

MANY VOICES, ONEDIGITAL

# DEI & B

DIVERSITY EQUITY INCLUSION BELONGING



ANNUAL REPORT

2024

# A LETTER FROM **KRISTEN ESKEW** VP OF DEI&B

Amid major organizations across industries pausing or dismantling their Diversity, Equity, Inclusion, and Belonging (DEI&B) efforts, I am especially proud to affirm OneDigital's continued commitment to DEI&B. To us, DEI&B is not an initiative; it is both a business imperative and a part of our core values. Our eyes remain not on the weather of the day, but on the climate of the era.

Whenever I'm describing OneDigital's dedication to DEI&B, I always say that it's a balance of two things: hard work and "heart" work. The hard work consists of objective metrics and making data-driven decisions, and the "heart" work is made up of the subjective ways in which all our individual life experiences impact our journey. Today, in an era when DEI&B faces significant headwinds, I find the line between hard and "heart" work becoming more and more blurred. Much like our purpose of being an organization that is helping people "do their best work and live their best lives," now more than ever, one simply cannot exist without the other. As you will see throughout these pages, I am proud that OneDigital remains fully dedicated to pursuing the hard work and maintains a strong and steady beat to our "heart" work.



OUR JOURNEY DOES NOT SEEK TO  
DEFINE A PERFECT ENDING;  
RATHER, WE ASPIRE TOWARD A  
CONSTANT STATE OF BELONGING  
THAT IS SEEN AND FELT GREATEST NOT  
THROUGH THE PRINTING OF THESE  
PAGES, BUT THROUGH THE WORK AND  
LIVES OF OUR PEOPLE.



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## OUR 2024 ACHIEVEMENTS



WATCH "CELEBRATING A YEAR OF MAKING IT MATTER"



**OUR PEOPLE-FIRST CULTURE DRIVES OUR GROWTH. WE'RE PROUD TO BE RECOGNIZED AS A LEADING WORKPLACE AT THE NATIONAL AND REGIONAL LEVELS.**

We earned over 30 national and regional awards for our caring culture, supportive management team, and wellbeing benefits, including first-time rankings on three of the Fortune Best Workplaces lists.



OUR FORTUNE SURVEY RESULTS SHOW WHY WE WON

**91 %**

My company is a great place to work

Fortune benchmark is 57%

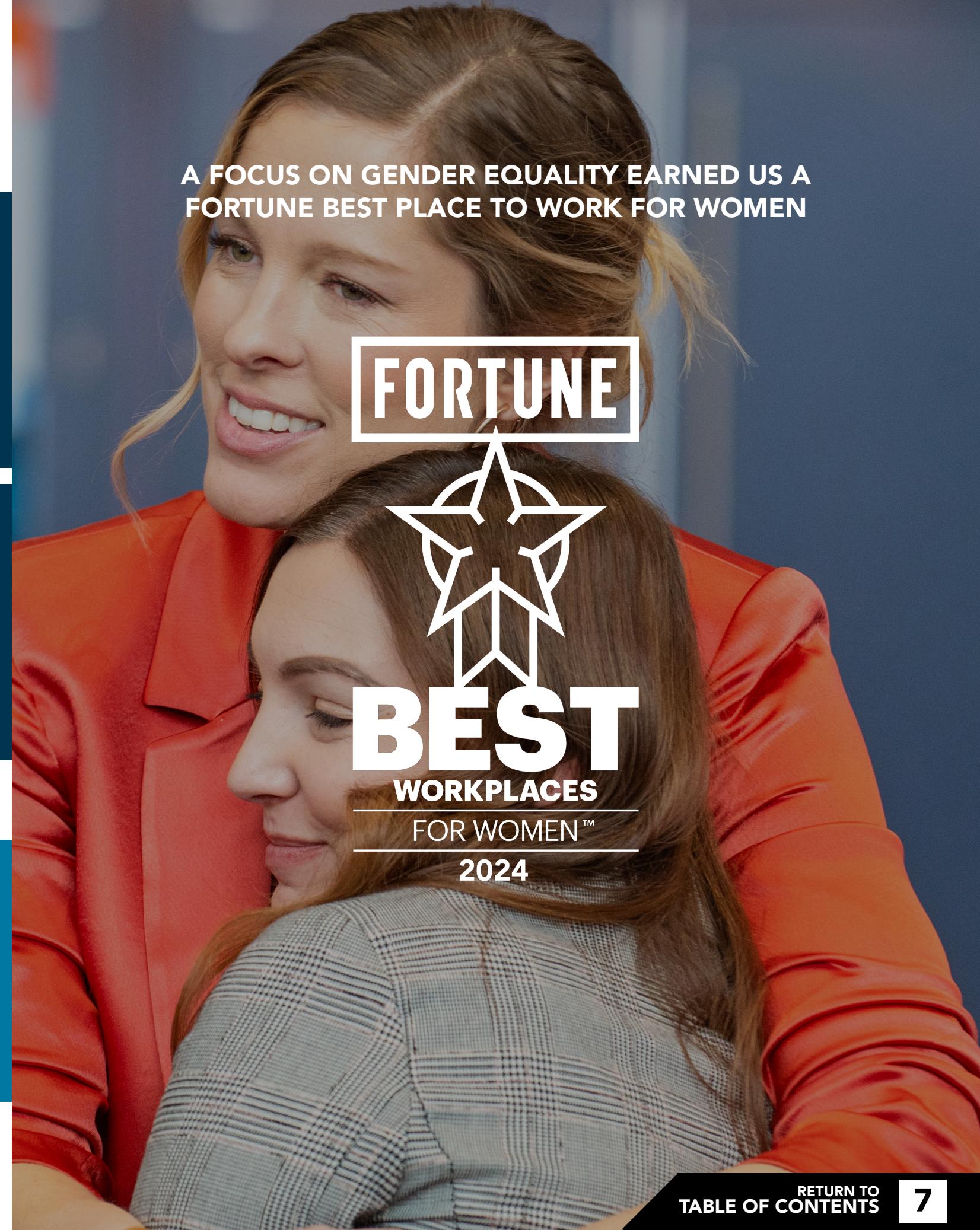
**95 %**

People care about each other here

**93 %**

Management trusts people to do a good job

**A FOCUS ON GENDER EQUALITY EARNED US A FORTUNE BEST PLACE TO WORK FOR WOMEN**



**2X**  
PROMOTED  
WOMEN TO FIRST-TIME  
MANAGER ROLES AT TWO  
TIMES THE RATE OF MEN



WOMEN WERE  
PROMOTED AT A  
HIGHER RATE THAN  
MEN IN 2024

**22 %**  
INCREASED WOMEN  
INTO SENIOR  
LEADERSHIP ROLES  
BY 22%

## WOMEN IN LEADERSHIP

**47 %**  
Senior Corporate  
Leadership

**31 %**  
Senior Field  
Leadership

**62 %**  
Middle  
Management

Key examples of how we are working to advance women on our team include the promotions of Emily Bailey from Connecticut Managing Principal to Regional Managing Principal for our Northeast region, and Michele Dixon from HR Technology Practice Lead to National Vice President, HR Technology Consulting.



**“** I am incredibly grateful for the support OneDigital has provided in fostering my career growth. From offering leadership development training and learning opportunities to creating an inclusive environment that encourages innovation, the organization has empowered me at every turn.

**EMILY BAILEY,**  
Regional Managing Principal **”**

**“** OneDigital has been instrumental in my career growth over the past three years, providing me with the autonomy to explore new ideas and learn from inspiring leaders. This supportive environment has fueled my passion for our shared mission to serve our clients, employees, and community.

