



# Diversity, Equity, & Inclusion

Annual Report 2024

*Together, we: spark awareness,  
deepen belonging, & fuel change.*





# “We’re so proud of the progress we’re continuing to make year after year.

As we’ve always said, DEI is a journey, and we’ll never be “done” when it comes to making our firm more diverse, inclusive, and equitable.

And we’ve had so many milestones on our journey, from starting our DEI Council more than 20 years ago and increasing the number of staff who meaningfully participate in our programs and activities every day, to making changes that positively impact our staff’s experience.

You’ll read about some of our staff in the following pages as well as the programs and initiatives they’re advancing. One exciting stat? From FY22 to FY23, we increased the representation numbers of our racially diverse staff by nearly 20%. This figure, alone, is indicative of our progress. You’ll also discover more about what we’re doing in our communities and how our staff resource groups continue

to nurture a culture of belonging, as well as see the various ways we’re holding ourselves accountable to continued forward progress.

As we enter our 100th year of serving clients, we’re living our values by continuing to find opportunities to grow, learn, and support one another — to constantly expand how we bring people into our culture in a way that’s open-minded and respectful. We’re embracing our principles in our actions and through our DEI initiatives — providing the ideas, opportunities, and guidance to help us continue to create a shared sense of belonging among all of our staff. 2023 was an exciting year — and we can’t wait to see what the future has in store and what our talented staff can achieve.



Jim Proppe, Firm managing partner



Jason Drake, Firm managing partner-elect

*Together, we’re matching intentionality with accountability to make Plante Moran a great place to work for all.”*

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ACTION

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# Community

## Thousands of students will soon become familiar with Partner Paul Bryant

Starting this year, thousands of students will engage with Paul Bryant, our partner of advocacy, equity, and engagement, as part of their accounting curriculum. How? Publishing company McGraw Hill is working on a video supplement to their accounting textbooks, which are used at nearly 2,000 colleges and universities across the nation, and they asked us to speak on DEI since they've noted our strong culture supports this work. Because Paul's role is designed to engage with students across the country to enhance their interest in the accounting field, he's the perfect Plante Moran spokesperson for the video.

## DEI Leader Hawzien Gebremedhin emphasizes DEI as a need-to-have

DEI is a journey that makes organizations stronger if they hold themselves accountable — at all levels — and keep at it every day. That's the message Hawzien shared with Accounting Today in an article from late 2023. She noted that an important place for internal accountability is in your core values, which ultimately carry over to your culture. For example, last year at Plante Moran, we updated our foundational Statement of Principles to include the Principle of DEI to demonstrate our intentionality. [Read more](#) about Hawzien's suggestions for connecting DEI initiatives to accountability here.



Patty White and Kelly Turner

## Marketing's DEI leaders share wins with the ANA

Many marketing teams today understand how and why to message DEI in their external campaigns. However, they might not always consider DEI integration internally. This can lead to inauthentic environments and teams that lack true inclusion and equity.

Over the past few years, we've seen our marketing DEI committee make significant progress in this space. They heard the call for change and, from the ground up, created a successful, purpose-driven DEI initiative within their team. Because their efforts have been so successful, senior managers Kelly Turner and Patty White were asked to speak at the Association for National Advertisers (ANA) DE&I Forum on the founding of the marketing DEI committee. They shared how they recognized and leveraged their resources, secured top-level buy-in, and grew the initiative into a force that's actively transforming our marketing team's DEI efforts, authentically, from the inside out.

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# COMMUNITY



## Former Managing Partner speaks on DEI panel

During “Just Lead: Advancing Racial Equity, A New Detroit Conference, Detroit equity leaders talked about the business case for and their experience with DEI and racial equity. Our Former Managing Partner Gordon Krater participated in a panel where they discussed challenges igniting cross-cultural relationships and vulnerability in DEI work.

“The biggest challenge is ignorance,” says Gordon. “I don’t mean intentional ignorance; it’s just a lack of information. I know that I’ve experienced this. I’ve seen others experience it — where you’re afraid to say the wrong thing. You’re afraid to sort of step in it and offend somebody, or all of a sudden, you’re labeled as something when that’s not at all what you meant. I experienced the fear of that — people have granted me grace, so that’s been very helpful in my personal growth. But I think encouraging situations, encouraging gatherings, encouraging training — whatever it is where you have people together and you have to deal with being vulnerable. I think that’s where the growth really happens and the healing happens, too.”

