

2024 Diversity, Equity, and Inclusion Report

Coming Together to Advance I.D.E.A



“We continue to empower our employees and evolve our company through everyday actions.”



Welcome to the inaugural edition of our annual DEI report.

Everything we do at Lifetime Benefit Solutions is rooted in our seven core values, among which is “we model I.D.E.A.” (Inclusion, Diversity, Equity, and Access). This report is an intentional step toward greater transparency to showcase our efforts in this space.

We are proud to share some of the ways we continue to empower our employees and evolve our company through everyday actions to meet the changing needs of our people, our industry, and our world.

As an upstate New York-based third-party administrator with offices in Syracuse, Rochester, and Buffalo, and an expanding presence nationwide, we exist to help our clients by designing, developing, and deploying Reimbursement Accounts, COBRA, and other employee wellness-related plans that promote employee health while safeguarding their employer’s financial health. 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 are focused on well-being and cultivate a sense of belonging, it takes all of us working together.

Year over year, we build upon our commitment to I.D.E.A., continually striving to weave it into all that we do. But, we don’t 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. Together, we will create a healthier, more equitable, and vibrant future for all.

With gratitude,



Trish Mooney (she/her)

President



Sady Alvarado-Fischer (she/her/ella)

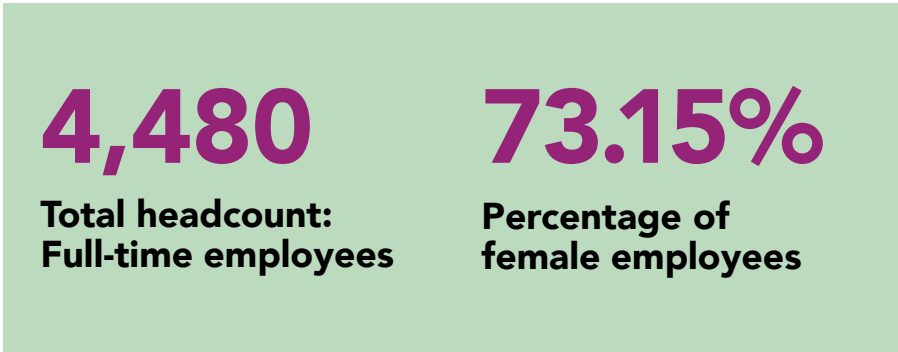
Vice President, DEI Officer



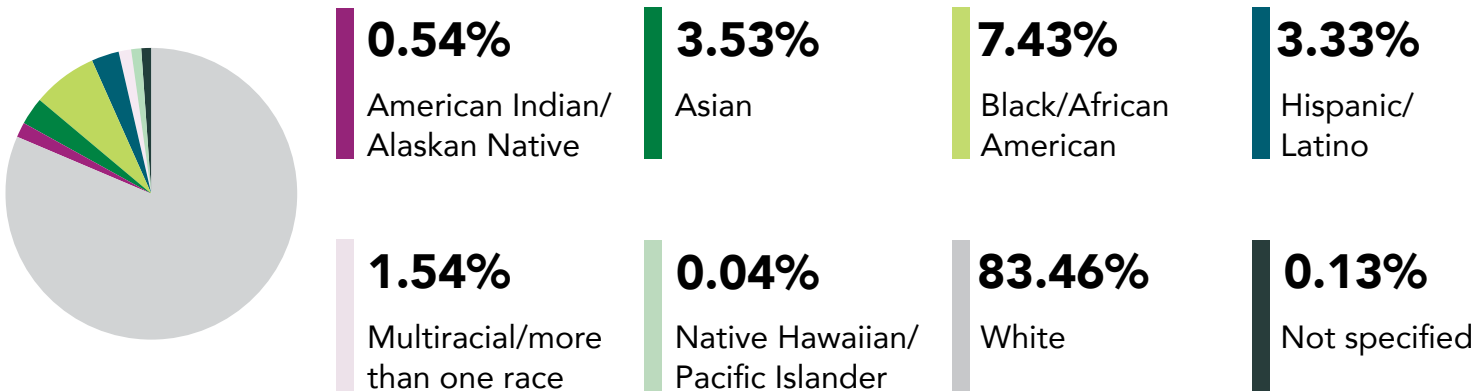
Together, we commit to employee diversity

Lifetime Benefit Solutions (LBS) is an upstate New York-based third-party administrator. It is an affiliate of a Rochester-based not-for-profit holding company that finances and delivers health insurance and other services across upstate New York and across the country.