**MICHELE DIXON,**  
National VP, HR Technology Consulting **”**



## ONEDIGITAL WOMEN INSPIRING OUR PEOPLE



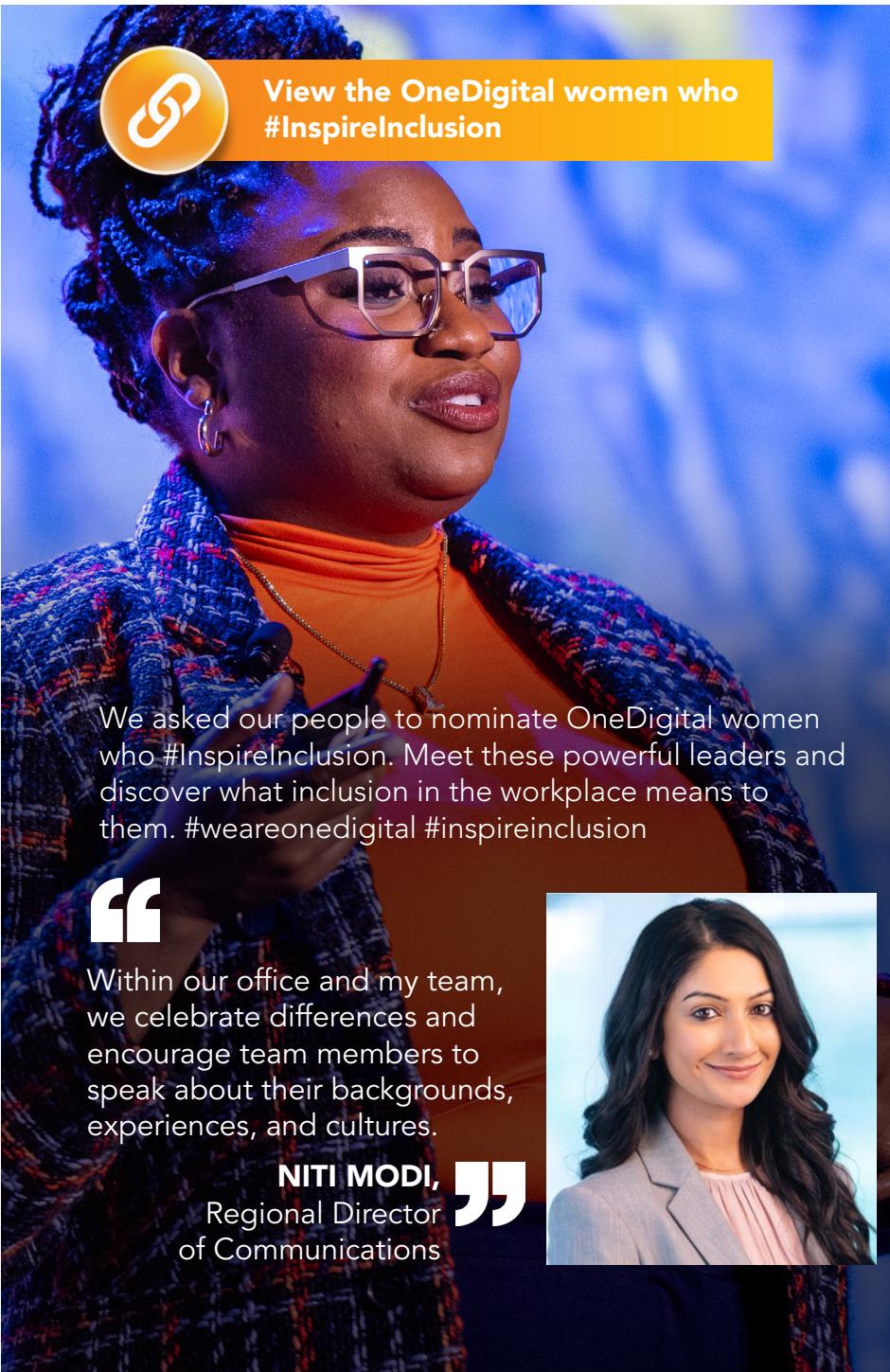
Elizabeth Chrane Named Top  
10 Human Resource  
Professional Award Winner  
in the World



Kristen Eskew was Awarded in  
the Top 50 of the 100 Top DEI  
Professionals in the World



Marcia Calleja-Matsko, Finalist  
Georgia CIO of the year



We asked our people to nominate OneDigital women who #InspireInclusion. Meet these powerful leaders and discover what inclusion in the workplace means to them. #weareonedigital #inspireinclusion



**“** Within our office and my team, we celebrate differences and encourage team members to speak about their backgrounds, experiences, and cultures.

**NITI MODI,**  
Regional Director  
of Communications **”**

## 27 ONEDIGITAL WOMEN MAKE NAPA'S TOP WOMEN OF EXCELLENCE



**“** We are thrilled to celebrate the extraordinary women being recognized for their dedication to their clients and continually moving the retirement industry forward.

**VINCE MORRIS,**  
President, Financial Services **”**



## OUR DEI&B MISSION & FIVE FOCUS AREAS

We are committed to preserving a culture that celebrates diversity, insists on equity and inclusion, and connects us. Our people feel seen, valued, respected, and supported.

**OUR CULTURE STRIVES TO CREATE A SAFE ENVIRONMENT WHERE WE CAN ALL BRING OUR AUTHENTIC SELVES TO WORK BECAUSE WE BELIEVE THAT OUR UNIQUE SKILLS, CULTURAL VALUES, DIVERSE BACKGROUNDS, AND FRESH IDEAS ARE WHAT MAKE US STRONGER.**

### 1

#### INCLUSION & BELONGING

We make it matter by bringing people together and empowering the unique magic of our people. At OneDigital, it's not just safe to be your authentic self, we're lost without it.



### 2

#### LEARNING & COACHING

We believe in balancing the nuances of an ever-changing world with a never-ending curiosity. Through education, mentoring, and professional development programs, we are building skills for our people to lean into difficult conversations, build community, and utilize their diverse perspectives and lived experiences to tackle complex challenges.

### 3

#### ASSESSMENT & TRANSPARENCY

We hold ourselves accountable by measuring and communicating our progress.

### 4

#### GROWING OUR TEAM

We hire the best person for the job, period. And we're intentional about finding top talent in places that have been historically overlooked. We believe that a person's value is based not just on what they can do, but on who they are.

### 5

#### SOCIAL RESPONSIBILITY & GIVING

Giving back to our communities through volunteer efforts and financial giving isn't just a responsibility; it is an honor. We embrace the goal of representing the communities we serve by investing in local causes focused on reducing social inequities.



## INCLUSION & BELONGING



### EMPLOYEE RESOURCE GROUPS: MAKING MOMENTS THAT MATTER

Our ERGs help bridge gaps while creating safe spaces where individuality and differences thrive. These groups are volunteer, employee-led communities where participants and allies put curiosity, career development, and belonging into action.



#### Accelerating Career Excellence (A.C.E.)

Providing career development, networking, and mentorship opportunities for early career professionals



#### Bringing Real Awareness to Veterans Everywhere (B.R.A.V.E.)

Honoring those who have served or currently serve in the military, military families, and their supporters



#### Black Females Forward (B.F.F.)

Expanding the reach, elevating the voices, and enhancing the experience of our Black female professionals



#### Neurodiversity Network

Learning about and celebrating neurodiversity to better support colleagues, friends, and family members



#### OnePride

Creating a safe, inclusive, and empowering workplace for all LGBTQIA+ employees and allies



#### The Gathering Place

Connecting employees to our culture and mission through creative activities and communication channels



#### Unidos as One

Celebrating the diverse cultures, experiences, and contributions of our Hispanic and Latino members



#### Women's Initiative Network for Growth and Success (W.I.N.G.S.)

Promoting unification, empowerment, and the uplifting of all women



#### Working Parents Village

Sharing ideas and supporting one another, parent to parent



## ONEPRIDE SPONSORS HUMAN RIGHTS CAMPAIGN



In partnership with OneDigital's Washington, D.C. team, OnePride sponsored the Human Rights Campaign (HRC) National Dinner for the second year. The dinner is a part of HRC's annual Equality Convention, which is dedicated to driving LGBTQIA+ equality forward.



Having OneDigital sponsor the HRC event is the proudest moment of my career. My wish is that everyone experiences this same feeling of belonging and acceptance that I feel every day I come to work.

