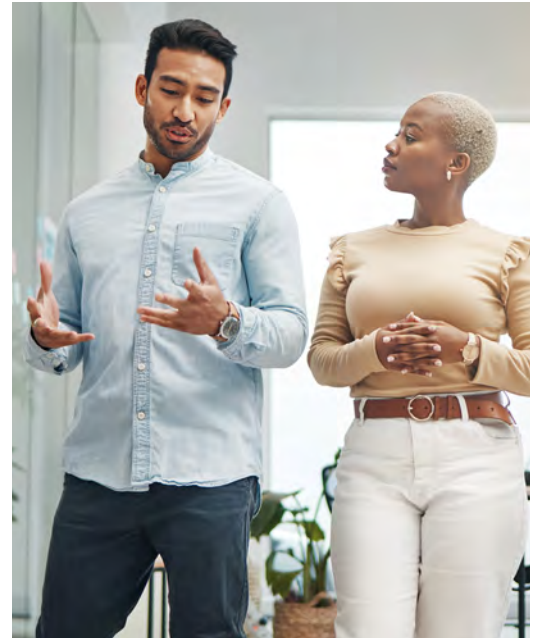




# Coming together to advance I.D.E.A.

2023-24 Diversity, Equity, and Inclusion Report





**“The dedication of our employees, leaders, members, and communities fuels our journey to create a healthier, more equitable, and vibrant future for all.”**



# Working toward greater representation

As part of our commitment to I.D.E.A., we work to attract and retain a workforce that is reflective of the members and communities we serve.

We measure progress and opportunities for growth in the areas of career advancement, development, and recruitment.



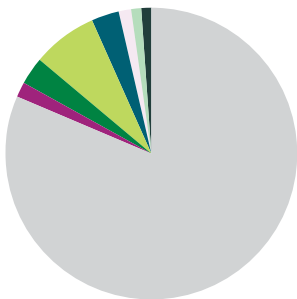
**4,386**

Total headcount:  
Full-time employees

**72.53%**

Percentage of  
female employees

## Employee racial/ethnic breakdown



**0.59%**

American Indian/  
Alaskan Native

**3.63%**

Asian

**6.99%**

Black/African  
American

**3.10%**

Hispanic/  
Latino

**1.78%**

Multiracial/more  
than one race

**0.05%**

Native Hawaiian/  
Pacific Islander

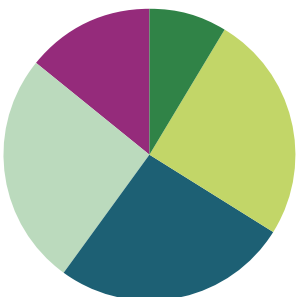
**82.17%**

White

**1.69%**

Not specified

## Employee age breakdown



**35.04%**

Under 40

**9.53%**

18-29

**25.51%**

30-39

**64.96%**

40 and over

**25.58%**

40-49

**25.88%**

50-59

**13.50%**

60+

# We commit to an inclusive, equitable, and accessible workplace

Our annual Inclusion Survey is one way we measure employee experience and progress in our DEI journey.

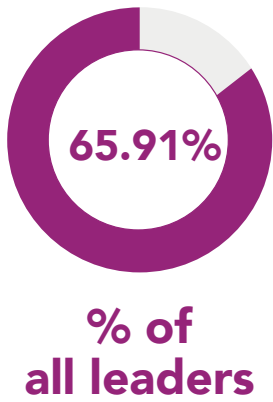
While increasing representation is important to us, we also understand that strengthening inclusion and belonging are just as crucial. Understanding how our employees experience I.D.E.A. at our company helps us measure the distance between our goals and their daily experience. This feedback not only lets us know where we are succeeding, but also informs our programs and continues to hold us accountable for driving change.