## DEI leaders speak at 2023 Illinois Venture Capital Association CFO Summit

Research shows more diverse and inclusive companies are more innovative and, therefore, more profitable. We’ve seen this firsthand: diversity is good for business. And a lot of our momentum in this space is because DEI leaders have helped us along. In fact, it’s being noticed. This is why a few of our DEI leaders were asked to present at a summit for CFOs this past fall. [Paul Bryant](#), partner of advocacy, equity, and engagement; [Deanna Chang](#), assurance principal; and [Ashley Parker-Ozier](#), senior DEI consultant, presented on “DEI: Building an enduring firm culture.” They discussed why DEI is critical, steps for developing an actionable DEI strategy, and how to overcome common challenges.

“Many folks at the event expressed they were feeling a bit of DEI fatigue but felt reenergized after the presentation,” said [Partner Greg Rief](#), an attendee at the event.

*“It was one of those moments that made me really proud to be a member of our firm.”*

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## Veterans SRG supports the Gary Sinise Foundation

As a way to celebrate and honor our veteran staff members, clients, family, and friends, the Veterans SRG held a fundraiser to benefit the Gary Sinise Foundation. Folks could buy a Veterans SRG-branded T-shirt or make a donation without purchasing the shirt. The Gary Sinise Foundation was chosen because they support our nation's defenders, veterans, first responders and their loved ones, while upholding the importance of keeping our country strong by taking care of those who serve.



## Unidos brings resources and fun to schools

Members of Unidos, our SRG that supports our Hispanic staff and allies, volunteered with Bridgepointe, a nonprofit that provides educational and social support to children at all grade levels for their Career Day. They staffed a booth and provided career advice to students at Academy of the Americas.

Unidos members also had a blast volunteering for Field Day at Neinas Dual Language Learning Academy. The Plante Moran team facilitated the obstacle course races and parachute activity. This was a great opportunity to celebrate these students who worked so hard throughout the year.

## Plante Moran Pride waves their flag for the HRC

Since 2021, Pride's fundraisers have raised more than \$15,000 for LGBTQ+ charities, and they're proud to continue to support those who still suffer from discrimination and violence. Their 2023 T-shirt fundraiser brought in more than \$4,000 to benefit the Human Rights Campaign (HRC), an LGBTQ+ advocacy group.



## AA SRG brings Plante Moran's "We Care" spirit to schools

The back-to-school season can be stressful for schools that don't have as many resources as they'd like to support students. Thankfully, the AA SRG stepped up in a big way. For Dossin and Emerson Elementary-Middle Schools, they volunteered at a back-to-school rally, painted several bathrooms, overhauled a classroom to revitalize it into a reading lab, and showed up for monthly classroom readings. They also provided donations to other schools in Michigan and in Colorado.



## Wealth Management team rolls up their sleeves

The Ann Arbor Wealth Management team spent a weekend helping to clean up the Ozone House's riverfront property in Ypsilanti, Mich.

Ozone House is a nonprofit that provides housing, support, intervention, training, and assistance to runaway, homeless, and high-risk youth and their families.

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## Meet Laura Claeys, *DEI Council management team sponsor*

*"As the liaison between our numerous DEI leaders and the management team, I help ensure we're being thoughtful and considerate of our staff as we continue to advance our DEI efforts. It's a role I really enjoy – because this work is all about our people. Ensuring our people feel heard and supported benefits the whole firm and extends to how we treat our clients."*

*"I've been so energized by how much people pay attention to, and are interested in, this work. To me, it highlights the importance of being intentional in this space. There's so much personal attachment to the work we do with DEI at the firm since we're talking about people's identities and how we're seen in the world."*

*"I'm proud of the way Plante Moraners look out for and support one another. Our 'We Care' culture is intertwined with our DEI efforts. I'm also excited about how many people participate in SRGs and the number of times people speak up and say they want to start a new group or get more involved with the DEI work. It's evident they feel safe and care deeply about their colleagues."*

***"I feel a great responsibility since DEI is an important, emotional, and personal topic to many people, so I want to do it right."***

