26.66%

Board of
Directors

Intersectional representation - female leaders of color



% of all
leaders

8.96%

First-Level Management
(Supervisor & Manager)

6.69%

Mid-Level
(Director)

5.71%

Senior-Level
(VP & SVP, Non-Executive)

15.38%

Executive
Leadership

6.66%

Board of
Directors

New hires (2023)



% of employee population

69.04%

Female

19.14%

Racial/Ethnic Representation (non-white)

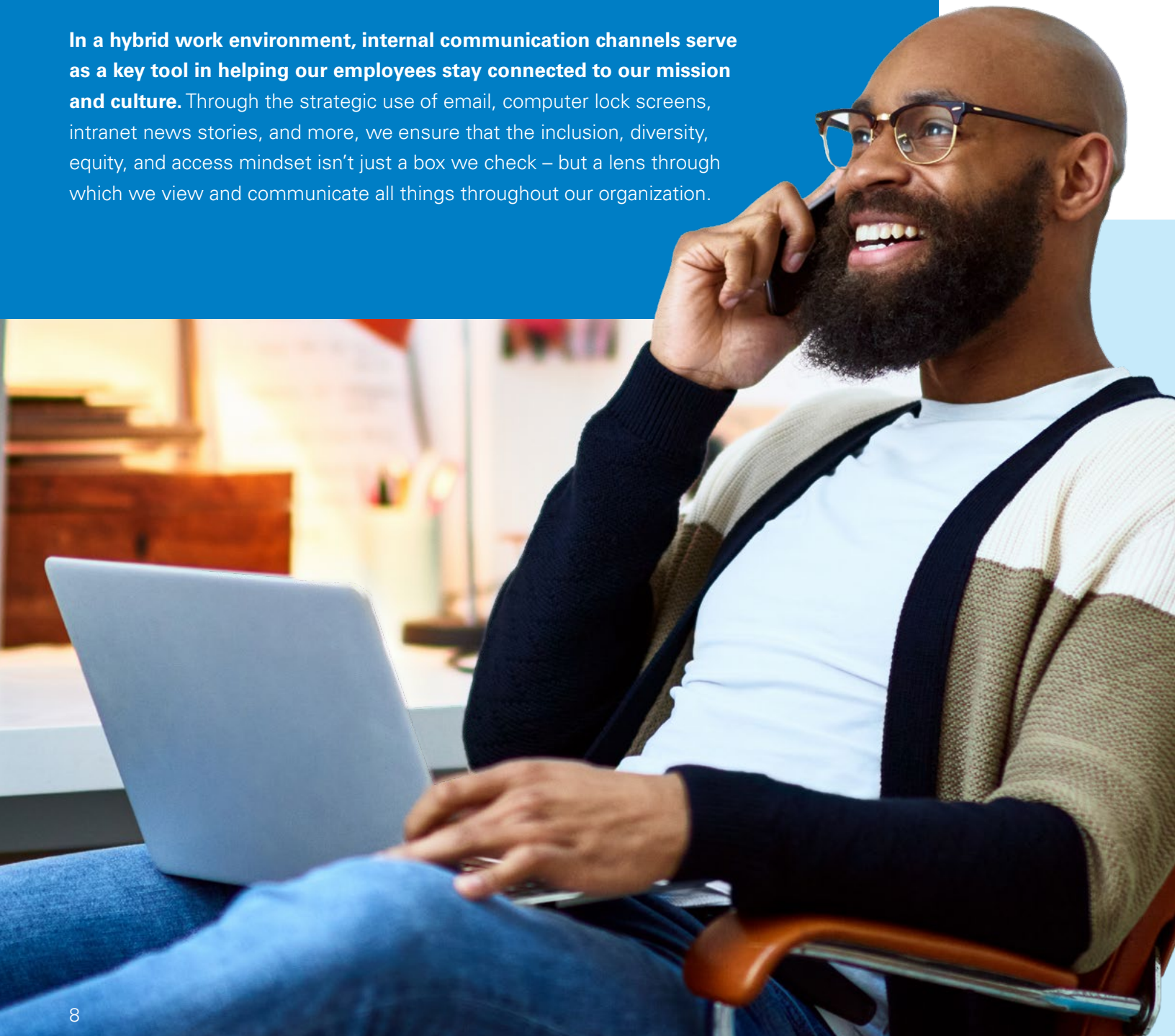
13.24%

Female and Racial/Ethnic Representation



Keeping I.D.E.A. at the forefront in our hybrid work environment

In a hybrid work environment, internal communication channels serve as a key tool in helping our employees stay connected to our mission and culture. Through the strategic use of email, computer lock screens, intranet news stories, and more, we ensure that the inclusion, diversity, equity, and access mindset isn't just a box we check – but a lens through which we view and communicate all things throughout our organization.



Intranet as an I.D.E.A. hub

Our intranet platform is more than just a repository of information; it's a central hub for all things I.D.E.A. That includes dedicated sections for resources, training materials, and updates on our various diversity, equity and inclusion (DEI) initiatives, ensuring employees have easy access to information. Plus, by connecting employees across teams, departments, and businesses, our intranet platform helps us create a sense of inclusion, belonging, and community every single day.

Storytelling through the I.D.E.A. lens

While we have a dedicated team in charge of creating and promoting all things DEI, our communication experts also work strategically to ensure we're creating inclusive and accessible content across the organization. This includes using inclusive language, adding alternative text for images, and making sure all videos we share have closed captions and transcripts. It also means bringing different perspectives into every story we share, encouraging employees to think critically about DEI.

Rotating lock screen messages

Our companywide computer lock screens are the first thing employees see when they log on in the morning, and we're intentional about how we use this tool to advance our I.D.E.A. mindset. We've created lock screens promoting our employee resource groups, I.D.E.A. series, DEI Book Club, Inclusion Survey, various holidays and observances, and other DEI initiatives and events.

Emails and reminders