	2024	2023	2022	2021
Agree that I am comfortable talking about my background and cultural experiences with my colleagues if/when I choose to	87%	86%	84%	81%
Agree that we provide an environment for the free and open expression of ideas, opinions, and beliefs	87%	89%	87%	84%
Agree that senior leadership encourages diversity, equity, and inclusion	91%	92%	91%	90%
Agree that we are making progress with diversity, equity, and inclusion initiatives	91%	92%	90%	88%
Agree that we do a good job providing job training programs that promote multicultural understanding	91%	90%	88%	85%
Agree that we respect individuals and value their differences	93%	94%	91%	88%
Agree that we are committed to diversity, equity, inclusion, and access	95%	97%	94%	92%
Agree that I have the same opportunities for advancement as other employees in my organization	81%	84%		
Agree that DEI issues are openly discussed	85%	84%		

Each year, we add a few new questions related to a specific area of I.D.E.A. This year, our focus was on accessibility, with questions including:

Agree that I have the materials and equipment I need to be effective at work	93%
Agree that should I need an accommodation, I trust my manager would assist me with meeting my needs	95%

## Leadership — female representation



**70.94%**

**First-Level Management**  
(Supervisor & Manager)

**58.49%**

**Mid-Level**  
(Director)

**55.70%**

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

**53.85%**

**Executive Leadership**

**33.33%**

**Board of Directors**

## Leadership — racial/ethnic representation (non-white)



**12.38%**

**First-Level Management**  
(Supervisor & Manager)

**11.79%**

**Mid-Level**  
(Director)

**11.39%**

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

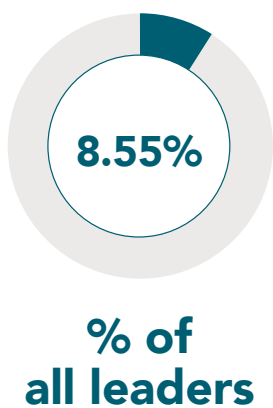
**15.38%**

**Executive Leadership**

**33.33%**

**Board of Directors**

## Intersectional representation — female leaders of color



**9.42%**

**First-Level Management**  
(Supervisor & Manager)

**6.60%**

**Mid-Level**  
(Director)

**8.86%**

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

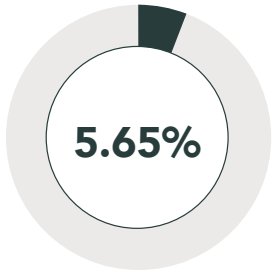
**15.38%**

**Executive Leadership**

**13.33%**

**Board of Directors**

## New hires (2024)



**% of employee population**

**65.73%**

**Female**

**20.56%**

**Racial/Ethnic Representation (non-white)**

**12.50%**

**Female and Racial/Ethnic Representation**

## Additional workforce representation

Employee self-ID demographics from Human Resources Information System

**2%**

**LGBTQ+**

**1%**

**Disability**

**1%**

**Veterans**

Employee self-ID demographics from 2024 Inclusion Survey participants

**11%**

**LGBTQ+**

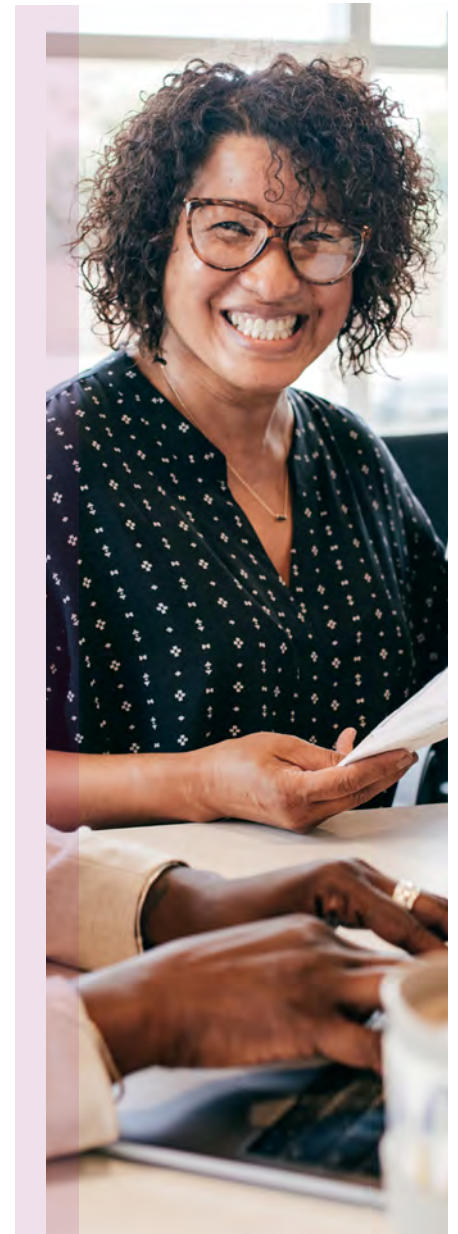
**11%**

**Disability**

**2%**

**Veterans**

\*At the end of 2023, we moved to a new Human Resources Information System (HRIS) which allowed us to capture additional LGBTQ+, Disability, and Veteran identities. We are actively working to close the gaps between the self-identification reported in our new HRIS and the representation in our annual Inclusion Survey.