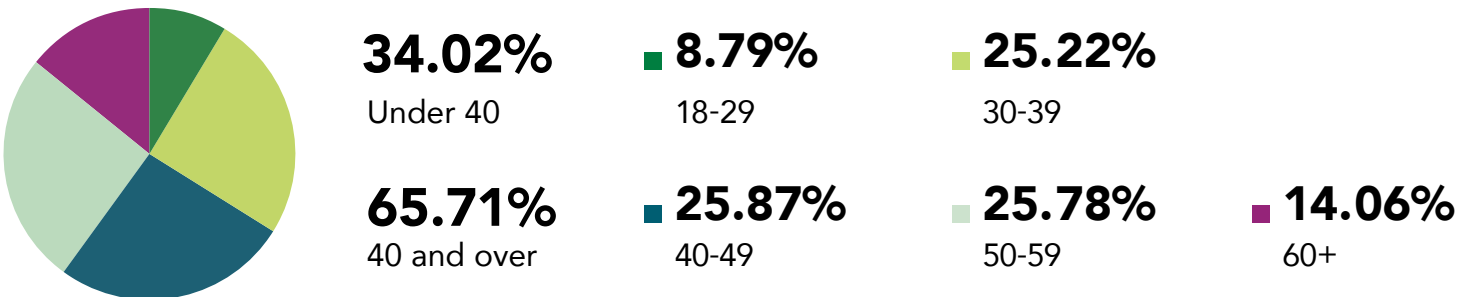
As part of our entire organization's commitment to I.D.E.A., we work to ensure that our workforce reflects the communities we serve. We continue to make progress and recognize opportunities for growth in the areas of internal mobility, development, and hiring. There is always more to be done.



Employee racial/ethnic breakdown



Employee age breakdown



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!).**

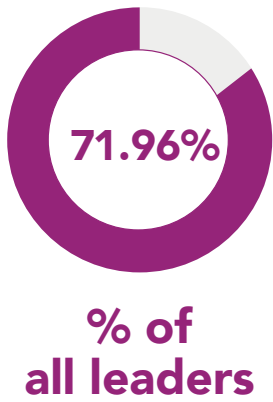


		2023	2022	2021
Agree that we are committed to diversity, equity, inclusion, and access		97%	94%	91%
Agree that senior leadership encourages diversity, equity, and inclusion		92%	91%	90%
Agree that we respect individuals and value their differences		94%	91%	88%
Agree that we are making progress with diversity, 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



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



12.15%

First-Level Management
(Supervisor & Manager)

11.96%

Mid-Level
(Director)

8.57%

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

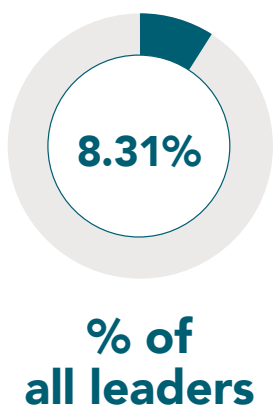
15.38%

Executive Leadership

26.66%

Board of Directors

Intersectional representation — female leaders of color



8.96%

First-Level Management
(Supervisor & Manager)

6.69%

Mid-Level
(Director)

5.71%

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

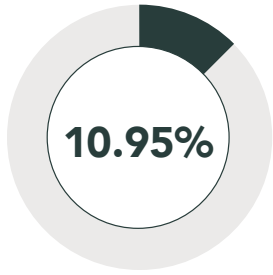
15.38%

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 is another way we reinforce our commitment to I.D.E.A. We send a daily e-newsletter to employees with the top things they need to know for that day, and a weekly e-newsletter to leaders that includes business-critical information. With each, we include updates on all of 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.

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.

31%

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



<ul style="list-style-type: none">• 7 Generations	<ul style="list-style-type: none">• Lifetime Pride
<ul style="list-style-type: none">• African American ERG	<ul style="list-style-type: none">• Open Door Alliance
<ul style="list-style-type: none">• Asian ERG	<ul style="list-style-type: none">• Veterans Network
<ul style="list-style-type: none">• Awareness of Visible and Invisible Disabilities	<ul style="list-style-type: none">• We Are One
<ul style="list-style-type: none">• Conexión	<ul style="list-style-type: none">• 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 for our corporate commitment to I.D.E.A.

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 of racial justice issues and attend any local Juneteenth celebrations.

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.

We continue 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 client experiences.

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

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

- Participating in Urban League's Interrupt
- Racism programming
- Having our leaders participate in the Eliminating Racism Group
- Sponsoring and participating in the following
- United Way programs:
 - » 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 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:

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

Also available and optional, along with the ability to write out names phonetically

Sharing self-identification information is always voluntary and a personal decision. 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)



“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)



“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 among 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)



"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)



"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)



"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)



"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)



Advancing our commitment to supplier diversity, together

As part of our commitment to DEI, we are committed to engaging, supporting, and leveraging our purchasing power with women and minority-owned businesses, and are collaborating with other organizations to explore strategies and share resources to help smaller companies grow. We are 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.

“This aligns with our commitment to diversity, equity, inclusion, and access to help people and businesses expand, thrive, and live more secure lives,” says LBS President Trish Mooney.

“Work is underway to better understand our supplier spending,” says Vice President and DEI Officer Sady Alvarado-Fischer. “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.



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