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# COMMUNITY



Fortune's "100 Best  
Companies to Work  
For" in America

Best  
Workplaces  
for Parents

People magazine's  
"100 Companies  
that Care"

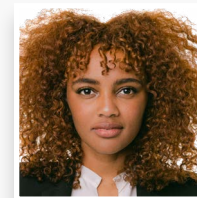
Best  
Workplaces  
for Women

Best  
Workplaces  
for Millennials

Best Workplaces  
in Consulting &  
Professional Services

[Read more about our other firm awards here.](#)

## We're making a difference



The Denver Business Journal recognized [Hawzien Gebremedhin](#), our DEI leader, with a [DEI Award](#). This award honors the businesses and leaders from metro Denver who are going above and beyond to embrace equality in their workplace across all areas of diversity, including age, disability, gender, sexual orientation, race, and religion. Hawzien was one of only 10 leaders to receive this award in 2023.



Crain's Chicago Business recognized international consulting practice leader and partner [Lou Longo](#) on its 2023 list of [Notable Leaders in DEI](#). The list features top Chicago-area executives who have made significant contributions to diversity, equity, and inclusion in their organization and/or the Chicago area.



Crain's Detroit recognized [Paul Bryant](#), partner of advocacy, equity, and engagement, in its 2023 list of [Notable Leaders in DEI](#). This group of DEI leaders was selected for doing the work to help people have impactful conversations (even if uncomfortable), implementing creative and effective trainings, and focusing on equity and justice in their communities.



Plante Moran Managing Partner [Jim Proppe](#) was recognized with a [Leadership Award](#) from the Detroit Free Press. Jim is one of only three leaders on the [2023 Michigan Top Workplaces list](#) to receive this award, which is driven by staff feedback. In the Michigan Top Workplaces survey, staff were anonymously asked to rate their "confidence in the leader" of their organization.

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# Belonging

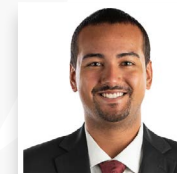


## Staff resource groups



Staff resource groups (SRGs) are an essential platform for building a deeper sense of belonging and inclusion throughout our firm. Though they operate independently, they all have a similar vision: to help our staff be seen, heard, and supported.

## Hear from SRG members



Jordan  
Hill

### African-American SRG

*When I went to my first meeting, I instantly knew this was something I wanted to be a part of. I saw a group of people who identify as African-American and allies of the group come together and be a family. As a man of color, I've felt nothing but accepted and included. And being in this group has taught me a lot. I now know when it's my place to teach and when it's my place to listen. I don't need to bear the responsibility of teaching everyone how to respectfully interact with others who aren't like them.*



Hajrah  
Ghumman

### Asian-American & Pacific Islanders SRG

*As a member of the AAPI community, I get an opportunity to connect with not only people with similar backgrounds and cultural values, but also people from all over the firm who are willing to learn and share their experience. My hope for the SRG is to provide a safe place to be vulnerable and a source of empowerment. I'm excited to celebrate our cultures and embrace our uniqueness.*

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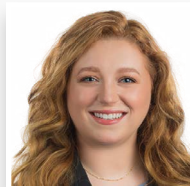
# BELONGING



**Kaitlyn  
Powers**

## Minds of All Kinds (MOAK) SRG

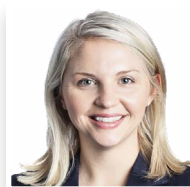
*My daughters are both neurodiverse, and I saw this group as a way for me to connect with others and learn more about their diagnoses and other important topics like mental health. Going through this neurodiversity journey with my kids has really helped me to advocate for inclusivity for all and want to learn more about others' journeys. I encourage us to embrace and celebrate our differences.*



**Emily  
Miller**

## Pride SRG

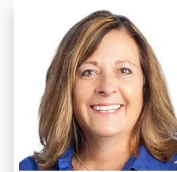
*For me, joining Pride was really about finding my community at the firm. I love my team and department, but I wanted to have a group of other queer people and allies to talk about issues both inside and outside of the office that can impact us day to day. It's great to have a group of people who really understand your point of view and feelings.*