**SPENCER WHALEN,**  
Sr. Business Development Executive  
(OnePride ERG Chair)



## A.C.E. BRINGS IN THE HEAVY HITTERS



A key focus area of A.C.E. is to introduce early career professionals to senior leaders. The group developed and launched the "Ask an Exec" series where senior leaders shared their career journeys, the best advice they ever got, and even some embarrassing moments. Highlights included candid chats about how your career path involves taking risks with President and CEO Adam Bruckman and how to manage impostor syndrome with Chief People Officer Elizabeth Chrane.



 When I started as an intern, I was nervous about finding my place in the company and adjusting to a professional environment. A.C.E. has given me a sense of community and support that's helped me feel more confident as I navigate the early stages of my professional career.

When Adam Bruckman spoke with A.C.E., it was evident just how much our company's culture reflects the leadership team's values and vision.

It's moments like that that make me feel like I belong at the company, and proud to work at OneDigital!

**DANIELLA KING,**  
Enterprise Marketing Coordinator

# WELCOMING UNIDOS AS ONE



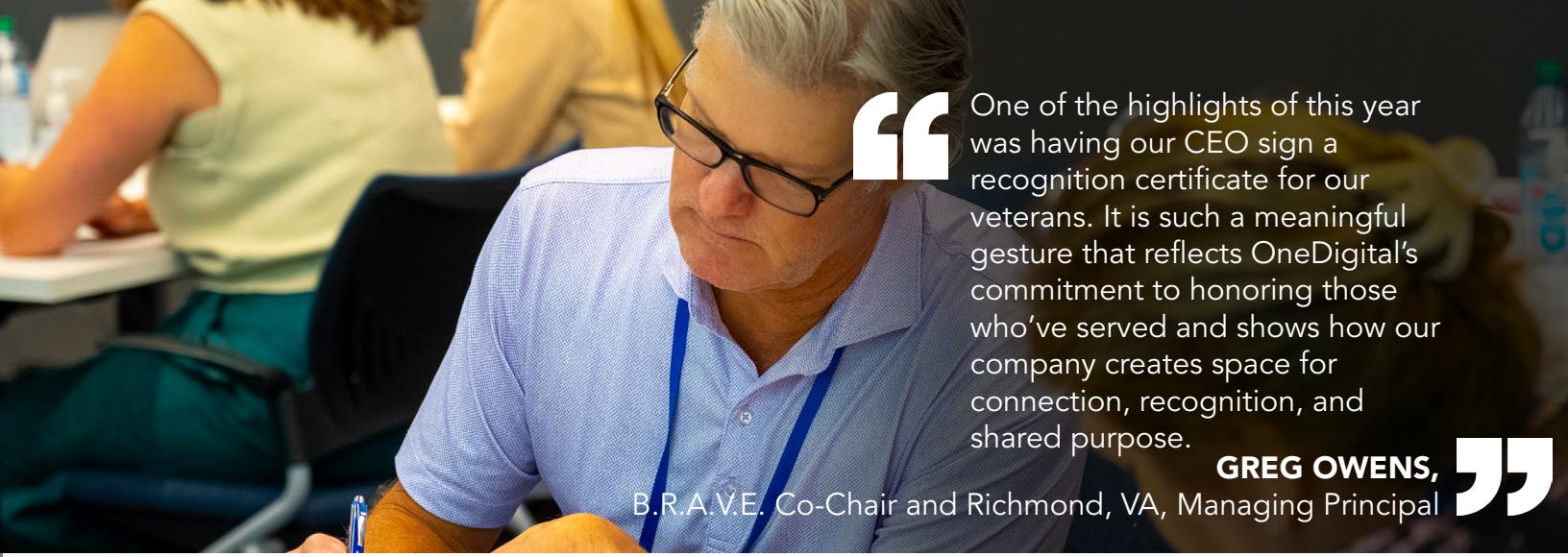
From hosting live Hispanic-themed cooking classes to taking their members on a virtual tour of Machu Picchu, Unidos as One, the latest addition to our ERG family, strives to build a vibrant community that is enhancing our culture of belonging in creative ways.



## “¡UNIDOS! AS ONE”

The virtual tour of Machu Picchu and Cusco was a wonderful way to celebrate Hispanic culture and history. My hope is that this event sparks curiosity in all to explore and learn about diversity of cultures that enrich our OneDigital community.

**LOURDES RODRIGUEZ-MORERA,**  
Director of Senior Counsel and  
Unidos as One co-founder



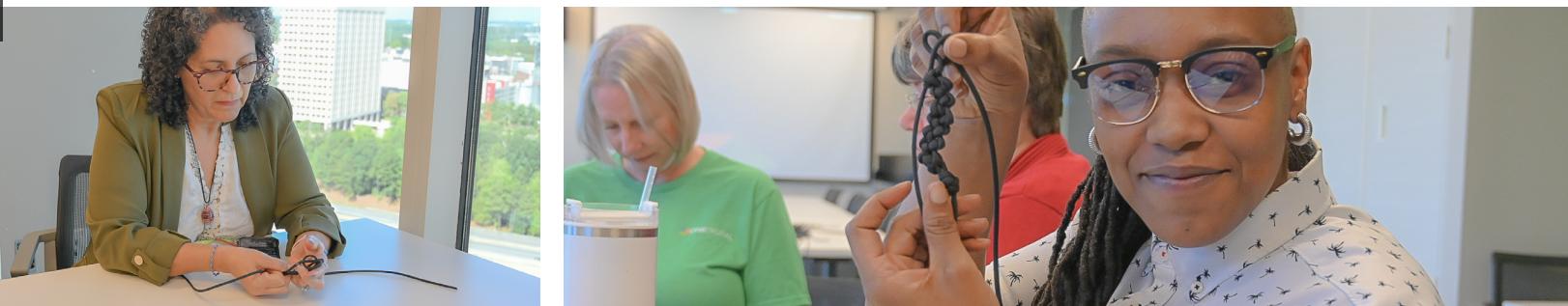
One of the highlights of this year was having our CEO sign a recognition certificate for our veterans. It is such a meaningful gesture that reflects OneDigital's commitment to honoring those who've served and shows how our company creates space for connection, recognition, and shared purpose.

**GREG OWENS,**  
B.R.A.V.E. Co-Chair and Richmond, VA, Managing Principal

## B.R.A.V.E. SUPPORTS VETERANS WITH PARACORD LANYARD CAMPAIGN



On Veterans Day, OneDigital showed gratitude to those who served by donating over 3,500 handmade paracord lanyards to Operation Gratitude, an organization that bridges the gap between civilians and those who serve. Spearheaded by the local DEI&B committee in our Berwyn, PA office, the effort mobilized team members from our regional offices in Kansas, Ohio, Georgia, Texas, and Massachusetts.