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

## An ongoing commitment to learning and inclusion

We've long recognized that fostering an inclusive workplace isn't a one-time effort, but an ongoing responsibility requiring daily actions. Through a combination of educational programs, leadership development, and collaborative events, we are continually advancing our understanding and actions related to I.D.E.A.

### DEI Book Club

Begun in 2020 by two employees, and with leadership support, the DEI Book Club provides employees with a space to explore different perspectives and lived experiences, allowing for deep engagement, broad discussions, and strengthened connections. The Book Club tackles a wide range of topics, from understanding intergenerational dynamics in the workplace to discussing the experiences of indigenous youth in residential schools. This is just one of the ways we address intersectionality and create safety so that all voices are heard and respected within our organization.

**"Being a part of the book club has given me the opportunity to grow personally and professionally by allowing me to learn, understand, and think differently."**

- Michele D., executive assistant, DEI Book Club co-founder

#### Book Club picks:

- *They Called Us Enemy* by George Takei (2024)
- *American Like Me: Reflections on Life between Cultures* by America Ferrera (2024)
- *Indian Horse: A Novel* by Richard Wagamese (2023)
- *A New Kind of Diversity: Making the Different Generations on Your Team a Competitive Advantage* by Tim Elmore (2023)
- *Blind Spot: Hidden Biases of Good People* by Mahzarin R. Banaji and Anthony G. Greenwald (2022)
- *We Can't Talk About That at Work* by Mary-Frances Winters (2022)
- *Black Fatigue: How Racism Erodes the Mind, Body, and Spirit* by Mary-Frances Winters (2021)
- *Waking Up White (and Finding Myself in the Story of Race)* by Debby Irving (2021)



## Essential Habits program

Leaders of our organization play a critical role in creating an inclusive and safe working environment, which is why we invest in strengthening and developing essential leadership habits through our Essential Habits program. In 2024, our Essential Habits training focused on inclusive leadership, a vital component of living our company values. Leaders had access to self-paced learning modules that equipped them with the skills to lead with empathy, understand the unique needs of each team member, and apply practical tools for leading tailored 1:1s and team meetings. Complementing these modules, our Learning and Development team also offered virtual, instructor-led training that provided leaders with opportunities for deeper reflection and practical application. These efforts support our goal of shifting inclusive leadership from a theoretical concept to a consistent practice within our organization.

**“The Essential Habits inclusive leadership training has reinforced the importance of embracing and understanding diversity, equity, and belonging, and fostering an environment where all my team members feel safe, valued, empowered, and heard. Inclusive leadership isn’t just about setting expectations for others—it’s also about holding yourself accountable to these same values and behaviors. My hope is that by continuously applying these learnings, I have created a more cohesive, engaged, and high-performing team that benefits from the strengths and insights of every individual.”**

- Anna D., employee experience manager



## Employee Resource Group (ERG) events

Our ERGs provide our employees with meaningful connections, resources, and support for business and personal goals, while supporting our culture and strengthening our intersectional approach. In 2024, our ERGs offered our employees more than 45 learning opportunities to partner within our organization, and with community-based organizations beyond our walls. Examples of those include:

### **Suicide Awareness**

A collaboration between the 7 Generations, African American, Awareness of Visible and Invisible Disabilities (AVID), and Lifetime Pride ERGs, this virtual event highlighted the disproportionate impact of suicide on historically marginalized groups. The presentation featured insights from the Suicide Prevention & Crisis Service of Tompkins County, and provided valuable resources and education to help address this critical issue within our communities.

### **HerStory Speaker Series**

Hosted by the Women & Empowerment Network ERG, HerStory is an annual series of events that brings together women leaders from across the organization, from various backgrounds, to share their lived experiences. These discussions cover a range of topics, from career development and leadership strategies to personal growth and work-life balance. HerStory not only empowers women within our organization, but also fosters a culture of mentorship and support.