Email is the backbone of our daily communications with our staff, and just another way we reinforce our commitment to I.D.E.A. We send a daily e-newsletter to employees, sharing the top things they need to know for that day, and a weekly e-newsletter to leaders that includes business-critical information. With both, we include updates on all our I.D.E.A. initiatives to ensure information is cascaded widely – because I.D.E.A. is everyone's responsibility.



Internal development resources

By keeping I.D.E.A. at the forefront of employees' minds, we're advancing a culture in which everyone feels valued, heard, and empowered to do their best, together. **We all have a responsibility to model I.D.E.A., and for employees who want to dive deeper, we offer a range of DEI resources and programs, such as:**

- **An internal, online learning platform** that offers training on topics related to DEI, the I.D.E.A. Mindset, working with diverse and underrepresented groups, leadership development, emotional intelligence, time management, and more – including a 21-Day Racial Equity Challenge
-
- Free access to **LinkedIn Learning courses**
-
- **Internal leadership programs**
-
- Our Toastmasters program to help **enhance public speaking**
-
- Our **annual I.D.E.A. Series**, focused on cultural humility
-
- **Mentor and mentee programs**, including Advancing Diversity mentoring
-
- **Internal coaching** and insta-coaching
-
- **Tuition assistance** to access higher education
-
- **Our DEI Book Club**
-
- **Essential Habits training** twice per year for all leaders
-
- Mandated all-employee training on **cultural competence and humility**
-
- **Two new DEI-specific electives**, “Inclusive Language Workshop” and “Working Across Multi Generations”
-
- **Employee Resource Groups (ERGs)** that reflect the diversity of our workforce and provide meaningful connection, resources, and support to employees
-
- **Sponsorship to complete Dale Carnegie Skills for Success Training** and Dale Carnegie High Impact Presentations



I.D.E.A. is a group effort

Our Employee Resource Groups (ERGs) are critical partners, aligned to our DEI strategy. They reflect the diversity of our employees, amplify shared experiences, and serve as I.D.E.A. ambassadors.

31%

of Inclusion Survey participants have participated in an ERG-sponsored event

Our ERGs are open to all employees who want to connect, collaborate, and grow, regardless of identity or lived experiences. They provide meaningful connection, resources, and support for business and personal goals, while strengthening our culture and intersectional approach to I.D.E.A.