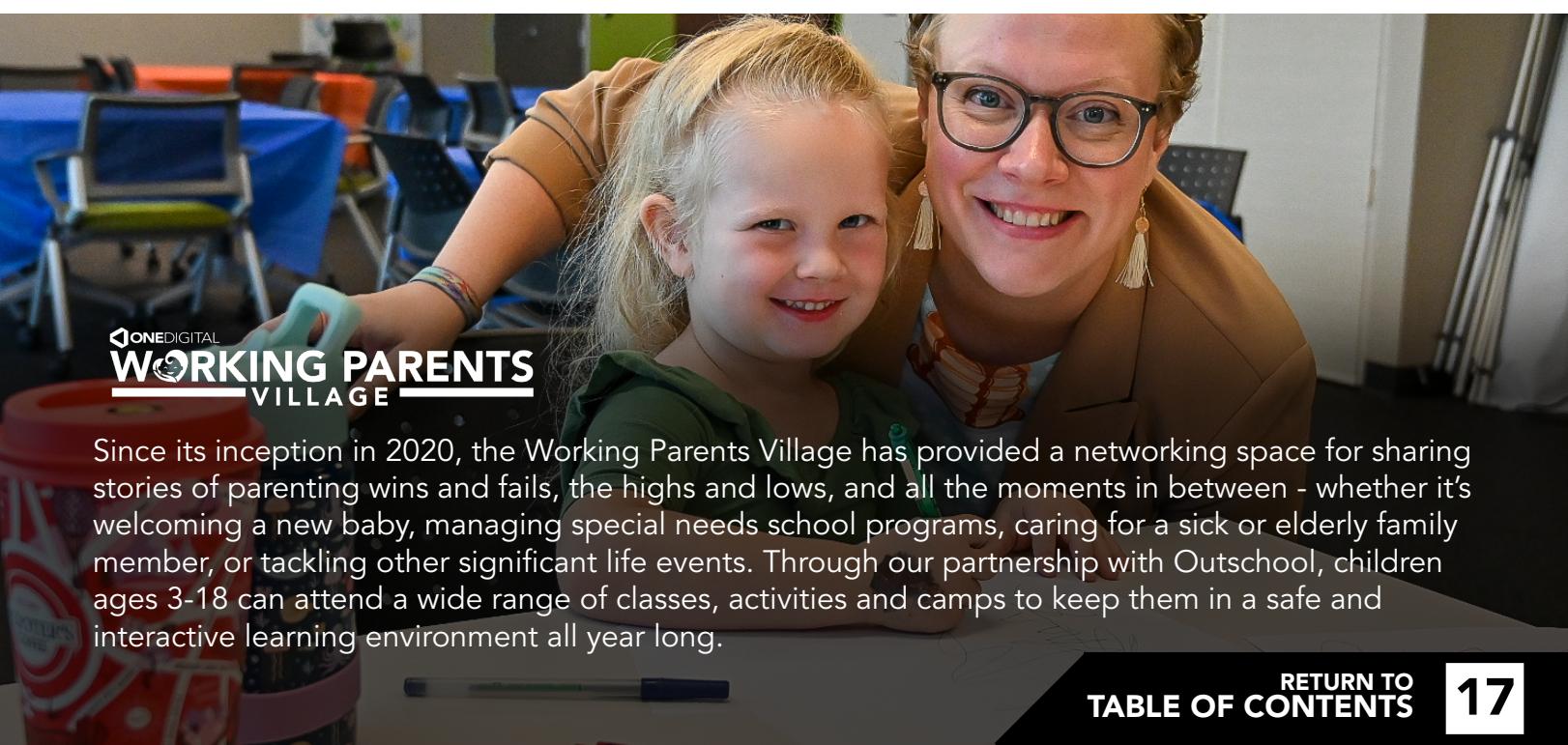


## CONNECTING AND UNITING OUR PEOPLE ACROSS ONEDIGITAL

“The ERG committee works hard to create a group that is open and inclusive. I have been involved with the Cooking Class since its inception, which has given me the opportunity to meet many new people, and also turn out some magnificent meals for my family!

**JACKIE STARR,**

Enterprise Senior Benefits Consultant



Since its inception in 2020, the Working Parents Village has provided a networking space for sharing stories of parenting wins and fails, the highs and lows, and all the moments in between - whether it's welcoming a new baby, managing special needs school programs, caring for a sick or elderly family member, or tackling other significant life events. Through our partnership with Outschool, children ages 3-18 can attend a wide range of classes, activities and camps to keep them in a safe and interactive learning environment all year long.



## NEURODIVERSITY NETWORK & ONEPRIDE PRESENT DOUBLE RAINBOW



## THE W.I.N.G.S. MENTORSHIP PROGRAMS DRIVE SUCCESSES



X



Recent studies show that neurodivergent individuals are more likely to identify as LGBTQIA+, so our Neurodiversity network and OnePride ERG held a "Double Rainbow" event where panelists shared insight into how these two vibrant communities intersect.



**“** To support neurodivergent team members and break down barriers, leaders should listen closely to their needs, offer adaptable work arrangements, and encourage our people to learn more about Neurodiversity. This builds a workplace where everyone's unique strengths are valued and understood.

**HANNAH ZIESER,**

Senior Manager of Project Management - PMO **”**



A record-setting 150 participants joined the W.I.N.G.S. ERG for its third annual mentorship program, where mentors and mentees facilitate growth, innovation, and career development through cross-functional connections.

**“** My mentor provided a safe space for me to share my career goals and learn from her wealth of experience. With her encouragement, I was able to initiate productive conversations with my manager.

**SHAR BANERJEE,**  
Client Executive **”**

**“** I've enjoyed supporting my mentee and connecting them to team members from various departments, which has enriched our collaboration and fostered a sense of community across the organization.

**MELANIE HOOBLER,**  
HR Consulting Senior Manager **”**





## THE B.F.F. ERG LAUNCHES SISTER-TO-SISTER PROGRAM

The Sister-to-Sister Program aims to create a supportive and empowering community for Black women and their allies. 50 women participated in the first edition where they spent time building and sharing lived experiences around personal and professional groups.

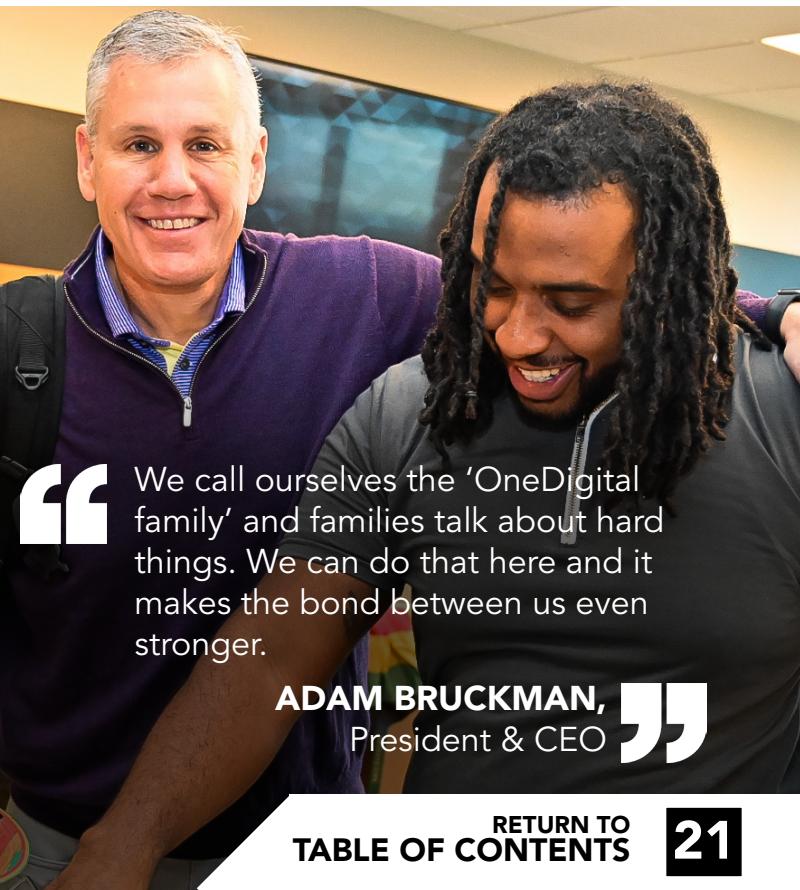
**“**The B.F.F. ERG has been a vital support system. It provides a safe space where we can connect with others who understand the unique challenges we've faced.

**KIMBERLY WALLACE,**  
Senior Benefits Coordinator  
and BFF board member



### FIRST ANNUAL ERG SUMMIT BREAKS DOWN BARRIERS

Our inaugural ERG Summit united leaders from our nine ERGs and local DEI&B committees for three inspiring days at our headquarters in Atlanta. Attendees engaged in strategic discussions with executive leaders about how DEI&B impacts our culture and the success of our business, while charting a collaborative path forward.



**“**We call ourselves the 'OneDigital family' and families talk about hard things. We can do that here and it makes the bond between us even stronger.

**ADAM BRUCKMAN,**  
President & CEO



## INVESTING IN OUR PEOPLE

At the heart of our mission to set our people up for success lies a deep commitment to fostering a vibrant and inclusive culture. Our Learning & Development programs are designed not only to offer education and growth, but to transform how we ensure every voice is heard and valued.



ONEDIGITAL LEARNING INSTITUTE

OLI offers free access to career and personal development opportunities to all our people including teachings and certificate programs from world-class institutions, such as Duke, Stanford, Berkeley, UVA, Columbia Business School, and more!