# 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:**

- **Digital accessibility** By breaking down barriers so all people – including those with disabilities – can access, use, and interact with digital resources effectively, digital accessibility helps us create a more inclusive workplace

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- **DEI Multicultural Learning Collection** Multiple self-paced learning modules throughout the year

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- Two **DEI-specific electives:** Inclusive Language Workshop and Working Across Multi-Generations

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- **Employee Resource Groups (ERGs)** that reflect the diversity of our workforce and provide meaningful connection, resources, and support to employees

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- **Sponsorship to complete Dale Carnegie Skills for Success Training** and Dale Carnegie High Impact Presentations

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- Free access to **LinkedIn Learning courses**

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- Internal **leadership programs**

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- Toastmasters program to help **enhance public speaking**

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- **Annual I.D.E.A. Series**, focused on cultural humility; welcomes subject matter experts on DEI-related topics

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- **Mentor and mentee programs**, including Advancing Diversity mentoring

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- **Internal coaching and insta-coaching**

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- **Tuition assistance** to access higher education

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- **DEI Book Club**

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- **Essential Habits training** twice per year for all leaders

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- Mandated all-employee training on **cultural competence and humility**

# 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 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:

### Listening to our employees to improve our I.D.E.A. efforts

We are proud to have been named a Best Place to Work for Disability Inclusion, with a top score of 100% on the 2024 Disability Equality Index, a national benchmarking survey by Disability: IN and the American Association of People with Disabilities. And we also recognize that 100% does not mean perfect. We continue to identify opportunities to close gaps and create more consistent experiences.

This year, we had an opportunity to incorporate live captioning at our Spring and Fall Leadership meetings. The original inquiry came from a member of our Awareness of Visible and Invisible Disabilities (AVID) Employee Resource Group and their executive sponsor connected with our vice president DEI officer and the project team. Though we have captioning available in our internal learning materials, this was a chance to incorporate it in-person and make this important event more accessible for the more than 700 people in attendance.

The project team, a multi-departmental collaboration with representatives from across the company, took on the task of identifying the appropriate software, testing, and implementation.

When we collaborate and increase access for some, we increase access for all.





## Recognized

Lifetime Benefit Solutions received a **2024 Gallup Exceptional Workplace Award**. We received this recognition for creating a workplace where employees across our organization are engaged, empowered, and proud of the work they do. To achieve this recognition, our organization met Gallup's rigorous standards of excellence and demonstrated how our business performance is fueled by an engaged workforce. The Annual Lifetime Way Employee Engagement Survey participation rate of 85% exceeds Gallup's criteria (80% or higher) and our overall engagement score of 4.40 places us in the 96th percentile of companies within Gallup's database.



## Reaffirmed

**Until Justice Just Is:** 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.



# Lifetime Benefit Solutions recognized as one of Central New York's Best Places to Work

Lifetime Benefit Solutions has been recognized as one of Central New York's Best Places to Work by the Central New York Business Journal. The recognition is based on confidential and voluntary surveys of employees that were distributed and tabulated by an independent survey firm retained by the Business Journal.

"Our employees' voices, their experiences, and their perspectives shape the very fabric of our corporate culture," says Lifetime Benefit Solutions' Trish M. "To know that they hold our company in such high regard is truly humbling."

Lifetime Benefit Solutions placed No. 6 in the competition among companies with 51-100 employees. It scored above the group average for its commitment to and adoption of diversity and inclusion practices, and the strength with which employees identify and live the values of the organization.

Lifetime Benefit Solutions, with offices in Syracuse, Rochester, and Buffalo, is an industry leading third-party administrator that designs, develops, and deploys Reimbursement Accounts, COBRA, and other employee wellness-related plans that promote employee health while safeguarding a company's financial health. Lifetime Benefit Solutions offers a full suite of ancillary benefits and specialty programs to help round out employers' traditional benefits. Each is built with scalability and flexibility in mind, providing added security to help both businesses and employees grow.

**"We've embraced a permanent hybrid work environment, empowering our team members to choose where they work best – whether it's in the office or from the comfort of their own homes"**

- Trish M., Lifetime Benefit Solutions

LBS leadership credits a workplace philosophy based on flexibility for the company's strong performance in the Best Places to Work in CNY competition.

"Additionally, we understand the importance of continuous learning and growth, which is why we offer a robust tuition assistance program to support our employees' professional development journeys," says Trish.