- **7 Generations**

- **Lifetime Pride**

- **African American ERG**

- **Open Door Alliance**

- **Asian ERG**

- **Veterans Network**

- **Awareness of Visible and Invisible Disabilities**

- **We Are One**

- **Conexión**

- **Women & Empowerment**



Building on our accomplishments

As we take meaningful steps to improve our company, we're proud of our progress. At the same time, we understand that we still have much work to do and continue to set annual goals as part of our corporate commitment to I.D.E.A.

Here are just some of our accomplishments this past year:

Recognized

For the ninth year in a row, we have been recognized as a **Corporate Equality Index Best Place to Work for LGBTQ+ Equality**. Administered by the Human Rights Campaign Foundation, the Corporate Equality Index is a national benchmarking survey and report on corporate policies and practices related to lesbian, gay, bisexual, transgender, and queer (LGBTQ) workplace equality.

In 2023, we were recognized as a **Forbes Best Places to Work for Diversity**.

We received the **Diversity Leader Award from Profiles in Diversity Journal**.

And finally, we were **recognized by Forbes as a Best Midsize Employer – with an emphasis on DEI** as one of the five areas evaluated as part of this award.

We also received a Disability Equality Index score of

100%

Since 2021, this comprehensive benchmarking tool has helped companies build a road map of measurable, tangible actions toward disability inclusion and equality.

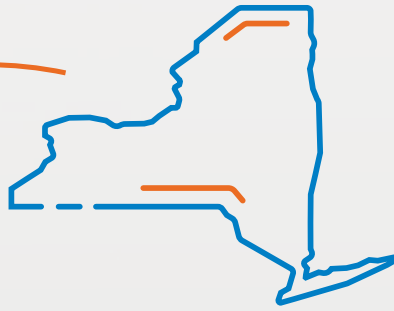
Honored

We were selected as one of the **Best Places to Work for DEI by the Rochester Business Journal and its program partner, Best Companies Group**. This regional survey and awards program was designed to identify, recognize, and honor the best places of employment for diversity, equity, and inclusion in Upstate New York, benefiting the region's economy, workforce, and businesses.



Celebrated

We continue to celebrate Juneteenth as a corporate holiday. This offers our team the time and opportunity to advance our knowledge and deepen our awareness on racial justice issues and attend any local Juneteenth celebrations.



Partnered

Each year, we partner with

more than **400**

community-based organizations providing support throughout Upstate New York.





Acknowledged

Sady Alvarado-Fischer, vice president, diversity, equity and inclusion officer, was the 2023 Greater Rochester Chamber of Commerce Colors of Success DEI Award recipient. She was one of 16 nominees honored during a ceremony at the Rochester Riverside Convention Center. The award is the chamber's highest recognition for individual achievement related to DEI and is presented to an individual who demonstrates exemplary leadership in advancing diversity, equity, and inclusion in the greater Rochester community with clear positive impacts.

Sady Alvarado-Fischer was also recognized and included in the 2023 Rochester Business Journal's Power List for LGBTQ+ Business Leaders.

Reaffirmed

We join the YWCA annually in **reaffirming our commitment to "Until Justice Just Is"** through an online pledge and learning on structural racism, bias, and how to be an ally.

Continued

We continued our **monthly I.D.E.A. educational series**, which welcomes subject matter experts to speak on DEI-related topics, increasing cultural humility and driving inclusive employee and member experiences.

We also require a mandatory all-employee cultural competence curriculum in alignment with National Committee for Quality Assurance (NCQA) requirements.

Invested

We continue to invest in external leadership programs that contribute to a more inclusive and equitable society, such as:

- **Participating in Rochester Urban League’s Interrupt Racism programming**
- **Having our leaders participate in the Eliminating Racism Group**
- **Sponsoring and participating in the United Way’s:**
 - **African American Leadership Development Program (AALDP)**
 - **Latino Leadership Development Program (LLDP)**
 - **Pride Leadership Development Program (PLDP)**
 - **Emerging Leaders Development Program (ELDP)**



Representation through self-identification

As our workforce continues to evolve, we recognize the importance of representation. For years we've been asked why our data only includes male and female gender identity options, and for the past two annual DEI reports, we've answered, "We're working on it." And we have been!