In 2024, our people completed over 500 hours of training on psychological safety and building high-performing teams.



## INVESTING IN OUR LEADERS

Since 2022, we've provided unlimited access to executive education short courses, added a library of management training, reimagined and relaunched the Foundations of Management program for all leaders new to OneDigital or new to leading people.

Our people-first culture provides our managers with greater autonomy and resources to invest in the professional growth of their teams.

## LEADERSHIP ESSENTIALS

To upskill our senior leaders, the Learning & Development team launched a new development program this year for senior leaders. Participants expanded their ability to conduct conversations on critical topics, build greater trust with their people, and lead change. This investment is keeping our people-first culture strong.

Achieved the highest participation rate in professional development programs

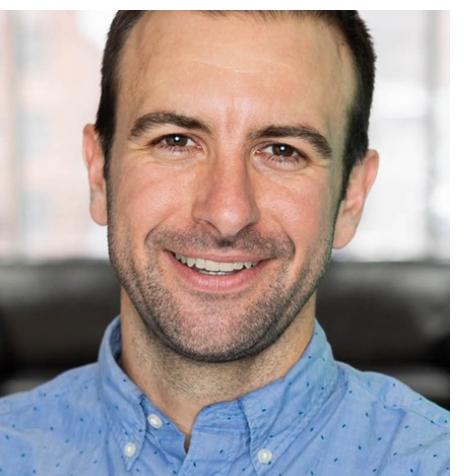
Leader feedback was extremely positive (NPS = 80)

Intent-To-Apply data suggests strong adoption (ITA = 95%)



As someone who joined from an acquisition, participating in Leadership Essentials gave me a better insight into what it meant to be a leader at OneDigital. The cohort model also allowed me to network and build a community of leaders who have been instrumental in providing me with coaching and guidance as I faced challenges.

**PATRICK CERONE,**  
Midwest Sales Director





## ASSESSMENT & TRANSPARENCY

### WE ARE MANY VOICES, ONEDIIGITAL

To create a more inclusive future, we must assess our current state. This includes measuring and communicating data on our demographics, employee engagement, feedback, and pay equity.

## EMPLOYEE DEMOGRAPHICS AS OF DECEMBER 31, 2024

**4,739**

TOTAL NUMBER OF EMPLOYEES

UP 15% OVER PRIOR YEAR

1%  
Undeclared

1%

Undeclared

37%

Male

62%

Female

Gender

LET'S BREAK IT DOWN

1%

4%

49%

1%

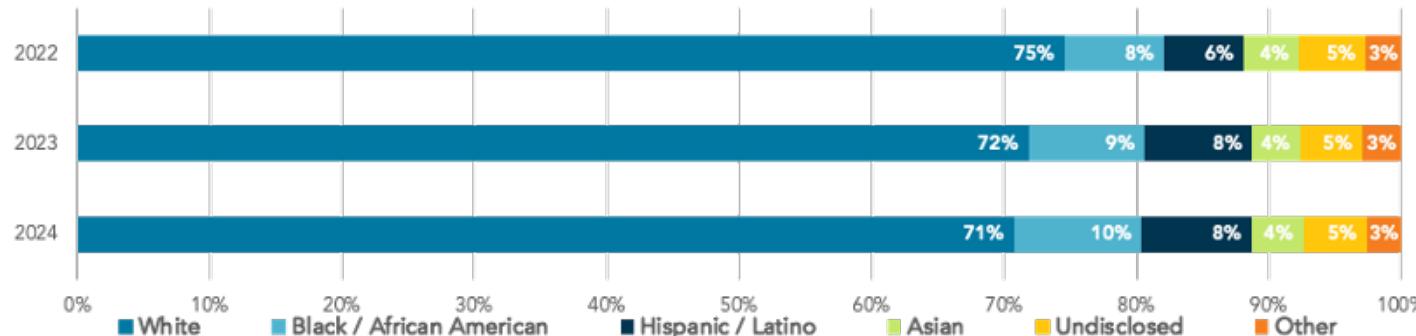
4%

All employees by management levels

46%

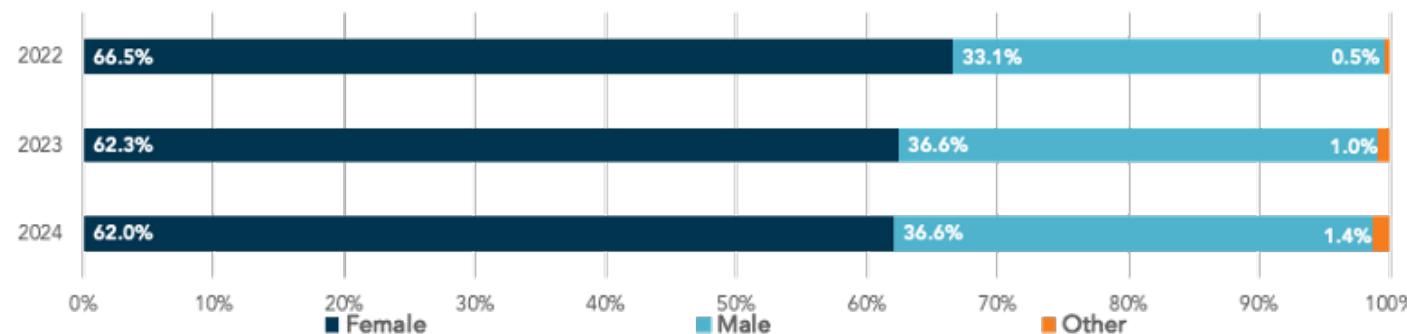
- Independent Contributor
- Sr. Corp. Leadership
- Middle Management
- Sr. Field Leadership

We are continuing to improve representation across all racial and gender groups to create a more balanced workforce.



## RACIAL DEMOGRAPHICS

## GENDER DEMOGRAPHICS



## OTHER DATA AS A PERCENTAGE OF OUR TOTAL WORKFORCE

AVERAGE NEW HIRE AGE

**32**

AVERAGE AGE

**42**

OVER AGE OF 50

**32 %**

## YOUR VOICE MATTERS

### 2024 DEI&B EMPLOYEE SURVEY DATA

Listening to our people is how we know what's working and where there's room for improvement. Here's what we heard.



## IT STARTS FROM THE TOP!

Our managers continue to foster a culture of belonging. Requiring psychological safety training and courses in Leadership Essentials have helped managers invite more diverse ideas.

## OUR HIGHEST MANAGER ENGAGEMENT SCORES

I can have open and honest conversations with my manager.

I believe my manager treats all team members fairly.

My manager values diverse ideas and perspectives.



Our leadership team has created such a safe space for diversity of thought. They are true role models in embracing various ideas and perspectives.

## ANONYMOUS SURVEY COMMENT



## PROGRESS IN OUR CULTURE OF BELONGING

### DIVERSITY, EQUITY, INCLUSION, AND BELONGING ARE VALUED AT ONEDIGITAL (RESPONSES BY BLACK WOMEN)



The survey data shows an increase in Black women feeling supported and having a true sense of belonging.

The satisfaction rate among our Black women has been rising steadily over the past 3 years.

## RESPONDING AND ACTING ON FEEDBACK

Scores from all people who identify as Black have also shown significant improvement over prior years.

There is an especially strong sentiment among our Black colleagues that the company and individuals continue to communicate our DEI&B efforts externally.

### RESPONSES BY BLACK (NOT LATINO OR HISPANIC) EMPLOYEES

It's important to me that OneDigital champion DEI&B with our clients and within our communities.