**Hillary  
Radcliff**

## Satellite SRG

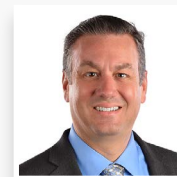
*As a remote staff member, sometimes you can feel left out of opportunities to casually meet new people at work. It's great to have a way to meet other staff members and find camaraderie with people who are having the same experience. I've made some great new connections with other remote staff, and I'm excited to see the group grow.*



**Leslie  
Syniec**

## Unidos SRG

*I hope our staff keep in mind they never know what someone's background is and what groups they identify with. I'm a good example of that! Having been a member of Unidos from the beginning, I enjoy watching it grow. I'm looking forward to learning more about our cultural differences and helping to foster a safe space for the members to have open discussions about their experiences.*



**Craig  
Zampa**

## Veterans SRG

*I feel like the purpose of an SRG is to bring us into a microcommunity. And our community includes staff who have served or who were impacted by a veteran family member. The Veterans SRG is the most aligning community to my heritage, culture, and history. I'm thankful that we could uncover such a community as it is one of the few that's related to a decision people made rather than a community into which they were born.*

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# BELONGING



Mumbai, India, ESS team



JP Morgan Corporate Challenge event



Donuts in Denver



Pride ally, Lou Longo



Women in Leadership golf outing



Monterrey, Mexico, hiking weekend



Marketing Topgolf event

*Throughout the year, teams across the firm participated in activities that celebrated our differences, increasing our sense of belonging.*



Marketing baseball game outing



Unidos outing



Track program team outing



AAPI SRG Topgolf event



AA SRG Thanksgiving celebration



Veterans SRG golf event

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# BELONGING

## “Whole person” Spotlight



### DEI Leader Hawzien Gebremedhin returns to her Tigrayan roots

“At Plante Moran, bringing my ‘whole self to work’ includes bringing the stress and pain of not being able to see or hear from many of my family members trapped in Tigray, Ethiopia, which has experienced three years of war and genocide. I’ve shared my struggles with my team, and I’ve been extremely thankful for the people at Plante Moran who have made me feel heard, supported, and cared for.

“In August, I was able to use the firm’s generous paid-time-off to visit my homeland of Tigray, Ethiopia. After 12 years away, it was amazing to spend three weeks with my family. Though much of Tigray remains war-torn, going back to my home after so long is an experience I’ll never forget. I’m so grateful to work at a company that not only cares and supports the work I do at the firm, but they care about me as a full individual.”



Hawzien with her family at one of the five feeding centers supported by her nonprofit, [Tigray Action Committee](#). Tigray, a region recovering from a devastating war and famine, has a significant ongoing humanitarian crisis. The women and children in the picture are a few of the hundreds of beneficiaries supported by their nonprofit.



Hawzien stands in front of the Hawzen monument located in Tigray.



After climbing Tigray’s “church in the sky,” Hawzien is greeted by the local monk who protects the church.



Standing in the middle of Mekelle’s stadium, Hawzien is adorned with the traditional Tigrayan jewelry and dress celebrating Ashenda, Tigray’s annual holiday celebrating women and girlhood.

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# Action



## The power of showing up

*“Since I stepped into this role a year ago, I’ve had the unique experience of leaning into it for the betterment of our recruiting and retention efforts — and I love what I get to do. Along with other firm leaders, I talk to students as young as high school who don’t know what it means to have a career in professional services. We find creative ways to help them understand our profession. I also have the joy of working with campus recruiters who believe in the power of showing up. We engage with college students whom we hope to tie into our internship programs. And we connect with deans and professors who want to give their students opportunities.*

*We’re also continuing to engage with the many minority-serving institutions in our country, which takes a lot of time and effort — but it’s worth it. I’ve met with several leaders at different schools and I’m hopeful about growing our relationships over time. They want to know that Plante Moran is serious about offering experiences and career paths to their students, and I’m showing them that we are.”*

**Paul Bryant**, *Partner of advocacy, equity, and engagement*

*“Together, we can change the firm, and the industry, for those who are coming behind us.”*

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## Exceptional Academy

Based in southeast Michigan, Exceptional Academy is a one-year program that offers Cisco certification and cybersecurity and network training for adults with autism and related challenges. Earlier this year, Mike, a cybersecurity director, mentored Wil, a student in the program. During Wil's internship and temporary job arrangement, Mike saw Wil's passion for cybersecurity and tech grow. So when a position opened up on his team, he offered Wil a full-time position.