Recently, we successfully sourced and implemented a new enterprise resource planner (ERP).



A big part of this initiative included updating our voluntary self-identification options to be more inclusive and more accurately reflect the diversity of our workforce. When the new system went live across the organization on September 18, 2023, employees were encouraged to review and update their personal information, including categories and options that were not previously offered. We were able to **advance I.D.E.A. through more representative**, voluntary self-disclosure options for our employees, together.

The platform allows us to offer more robust and inclusive options across existing and new voluntary disclosure categories, such as veteran status, disability, race, gender, ethnicity, and sexual orientation. This will enable us to share expanded workforce representation data in 2024.

- **Gender options include:** Male, Female, Agender, Bigender, Non-Binary, Transgender Male, and Transgender Female, in addition to “I choose not to identify” and “Not declared”
- **Disability status options include:** Auditory/Hearing, Mobility, Thinking/Learning, Verbal Expression, Visual
- **Veteran status options include:** Special Disabled Veteran, Vietnam-Era Veteran, Newly Separated Veteran, Other Protected Veteran
- **Sexual orientation and pronouns** are also available and optional, along with the ability to write out names phonetically

Sharing self-identification information is always voluntary and a personal decision. And as a company, we have a responsibility to ensure people have the options to see themselves reflected if and when they choose to share that information. **Our goal is to create an even more inclusive experience for employees**, and self-identification increases the accuracy of our data. When we know our workforce, we can make better informed decisions to best meet the needs of our employees. **Representation matters!**



Capturing the intersectional identities of our employees

We asked employees what expanded voluntary self-identification options mean to them. Their answers remind us how feeling seen, recognized, and counted lead to greater feelings of belonging.



“As a biracial man, it is comforting to know that I don’t have to worry about checking one box for my race and neglect the others, which ultimately feels like neglecting part of who I am. Being able to accurately identify myself in an ERP system **allows me to bring my full self to work every day**. The company continues to build an inclusive experience where I no longer have to pull a chair to the table and prove why I deserve a seat.”

John Hill (he/him), business strategy manager

“Being able to self-identify my race and ethnicity is important because it solidifies that the company is **working to be inclusive of all employees**. Many times in my past when I checked a box to represent being Mexican, I only had Hispanic as a choice, which categorizes everyone who is from Latin/South America under the umbrella of Hispanic. To have the option of choosing Hispanic or Latino is inclusive of people who have Latin/South American ancestry, not just those of Spanish descent.”

Maureen Connell (she/her), clinical operations trainer



“Being able to accurately self-identify and be represented in an ERP system, I will be able to be represented as an employee with a disability and to specifically say what my disabilities are in an official, positive light. It also represents that our company **values creativity and innovation that results from a diverse workforce**, and that people and their contributions are recognized first, not their disability.”

Beth Ann Hinog (she/her), medical coding analyst



"The option to self-identify is important to me for multiple reasons. As a gay man, my biggest reason is because **I value working for an organization that encourages me to be my authentic self.** To feel comfortable with this, having the ability to showcase who I am through self-identification, being my authentic self, and feeling comfortable to do so, tells me that the company not only encourages it, but it's also a part of our DNA. The ability to share who we are, how we like to identify ourselves, and to feel comfortable doing so makes diversity within the organization a reality."

Jason Helsdon (he/him), director, talent acquisition



"I am very happy that there is an option to self-identify, and I also believe it is something that should be offered in general as not just a means of comradery, but mutual respect for all human beings no matter how they identify in any category. **This is another step in creating a feeling of equality.** Having these new self-identification options in place will hopefully create greater awareness of gender identity and pronouns, and increase the visibility of people like me, a Black nonbinary employee who uses they/them pronouns. Great job! Please continue to work toward equity in all its forms."

