

WE CAN DO BETTER

DIVERSITY, EQUITY, AND INCLUSION

SCORECARD

ERS

Episcopal Retirement Services

2022 WCBD Initiatives

V2 - September 1, 2022

1. Launch campaign for Lauren Brown Empowerment Fund to support BIPOC staff members
2. Further expand inclusive recruitment practices to further increase diversity
3. Support ERS's current affinity groups with ongoing education and support

2021 to 2022 Successes

- First award of the Lauren Brown Empowerment Fund and raised \$130,000 from private donors and \$130,000 in planned gifts.
- Significantly increased Under-represented Recruitment Sources from 6 in 2021 to 32 in 2022.
- Increased diversity of BIPOC males as members of management team (2.5% to 8.97%).
- Staff turnover for BIPOC staff members is lower than company-wide rate (8.8% compared to 16%).
- Increased number of affinity groups from 1 to 3 in 2022.
- Offered the opportunity to add pronouns to email signatures

STAFF METRICS:

Total number of staff: 572	Women		Men	
	Q2 2022	Q2 2021	Q2 2022	Q2 2021
% Total of Underrepresented¹ Staff	Q2 2022: 49.34% Total		Q2 2021: 47.7% Total	
• % Black/Brown Staff	35.1%	35.0%	8.54%	8.0%
• % Hispanic Staff	1.71%	1.34%	0.57%	0.3%
• % Asian, Alaskan, American Indian and Pacific Islander Staff	1.14%	1.14%	0.38%	1.31%
• % More than One Race Staff	1.52%	0.59%	0.38%	0.59%
• % White Staff	40.04%	40.0%	10.63%	13.35%

HR METRICS

	Women			Men		
	Q2 2022	Q2 2021	Goal	Q2 2022	Q2 2021	Goal
% Underrepresented Managers / Supervisors	12.82%	15.9%	15%	8.97%	2.5%	5%
	Q2 2022: 21.79% Total			Q2 2021: 19.8% Total		
% Underrepresented External Hires	Q2 2022: 49.3%			Q2 2022: 12.3%		
% Underrepresented Promotions YTD	50% (3/6)	50% (4/8)	30%	16.67% (1/6)	0% (0/2)	30%
% Underrepresented Staff Turnover (without prn staff)	1.9%	4.8%	4%	0.95%	0.7%	4%
	8.8% compared to 16% company-wide					

# Under-represented Recruitment Sources ²	2022: 32 total (0 Veteran, 29 African American, 3 Latino, and 0 LGBTQ) Compared to 6 total in 2021	
% Total Interviewees identified as Underrepresented	2022 Q2: 60% out of 151 Interviews	2021 Q2: 14% out of 111 Interviews
# Active Affinity Groups	2022: 3 groups compared to goal of 3 for 2022	
# Underrepresented Staff Members with NG Leadership plan	2022: 75% (1 out of 4 active plans)	

RESIDENT METRICS:						
Indicator	Women			Men		
	2022	2021	Goal	2022	2021	Goal
% CCRC Underrepresented Residents	3%	2%	10%	2%	1%	7%
# CCRC Leads Who Are Underrepresented	8	1	30	6	0	30
% AL Underrepresented Residents	24%	17%	20%	11%	7%	10%
# Outreach and Ads Focused on Underrepresented Groups	2022: 6 2021: Not measured Goal: 10					

BOARD METRICS			
ERS Corporate Board			
	Female		Male
Gender One Identifies With:	38.9%		61.1%
	White		Black or African American
Race One Identifies With:	77.8%		22.2%
All Boards and/or Committees: for Members who responded to the survey and are on ERS Corporate Board, Other Boards ³ , and/or Committees ⁴			
	Female	Male	Other
Gender One Identifies With:	36.73%	63.27%	0%
	White	Black or African Am	Other
Race One Identifies With:	95.92%	4.08%	0%
	Yes	No	
Identify As A Person With A Disability:	2.04%	97.96%	
	Veteran	Non-Veteran	Current
Military Status:	12.24%	87.76%	0%

EXTERNAL METRICS:		
	2022	Goal
# Underrepresented or Woman-Owned / Led Business Partner	12	15
# of Veterans / Military Partners	0	2

REFERENCE NOTES

- ¹ Underrepresented is defined as self-reported Black, Brown, Hispanic, Asian, and LGBTQ persons
- ² Sources include Black, Brown, Hispanic, Asian, LGBTQ, and Veteran groups
- ³ Other Boards Include: ERS Board, ERS Foundation, ECH Board, ECH Foundation, & AL Board
- ⁴ Committees include: Finance Committee, Strategy Committee, Personnel Committee, Leadership / Nominating Committee, Investment Committee, Marketing Committee, Fund Development Committee, and Corporate & Healthcare Compliance Committee.