In Mike's words:

*"I love the Exceptional Academy's purpose. It's great getting to know the students and supporting them. Without programs like this, these neurodivergent students can fall through the cracks."*

## Elevating future leaders

We partner with the National Association of Black Accountants' Accounting Career Awareness Program in different regions. One particular venture we've worked on is a summer camp for future accountants. Through our partnership with the Ohio CPA society, we sponsored their CPA Camp, designed to help underrepresented high school students looking to pursue a career in accounting. Students have the opportunity to meet staff from local firms, learn more about careers in the accounting industry, and earn academic scholarships.

## Michigan Association of CPAs Partnerships

It's no secret that the amount of young people entering the accounting profession is on the decline — especially when it comes to racially and ethnically diverse talent. This is why Paul Bryant is committed to educating racially diverse students on why accounting and related fields could be attractive long-term career choices.

For example, Paul collaborated with Kathleen Boeve from our campus recruiting team on a partnership with Michigan State University and the Michigan Association of CPAs to expand an established leadership program for racially and ethnically diverse high school students. They brought students from five different high schools to MSU to hear from accounting professors, MICPA leaders, and Plante Moran staff. The goal was to not only introduce the students to accounting and the opportunities it can offer, but also to help them understand how they can achieve a career in the profession. Feedback from the university and students was fantastic — so much so that we're working to replicate this event at other colleges and universities in conjunction with other state societies.

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## Meet **Kathleen Boeve**, *Campus recruiting manager*

*"I've always been dedicated to connecting with different identity groups on the campuses where we recruit. So once I became a campus recruiting manager, it was a natural evolution to focus on DEI. I help ensure all campus recruiters are thinking about diversity and inclusion, and I consider how it all aligns with the firm's DEI strategy so that we're all working on our campus recruiting goals."*

*"It's important to me to help folks find their home at the firm. I want students to understand what a sense of community would mean when they join Plante Moran — because anyone can belong and succeed here. Whether through SRGs or other support systems, we can help them with professional development goals, networking, hard and soft skills, and more."*

*"A big part of recruiting students is letting them know we have the resources that will translate to a solid, personable experience here."*



Kathleen represents Plante Moran at the Michigan State University Evans Scholar House.

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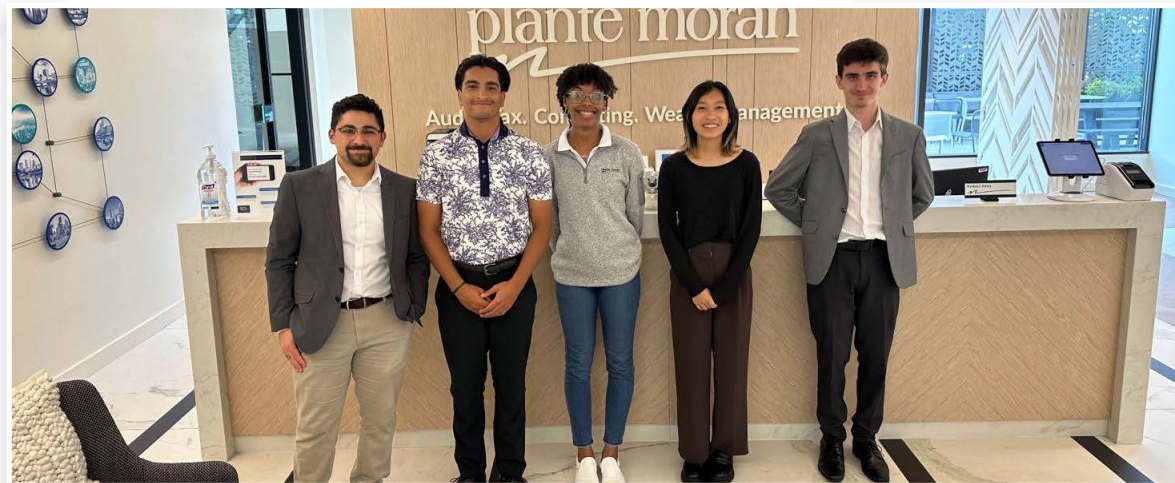


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## Track redesign a smashing success

Plante Moran's Track program is a multiyear leadership and internship program designed for racially diverse freshman and sophomores. It used to be more of an educational, exploratory program, presented similar to a lecture and took place over a period of weeks. However, the feedback we got was mixed; some students commented that it could be more interesting and that they didn't get enough opportunities to "get their hands dirty." We knew we had to level up the experience — and our campus recruiting team oversaw that transformation.