Terry Thomas (they/them), enrollment specialist

"The option to self-identify my veteran status within the system is very significant. It embodies the recognition of my service and the sacrifices I made for my country. Being able to identify myself and be represented means that my experiences, skills, and perspective as a veteran are acknowledged and valued in the workplace. It fosters an inclusive environment where I'm not just an employee, but a veteran who brings unique qualities and a different outlook. This recognition as a veteran encourages a workplace culture that respects diversity, promotes inclusion, and supports the needs of veterans like myself, ultimately **contributing to a more fulfilling and productive work experience.**"

Chad Tooke (he/him), provider network and strategy manager



"As an ERP change agent, I tested the application and got excited to update my personal information when we went live. As a Black lesbian with many other identities, **I feel seen. It's a wonderful feeling.** I'm able to and choose to select my gender, marital status, ethnicity, sexual orientation, pronouns, and even my citizenship status. It gives our organization a good idea of the diversity amongst our employees. The world around us seems to be changing its narrative on the importance of diverse voices. The information captured in the system shows that **the company is committed to growth and making this a great place to work.**"

Ann Marie St. Rose (she/her), operations project manager

Driving change:

Empowering health equity programs through strategic funding initiatives

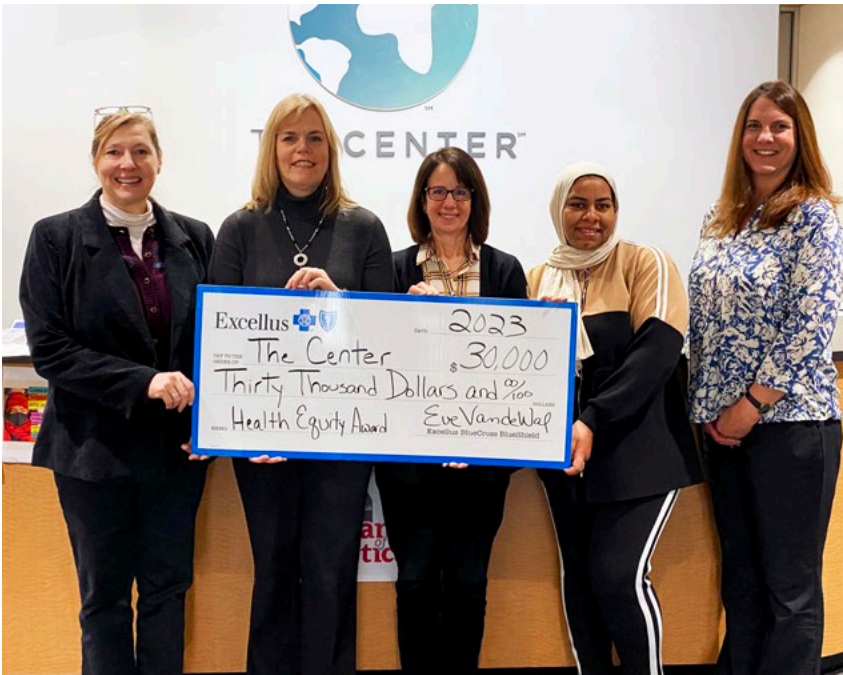
At Excellus BlueCross BlueShield, our mission is to help people lead healthier, more secure lives through access to high-quality, affordable health care. However, barriers encountered because of race, ethnicity, or social determinants of health can keep some people from living their best lives.

By promoting health equity, we aim to eliminate these disparities and improve overall population health. **That means addressing the root causes of health inequities, such as poverty, discrimination, and limited access to education, employment, and health care resources.** Leveraging community partnerships and our own resources, we're working to create a fair and just society where everyone has a chance to live a healthy life.



“Excellus BlueCross BlueShield Health Equity Innovation Award funding aims to support initiatives, programs, and research that specifically target and address the root causes of health inequities, with a focus on addressing structural racism. We believe that by investing in projects that tackle the underlying social, economic, and systematic factors that contribute to health disparities, we can work toward creating a more just and equitable health care system.”