100

90

80



JAN 2021

JAN 2023

JAN 2025



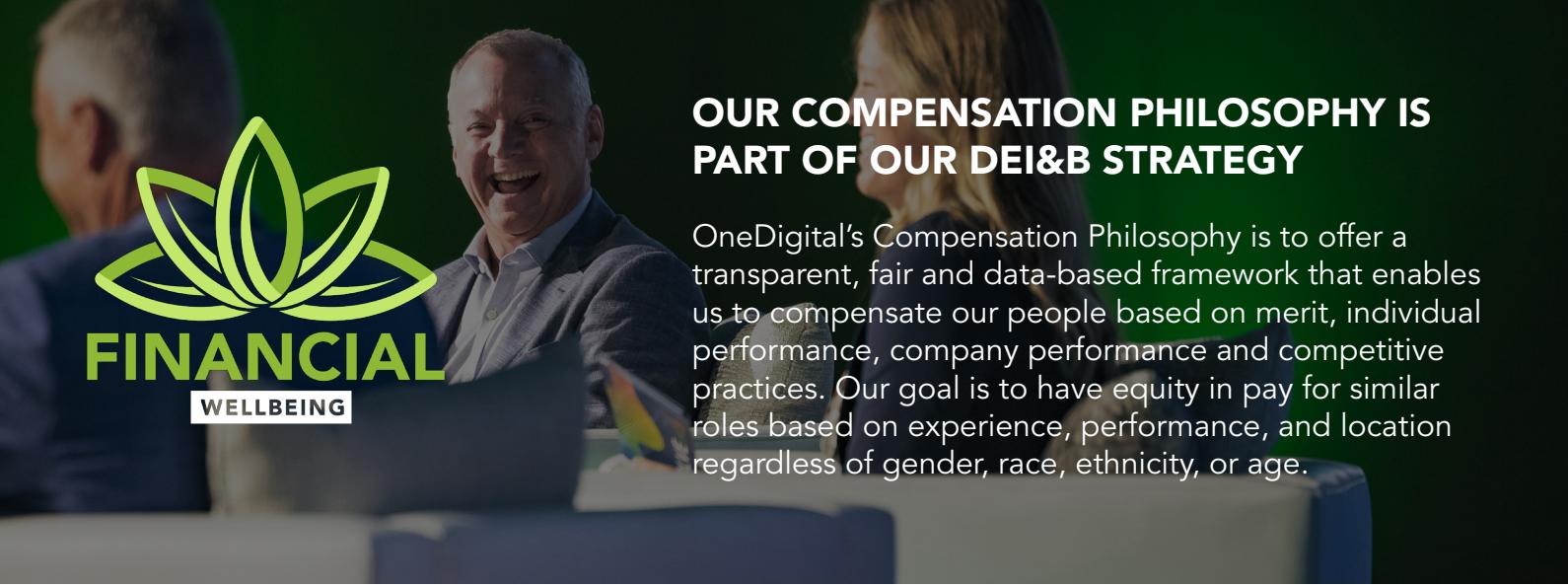
It is important and appreciated to see OneDigital championing DEI&B with our clients and in our communities. This is key to our unique business model and perspectives. We are able to relate to and create viable solutions for our clients and communities.

ANONYMOUS SURVEY COMMENT



#### OVERALL FAVORABILITY

92 %



## OUR COMPENSATION PHILOSOPHY IS PART OF OUR DEI&B STRATEGY

OneDigital's Compensation Philosophy is to offer a transparent, fair and data-based framework that enables us to compensate our people based on merit, individual performance, company performance and competitive practices. Our goal is to have equity in pay for similar roles based on experience, performance, and location regardless of gender, race, ethnicity, or age.

The purpose of our compensation programming is to:

Support our core mission and business objectives.

Ensure every employee at OneDigital feels valued and fairly compensated for their specific role, performance, and contributions to OneDigital's success.

Provide a mix of cash, merit increases, bonus, variable compensation, long-term incentives, and equity to attract, motivate, and retain high-caliber of talent.



Our DEI&B efforts are fundamental to our pursuit to build an environment where our people can do their best work and live their best life. What sets us apart is our transparency in sharing our progress toward achieving our DEI&B goals and commitments.

ELIZABETH CHRANE,  
Chief People Officer



## OUR ANNUAL SURVEY DATA SHOWS THAT OUR PAY PHILOSOPHY IS UNDERSTOOD

When we asked our people, they state that they have a clear understanding that compensation is based on merit and not based on age, gender, race, national origin, etc.

WE ACHIEVED THIS BY

Increasing communications explaining our compensation philosophy.

Expanding access to reports showing the total value of each individual's pay, benefits, and total wellbeing programs.

Providing more manager training and communication resources to enhance their ability to discuss compensation with their team.

# PAY EQUITY

Every year, we conduct an analysis of all roles and pay ranges to ensure equitable compensation across all races, genders, and skill levels. As discrepancies arise, we work with managers to make salary adjustments as needed. This work has made a significant difference in reducing pay gaps among underrepresented minorities and women.

## PAY EQUITY BY RACE

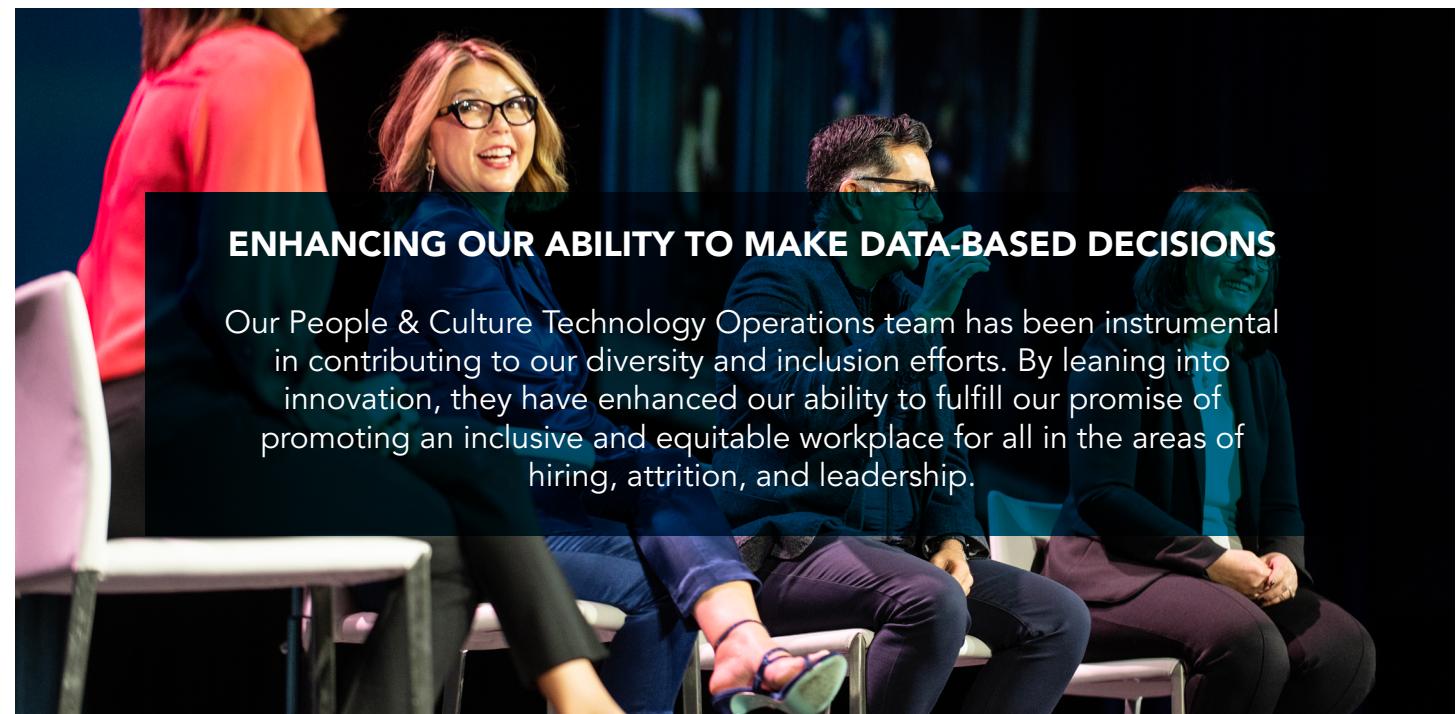


Underrepresented groups currently earn 97% of their white counterparts for similar/same skilled roles.