The freshmen Track program, called Track Leadership, is now offered as a three-day, all-expenses paid experience in Chicago. Students meet our staff, learn about our service and industry groups and, on the last day, interview for a full Track Internship the following year. The program saw a 72% offer acceptance rate for those in Track Leadership to return next year for a Track Internship (compared to a 27% acceptance rate the previous year.)



Track 2023 participants

In the Track Internship program, sophomores participate in hands-on engagement work over the course of six weeks where they are exposed to many of the people and experiences that they'd encounter as full-time staff. Ideally, these students would come back for the traditional internship (at the junior and senior level) the next year.

The latest feedback? It's a "smashing success" according to students and staff. Both cohorts noted there was more learning, more fun, and more real-world experiences than anticipated. And, Plante Moran extended next-year internships to more students than previously planned. A win-win for the students and the future of the firm.

## Expanded recruiting relationships

Historically, we've recruited from large, four-year universities throughout our footprint. And while no one will argue that we find top-notch talent there, we realized that we were leaving other great resources untapped — specifically, community colleges and smaller HBCUs (historically Black colleges and universities). Our expanding partnership with Jackson State University, an HBCU based in Jackson, Miss., is one of our most recent examples of expanding our recruiting relationships. We're working to deepen relationships like these to help us diversify our growing talent base. We've found many of these students have family ties in geographies where we have offices, which increases our chances at successfully recruiting them to the firm.

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## DEI: It's for each person and every office

*"Paul Bryant and I are gradually making our way to all of our U.S. offices. We've found that these visits help show staff that DEI is an area anyone can get involved with. These visits look different for offices depending on their size, needs, and other factors, but our time in the office includes a DEI data review meeting with our partners and principals and open office hours where Paul and I are available for questions. Usually they want to know how to get more involved or they want information on our available SRGs. We've also facilitated trainings on DEI topics, such as inclusion, microaggressions, and allyship."*

*"We've been able to deliver this content in a way that allows people to be open and receptive. Paul and I both have a way of gaining buy-in because we're not giving fluff, and we're empathetic to where people are in their DEI journey, which allows them to lean in and connect with what we're saying. It's rewarding when they can identify with our messages and have a lightbulb moment — when they realize how critical they are in our DEI efforts and the impact they can have on someone's sense of belonging at the firm."*

**Ashley Parker-Ozier**, Senior DEI Consultant

*"We're empathetic to where people are in their DEI journey..."*

### DEI leadership collaborates for the greater good

Offered to a varying group of SRG champions, DEI Council members, and partner sponsor leaders in various roles across the firm, the purpose of our first ever DEI Leadership Retreat was to build synergy between and across our different DEI leadership groups in the firm. In addition to team building and networking, this was an opportunity for our staff and partners to get together in person to have authentic conversations, learn more about different DEI roles at the firm, understand allyship in the workplace, share best practices, and identify ways to support groups with and without firm representation. One big takeaway was the idea that fostering allyship and inclusion takes buy-in from all staff at the firm — not just those in DEI spaces.

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## Be the change you want to see.