— **Lisa Harris (she/her), MD, senior vice president and chief medical officer, Excellus BlueCross BlueShield**



Making investments to improve maternal health

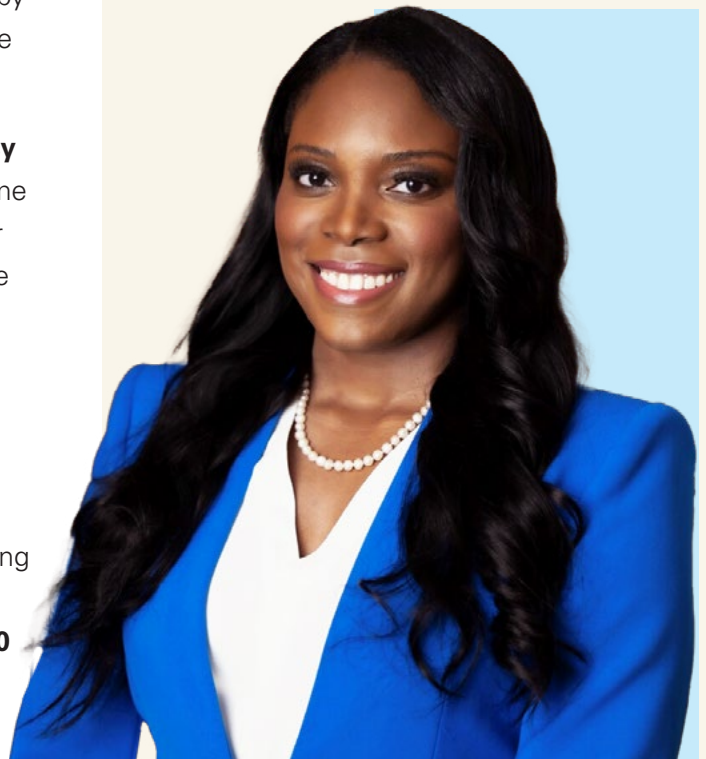
The Mohawk Valley Resource Center for Refugees (The Center) received a Health Equity Award grant to support Maternal Health Equity for Diverse Populations. This program builds on the CenteringPregnancy model that has been established by Mohawk Valley Health System (MVHS) by bridging the gap for diverse patients to access this innovative and patient-centered approach to maternal care.

MVHS offers the area's only licensed CenteringPregnancy program, which brings eight to 10 women all due at the same time together for prenatal care and peer support. The Center will add to this program by providing linguistically appropriate language services, cultural competency training, and transportation assistance.

The Center is a nonprofit organization dedicated to assisting refugees, immigrants, and Limited English Proficient (LEP) individuals throughout the integration process and helps them achieve independence and self-sufficiency by developing products and services that enable us to build community with many cultures. **The Center has resettled nearly 17,000 refugees from 36 nations since incorporating in 1981.**

“Health equity means everyone has a fair chance at living the healthiest life possible. It is also key to building a vital and thriving society. I look forward to taking a community-driven approach to engage and invest in activities that promote equity and ultimately member and community health.”

— **Simone E. Edwards (she/her), DrPH, MPH, vice president, health equity and community investments, Excellus BlueCross BlueShield**



Healthy Eating: Culturally Informed Plant-Powered Cooking Classes



Le Moyne College is a diverse learning community located in Syracuse that strives for academic excellence through its comprehensive programs rooted in the liberal arts and sciences. The college has a long-standing commitment to social justice and racial equity, the need for which was magnified as health disparities along racial and ethnic lines became even more prevalent throughout the COVID-19 pandemic. For minority populations that were now even more isolated, activities that promote healthy living and disease prevention became critically important for the **approximately 21% of Le Moyne students from underrepresented ethnic and racial backgrounds.**

The Health Equity Award funding enabled Le Moyne College to offer a “Healthy Eating: Culturally Informed Plant-Powered Cooking Classes” program, which ran from August 2022 through May 2023. The program hosted nine culturally informed plant-based cooking classes, taught by an experienced nutrition expert and plant-based chef. Most of the dinners were co-hosted by a student from a

specific cultural/ethnic background who worked with the chef to prepare a plant-based meal from their culture. Meals included Jamaican jerk tacos, Indian red lentil curry, Caribbean Rasta pasta, and a Moroccan vegetable and chickpea tagine.

The approximately 25 guests at each class, which included students as well as faculty and staff, were afforded the opportunity to learn more about nutrition and the impact their food choices have on their health. The context of shared cooking and meals also helped to address the mental health of the participants by lessening the sense of isolation and loneliness that became pervasive during the previous two years. And the classes deepened participants’ understanding and appreciation of various cultures and traditions. While these three benefits apply directly to program participants, participants can also share what they have learned with their families and friends, creating a ripple effect of positive health messaging throughout their respective communities.