## GENDER PAY EQUITY

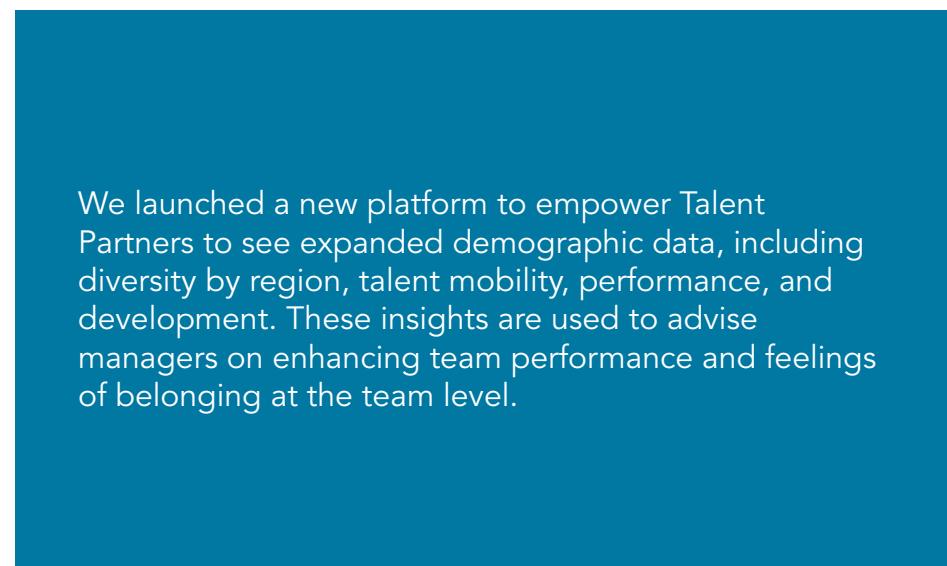


On average, women earn 98% of what their male peers do for the same/similar skilled roles.



### ENHANCING OUR ABILITY TO MAKE DATA-BASED DECISIONS

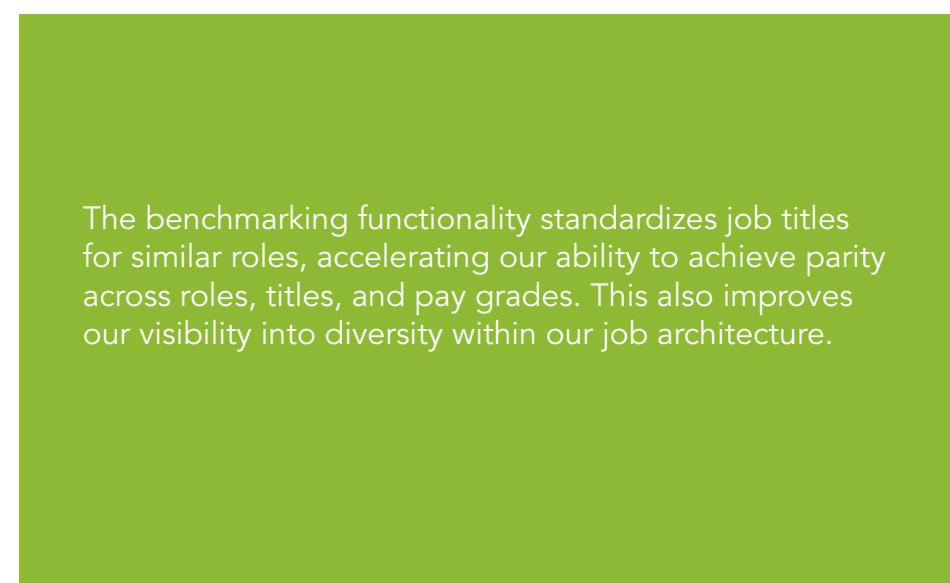
Our People & Culture Technology Operations team has been instrumental in contributing to our diversity and inclusion efforts. By leaning into innovation, they have enhanced our ability to fulfill our promise of promoting an inclusive and equitable workplace for all in the areas of hiring, attrition, and leadership.



We launched a new platform to empower Talent Partners to see expanded demographic data, including diversity by region, talent mobility, performance, and development. These insights are used to advise managers on enhancing team performance and feelings of belonging at the team level.



The benchmarking functionality standardizes job titles for similar roles, accelerating our ability to achieve parity across roles, titles, and pay grades. This also improves our visibility into diversity within our job architecture.





## GROWING OUR TEAM

### HIRING WITH INTENTION

We are fully committed to the standard of hiring the best of the best, and a part of our strategy is to intentionally recruit from communities that have diverse lived experiences and backgrounds.



IN 2024, FOR THE FOURTH CONSECUTIVE YEAR, WE ADVANCED OUR GOAL OF PRESENTING A DIVERSE CANDIDATE SLATE TO HIRING MANAGERS FROM 85% TO 89%.

Onboarded  
**1,282**  
organic hires

Our commitment to presenting managers with diverse candidate slates is paying off.



**50**  
%

Of organic hires were female



**MORE THAN 40**  
%

Of new hires were from underrepresented groups

All of our recruiters have achieved the [AIRS Certified Diversity Recruiter](#) designation, which helps them integrate sourcing strategies and actionable methodologies to create and advance these efforts.

**AIRS®**  
powered by **ADP**



## RISING STARS JUMPSTART THEIR CAREERS AT ONEDIGITAL

Our 2024 class of summer interns joined our 10-week program to jumpstart their careers, goals, skills, and professional networks.

We're proud to have awarded our "Intern of the Summer," Kennedy Dickson, with a \$2,500 college scholarship for innovation and leadership. Additionally, the CIAB Council Foundation awarded \$5,000 scholarships to three of our interns after being nominated by OneDigital leaders.

Congratulations to these rising stars, who were also featured in the December issue of Leader's Edge Magazine!



Read the December issue of  
Leader's Edge Magazine



If our aim is to fundamentally reshape the industry we serve and impact the lives of millions of people, we must create equal partnerships with women and underrepresented groups – it's the only way we will know we have truly arrived.

**MIKE SULLIVAN,**  
Co-Founder & Chief Growth Officer

## OUR M&A STRATEGY ALIGNS WITH OUR BUSINESS OBJECTIVES

Our core belief is that, to be a true company of impact and consequence, we must work to expand the diversity of both our employee population and the clients we serve. To continue this build, the M&A team embarked on a multi-year initiative to attract more minority- and women-owned businesses.

**490**

Individuals joined OneDigital through an acquisition

**15%**

Of our acquisitions in 2024 were women- and minority-owned

**28%**

Of individuals who joined through an acquisition are from underrepresented groups

**64%**

Of individuals who joined through an acquisition are women



## JOINING FORCES WITH A SOCIAL IMPACT LEADER: NONPROFIT HR

We welcomed over 80 new employees across the nation by joining forces with Nonprofit HR, expanding our commitment to serving cause-based organizations.

Nonprofit HR is the country's leading and longest-serving firm focused exclusively on the talent management needs of the social sector, which includes associations, social enterprises, and other mission-driven organizations. Together, OneDigital and Nonprofit HR will expand our ability to serve these clients by providing services across all of our practice areas.



**Nonprofit HR is committed to fostering and maintaining a work environment where equity, diversity, inclusion, and justice (EDIJ) are fully integrated into everything we do for the benefit of our employees and the clients that we serve.**

**LISA BROWN ALEXANDER,**  
Senior Managing Principal,  
Nonprofit Practice 



**KRISTEN ESKEW,**  
VP of DEI&B

To attract the best talent out there, talent that is unique to the current makeup of our industry, we must first invest our time, resources, and maybe most importantly heart into them. We do not want them to fill our gaps; we want to learn and do our part in helping to fill theirs. Investing in ONEwoman is about walking that talk.

WELCOME TO THE

# 2024 ONEwoman Retreat

FEBRUARY 28TH, 2024  
SCOTTDALE, ARIZONA

**BUILDING COMMUNITY AT THE ONEWOMAN RETREAT**

Understanding that women business owners face distinct challenges and have limited opportunities to authentically connect among themselves, OneDigital invested in creating ONEwoman - a unique event curated specifically for women owners and thought leaders to build connections, share ideas, plan for the future, and learn from each other.