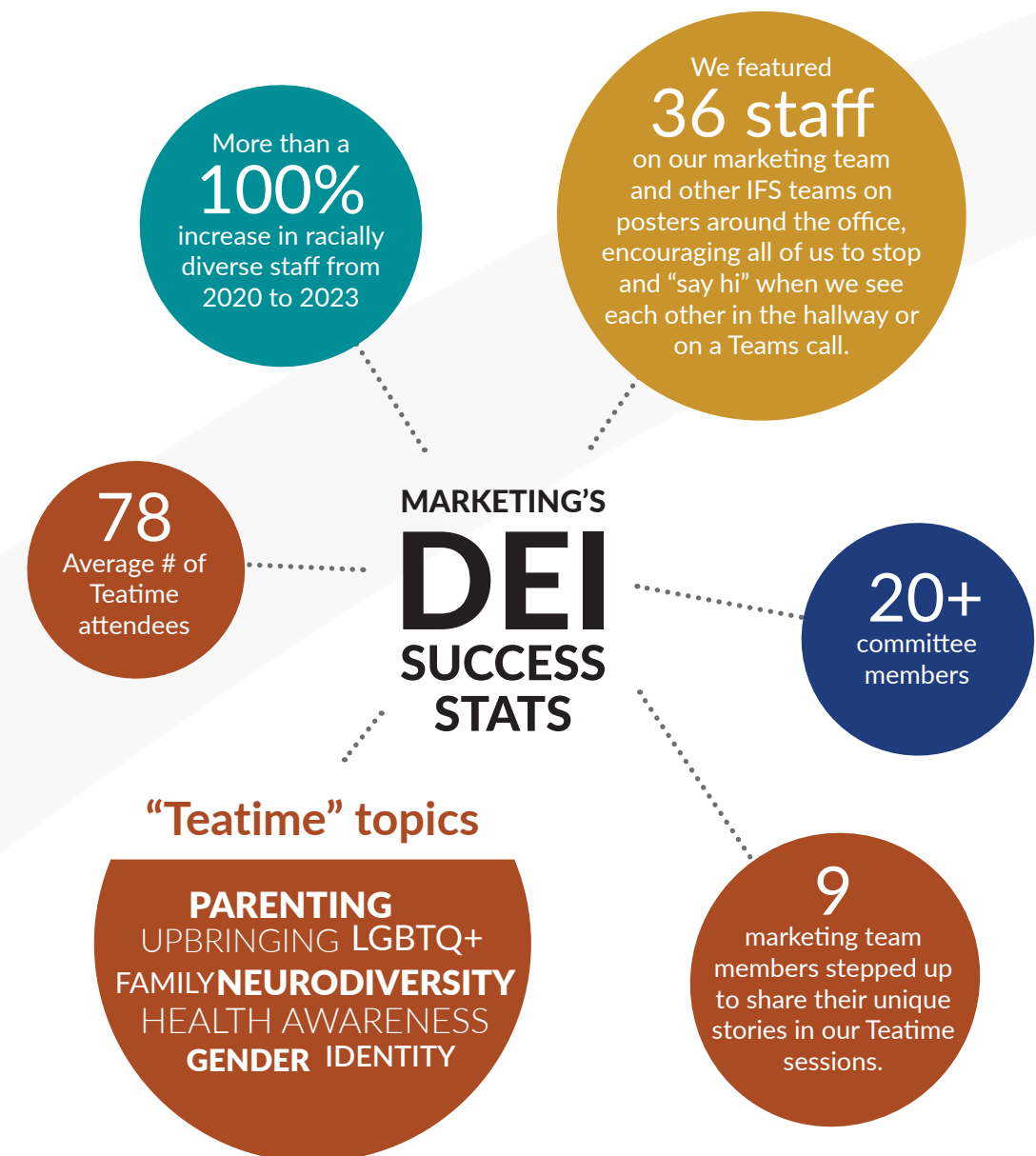
In the fall of 2020, the marketing team set out to improve the team's DEI efforts. With the support of Chief Marketing Officer Marten Van Pelt and firm DEI leader Hawzien Gebremedhin, the marketing DEI committee was created.

One of the team's first big changes was developing a way to help ensure equitability in interviewing practices by alleviating biases — and then training the leadership team to ensure consistency in interviewing across the department.

"Our process ensures that candidates are evaluated on the exact same criteria," says Kristin Lynn, a senior manager on the marketing team. "It also ensures that candidates are evaluated on the exact same criteria. It also keeps the interviewer from forming an unintentional bias for the candidate due to attributes not important to the role, for example, having similar taste in music or being from the same town."

The team started growing in 2021 and now includes more than 20 members who have designed new initiatives and changes for the department, including:

- **Monthly "Teatime" sessions** to give team members a chance to share their journey, experiences, and perspectives *"so we see our colleagues as a whole person, learn about the differences that make us unique, and celebrate that uniqueness,"* says one member.
- **"Togetherness" posters** that feature new staff members each month so that staff can get to know their teammates better and highlight diversity in the department. These posters originally featured only marketing staff members but have expanded to feature staff from all internal firm services.
- **Bimonthly content club** that provides a discussion platform that connects marketing staff with content from diverse creators and expands on their DEI learning journey.
- An annual **marketing-specific DEI survey** to collect anonymous feedback from the department. The committee gets the raw data and takes the insights from the survey to create action items and new initiatives.