“They’ve grown and matured here, explored and tried new things, and it’s been so rewarding to see them become who they are because of what they’ve learned.”

Ivelisse DeJesus is a mom of three. Her two daughters graduated from Nativity Preparatory Academy of Rochester and are now volunteers at the school. Her son Hector is currently an eighth grade student. She says it’s priceless to know the impact the school has had on her kids.

Extending skills beyond the classroom

After the final bell rings at 2:30 p.m., students and teachers at **Nativity Preparatory Academy of Rochester** regroup to continue learning through activities and fun. It’s one of the many ways the organization helps its middle school students be successful by extending the school day beyond reading, writing, and arithmetic.

“From tutoring, to music, to athletic programs, the diversity of resources we offer in the Extended Day Program from 2:30 p.m. to 4:30 p.m. gives students a chance to build skills in so many different ways,” says James Smith, president of Nativity Preparatory Academy of Rochester.

The Extended Day Program, supported through a Health Equity Award grant, exposes students to a wider range of subjects and activities. **They are offered tutoring or homework assistance and activities to develop skills in communication, team building, interaction, and problem-solving.**

Traditional classroom learning is complemented with what Smith refers to as “the fun stuff.” The “fun” includes arts, music, athletics, STEM (science, technology, engineering, math) activities, even a step-dancing team. “Oh, my goodness, we do love the step team!” says Smith.

The program also provides more flexibility for parents, eliminating the need for after-school care.



Health Equity funding expands access to speech and language therapy



To address the need for speech and language pathology (SLP) services in the community, we awarded Health Equity funding to the Binghamton University Speech, Language and Hearing Clinic to increase clinical access for high-need members of the community.

When Rodney Gabel, a Binghamton University speech and language pathologist who specializes in stuttering, arrived at Binghamton University, he learned that there weren't enough speech and language pathologists to meet the needs of the Southern Tier community. To address this need, Gabel joined the Decker College of Nursing and Health Sciences and created a division of speech and language pathology, where he is the founding director and a professor. He is developing a master's-level program in the discipline.

To help fill gaps in care in the community, the SLP program and clinic began to provide services to the area on a contract basis. The demand for clinic services has already been high, and community collaborations with student involvement allows organizations to provide services that they couldn't provide with their existing staff.

The Health Equity funding that was provided has allowed the Binghamton University Speech, Language and Hearing Clinic to expand their hours and resources at the clinic, located at the Health Sciences Building in Johnson City. **The clinic significantly increases access to speech and language therapy services in the area, while also serving as a clinical training site for undergraduate students.** Future graduate students will complete some of their clinical training at the location as well.

Advancing our commitment to supplier diversity, together

As one of Rochester's largest employers, Excellus BlueCross BlueShield is proud to join a new collaboration with other local companies to engage, support, and leverage our purchasing power with women and minority owned businesses.

Called the **Rochester Procurement Equity Project (RPEP)**, the program helps organizations reinvest money in the local community, while creating a platform to explore strategies and share resources that help smaller companies grow. The project is currently focused on women and minority owned businesses, but we understand there is a broader definition of supplier diversity and plan to continue our efforts toward greater inclusion.

"I often talk about our localism and the importance of what we do in our communities. This initiative aligns with our mission and vision and demonstrates our commitment to diversity, equity, inclusion, and access to help people and businesses expand, thrive, and live more secure lives," says **Jim Reed, Excellus BlueCross BlueShield president and CEO.**

"Work to better understand our current diverse supplier spending landscape is underway. We are excited to participate in the RPEP initiative," says **Tammy Linder, Excellus BlueCross BlueShield director, supplier solutions & contracting operations.**

"Over the coming months, we look forward to partnering with other local employers to share best practices, expand our current supplier diversity strategies, and leverage opportunities to support and engage women and minority owned businesses in our community."

As we continue to advance I.D.E.A., we're excited to see our supplier diversity efforts make a positive economic impact on our neighbors and our communities. And we're even more excited to do it together.

**Tammy Linder
(she/her),
supplier solutions
& contracting
operations**





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