## SOCIAL RESPONSIBILITY & GIVING

### MAKING IT MATTER FOR OUR COMMUNITIES

As a purpose-driven company, we strive daily to do well by doing good. This guiding principle is what drives our commitment to social responsibility and giving.

# MAKING IT MATTER FOR OUR PEOPLE

“

I see it all around us through our culture, the way our team shows up for each other and always has each other's back. Our people and culture are the foundation of this organization.

ELIZABETH CHRANE,  
Chief People Officer





## INVESTING IN MENTAL WELLBEING

Mental health can affect every part of your life - from your job performance to your personal relationships and even your physical health. When we learned that 3 out of 5 of our employees were paying out of pocket for mental health services, we sprang into action.



My ultimate goal would be for mental health to be a topic that all families can discuss at the dinner table, without the stigma, and to normalize that conversation. Starting here at OneDigital, with our families, is a good start in my book.

**RAGAN FABRICI,**

Senior Vice President, Human Resources



## Mental Health FIRST AID

from NATIONAL COUNCIL FOR MENTAL WELLBEING



In addition, a quarterly learning cohort was launched utilizing the National Council for Behavioral Health's Mental Health First Aid Certification program, which centers around recognizing the signs of a mental health emergency and providing support. Each cohort filled to capacity almost immediately, resulting in over 75 team members' being certified.



I wanted to be better equipped to support those around me who might be struggling with mental health issues. Little did I know, I signed up for the course before a pivotal event in my life, and the training came at a perfect time to help me process my own experiences and support others.

**KATE STINSON,**

Corporate Marketing Coordinator



In 2024, OneDigital introduced Lyra, a benefit that gives our people and their families immediate access to in-person and virtual mental health professionals.

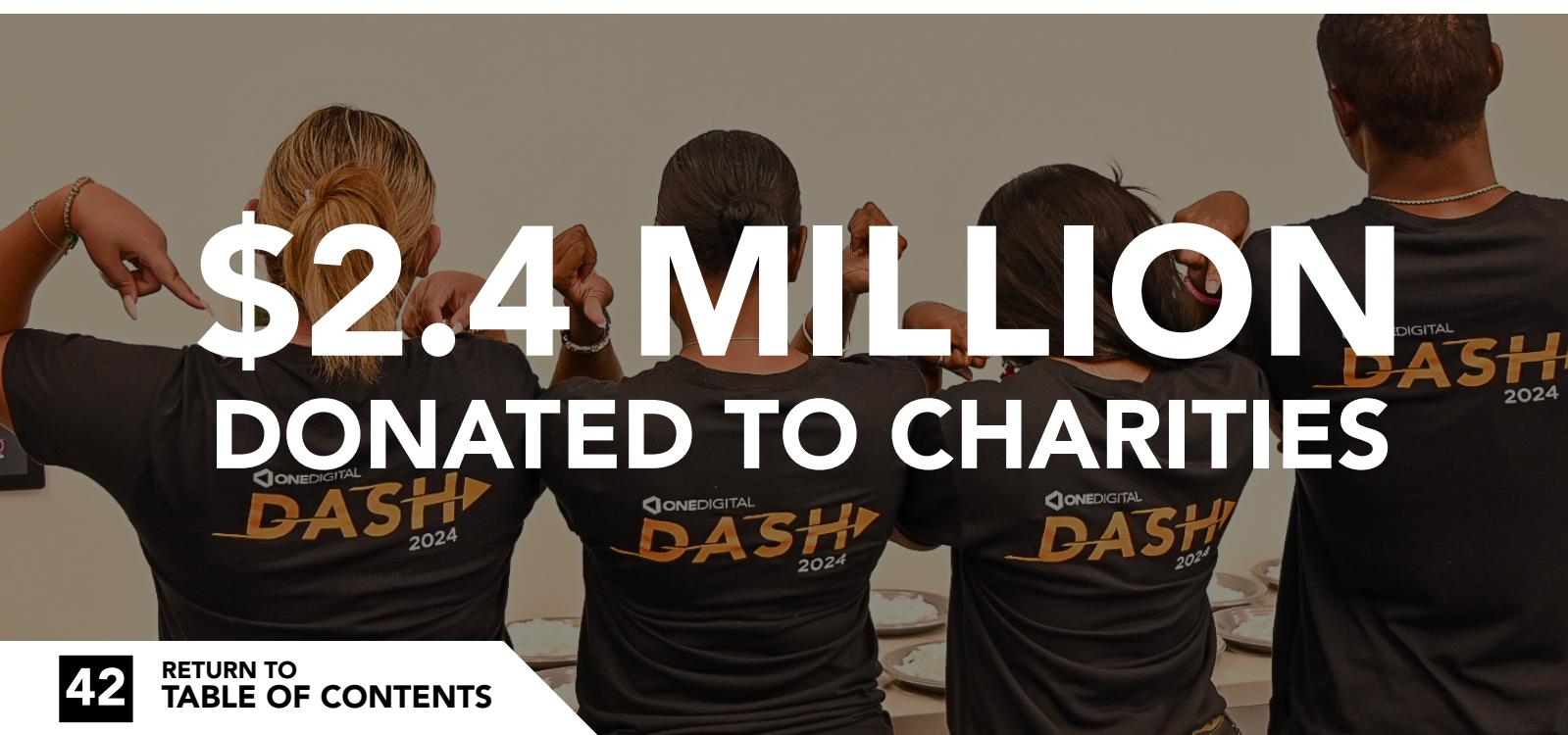


As part of our Leadership Speaker Series, President & CEO Adam Bruckman and Travis Dommert, Senior VP of Talent, had a candid conversation about stressful situations in their own lives. They shared how they are working to harness "good stress" to enhance productivity, and how they're stopping "unproductive stress" from disrupting their lives.



**ONEDIGITAL DASH RAISES \$182,000 FOR LOCAL CHARITIES**

Since 2009, OneDigital DASH has raised funds for community organizations and nonprofits. Our local teams participate in fundraising efforts to support organizations that are improving their region and community, with 50% of funds dedicated for organizations supporting DEI&B initiatives.



**\$2.4 MILLION  
DONATED TO CHARITIES**



**WE'VE GOT YOUR BACK FUND**

In times of unexpected hardship, knowing our people have a community to lean on can make all the difference. That's the guiding principle behind our We've Got Your Back Fund, a crucial initiative that extends a helping hand to our people facing unforeseen financial difficulties. By standing together, we can ensure that, in life's unpredictable moments, no one at OneDigital faces them alone.



24 grants were awarded to our people for situations ranging from domestic violence and serious injury to natural disasters and primary residence impact.

# G.I.V.E.

GIVE. INSPIRE. VOLUNTEER. ENCOURAGE.

**GIVE | INSPIRE | VOLUNTEER | ENCOURAGE** are the fundamental building blocks of our matching gifts program. When our people are personally connected to an organization that is bettering our communities, it's just as important to us! The G.I.V.E. program matches all eligible employee donations 100% up to \$500 per year with a total of \$66,000 donations matched.



## TEAMS RALLY FOR HURRICANE RELIEF

The Carolinas' spirit of making it matter in their community was showcased during the hurricane relief donation drive. Support poured in from markets up and down the Southeast and Northeast offering donations and supplies. Thanks to this grassroots effort, the Carolinas team was able to deliver upward of \$15,000 worth of goods to churches and Goodwill locations in Fletcher and Hendersonville, NC.



It's amazing to see the collaboration with other OneDigital markets, clients, and partners and really highlights the power of community in times of crisis. The commitment that this team has shown to advocacy and support is truly commendable!

**MARK MCLEAN,**   
Senior Vice President of Corporate Development

# OUR CHIEF PEOPLE OFFICER EMBRACES THE FUTURE

## WE ARE BUILDING FOR BETTER



As we've seen through these pages and witnessed every day with our people and culture, DEI&B is not just an initiative but the foundation of our core values. I'm so proud of what has gotten us to this point, and while we celebrate our progress, we realize that the challenge of strengthening a diverse and inclusive culture means that the work is never done. Through transparency, we hold ourselves accountable, and with data, we continue to identify the gaps and evolve our strategy.

**ELIZABETH CHRANE,**  
Chief People Officer



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