# Size inclusion: Looking beyond what's expected of DEI

While we continue to build upon our foundation of I.D.E.A., our employees help us to expand beyond the boxes in which many expect efforts of diversity, equity, and inclusion to belong.

When we think of inclusion, it means all of us. Body size is one aspect of diversity that is often overlooked, though it can carry societally based stigmas, biases, and stereotypes that impact all aspects of life.

In the last year, we are proud to have invested in both the creation and expansion of internal resources and learning opportunities for our employees.

## We work with our employees to champion change

A major catalyst was when Sarah S., claims analyst, was introduced to Sady A.-F., DEI officer, and they began a conversation about how body positivity could be integrated into the company's DEI work. They agreed that people of any size deserve a holistic, dignified, caring, and fair approach to their health care. The two then developed a plan to collaborate across various departments to incorporate size inclusion through multiple efforts, including:

The formation of a new **employee-led body inclusion group (BodyPosi)** where employees can gather and learn about positivity, acceptance, visibility, and support for all different body shapes and sizes.

The inclusion of body size diversity and inclusion in internal **Wellbeing learning modules** throughout the year, with feedback and content review from members of our body inclusion group.

The launch of a **new training module, Weight Stigma and Size Inclusion**, developed with input from members of our body inclusion group. The training addresses biases related to weight, the negative impacts to health outcomes for patients of size, and best practices to be size inclusive.

Fostering a better understanding of body positivity is important to the work we do – from personal relationships and work culture, to the health and wellbeing of our communities.

**“Weight stigma and discrimination is something that affects all of us, whether it has happened to us directly, or to a family member, friend, and those we cherish in our communities. People are dying from conditions that could have been prevented or treated, all because they are frightened, embarrassed, uncomfortable, nervous, self-conscious, etc., due to the everyday stigma they experience from many around them”**

- Sarah S., claims analyst





# Going beyond the traditional wellbeing program

Often, when we hear “health and wellbeing,” we attribute it to our physical state. But wellbeing is more than just getting a step count in for the day: Wellbeing is the state of being comfortable, healthy, and happy. It’s a combination of physical, emotional, mental, and financial wellbeing.

**As an organization, we know wellness can come in many different forms and isn’t the same for all. Our team is comprised of individuals who vary in terms of their social determinants of health, including income, education, and accessibility to care and reliable transportation, as well as unique needs based on their gender identity, race, ethnicity, disabilities, and other factors. Our employees have daily experiences that change the way their wellbeing is impacted, so we make it a priority to meet each individual where they are in their unique wellbeing journey.**

## 2024: Expanding our inclusive wellbeing strategy to create fair opportunities for all employees to live a healthy life

We continue to offer wellbeing programs that engage our diverse employee population, including virtual fitness classes and mindfulness classes. New in 2024, we added free access to a new wellbeing hub for our employees and their spouses who enroll in one of our medical plans. This wellbeing hub platform is a digital home base that helps people engage in healthier choices and build healthy habits.

Within the platform, our employees have access to:



A variety of wellbeing content



Coaching that supports everyone



Specific actions to address Social Determinants of Health



Assistance and guides for navigating the complex health care system



Users can connect to a fitness tracker and use the wellbeing hub to improve their physical wellbeing. But, we know that “getting more steps in” or going to the gym is not always attainable for everyone.

With this benefit, our team members can get content and support for a variety of things known to improve overall wellbeing, such as:

- Improving sleep habits for a better night’s rest
- Recognizing and overcoming burnout
- Setting a wellbeing goal
- Connecting with colleagues, friends, and family through wellbeing challenges
- Managing anxiety and general mood
- Improving gut health through diet
- Moving better while living with arthritis and joint pain

Plus, our employees with the wellbeing hub also gain free access to two additional resources in the platform:

- Headspace®: Focused on mental and emotional health, Headspace provides access to hundreds of meditations and exercises for stress, focus, sleep, and movement. It also has great accessibility features such as closed captioning, audio descriptions, and language options.
- Foodsmart: A digital nutrition platform, Foodsmart has tools that make it easier to eat well based on food preferences and cost.

**Our goal is to encourage healthy habit-building and cultivate better resilience** among our employees, no matter their circumstances. Building this into our benefits package helps make it more accessible to everyone on our team.

\*Headspace is a preferred partner of Personify Health, offering a meditation app to our employees through the wellbeing hub.



[LifetimeBenefitSolutions.com](http://LifetimeBenefitSolutions.com)