*Because of the help of the committee's initiatives and the work of the entire department, the firm's U.S. marketing team increased ethnically and racially diverse staff by more than 100% from 2020 to 2023. And their plans keep growing as well — to include more trainings and initiatives to implement their findings from the DEI survey.*

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# Accountability

## First DEI survey leads to partner-focused training and more

Last summer, Plante Moran partnered with [The Equity Project](#) on our first firmwide DEI survey. The goal of this survey was to gather anonymous feedback from all staff and partners so we can better understand everyone's experience at the firm. This will influence how we approach future DEI initiatives. While it takes time to sort through the data and frame next steps, we're learning what we're doing well, identifying gaps we were unaware of, and starting to understand how we might create and deliver future content.

One outcome of the survey was a desire for more DEI training for our partner group so, in November, we launched new partner training in partnership with The Equity Project. The training explored the historical contexts of diversity, equity, and inclusion; took a deep dive into DEI fatigue; and looked at ways our leaders can better foster inclusive environments. This was the first of many training sessions planned over the next two years.

## Expanding the limits of our language

Words matter. From how we greet each other and which pronouns we use, to the way we strive to pronounce someone's name correctly, language can be an incredibly effective way of making people feel seen. It's important to hold ourselves accountable for the words we use. So, as part of our continuing DEI journey, we introduced our Language of Inclusion series in January.

We're helping staff learn about different communities, understand word origins, and discover that language can deepen our support of one another. The intention of this series is to learn more about language, its history, and the impact certain words can have (as well as more suitable alternatives). It's showing that we're all learning together.

***"What's exciting about this series is that it's helping us break apart the misconception that diversity equals race."***

"Our language of inclusion series has included 'grandfathered,' 'spirit-animal,' 'crazy,' 'you guys,' 'I don't see color,' and more — all for the purpose of broadening our conversations which aid in increasing our culture competence," says Lou Longo, chair of our DEI Council. "It's how we continue to uphold our Principle of Diversity, Equity, and Inclusion."

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# Progress

## We're making progress.

Here are a few of the results from our most recent Great Place to Work survey, which led to our inclusion on Fortune magazine's "100 Best Companies to Work For" list for the 25th consecutive year!

- 98%** | *When you join the company, you are made to feel welcome.*
- 97%** | *People care about each other here.*
- 97%** | *I'm proud to tell others I work here.*
- 96%** | *You can count on people to cooperate*
- 95%** | *I would strongly endorse my company to friends and family as a great place to work*
- 95%** | *Management invests in people's wellbeing*



**31 languages** spoken by our staff

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# PROGRESS



## An update on **WOMEN** in Leadership

from **Karla Whittenburg**, *Partner, WIL leader*

For more than 10 years, our Women in Leadership (WIL) initiative has been a DEI priority at Plante Moran. Our WIL leadership, headed by Partner [Karla Whittenburg](#), collaborates with firm management to create programs, opportunities, workshops, and more that lead to greater advancement opportunities for women at the firm.

Most recently, WIL hosted its annual conference with the theme “Claim the Stage.” As part of the event, attendees heard from Speaker Eleni Kelakos on taking the reins of one’s career, working with their teams to craft a customized career path, and “claiming the stage.” The session, borne out of Eleni’s passionate belief that we need more women’s voices on the speaking platform, in the boardroom, and in the political arena, challenges women to step up and speak up within the inner circles where decisions are made.

In addition, WIL continues to offer a handful of “WIL Talks” each year. The content is designed around topics that participants have requested, such as mapping out a career path, building practice development skills, and more.

Finally, in late 2023, Karla, as WIL leader, and Ginger Powell, WIL regional and office liaison, began touring our regions to meet with the WIL office champions and office managing partners/impact leaders to discuss successes and areas to improve the effectiveness of WIL. Their goal is to hit all of our U.S. regions by early 2024.

[Learn more about Karla and understand her goals for the future of WIL.](#)

***In 2023, we promoted: 2 female directors, 7 female partners, and 18 female principals.***

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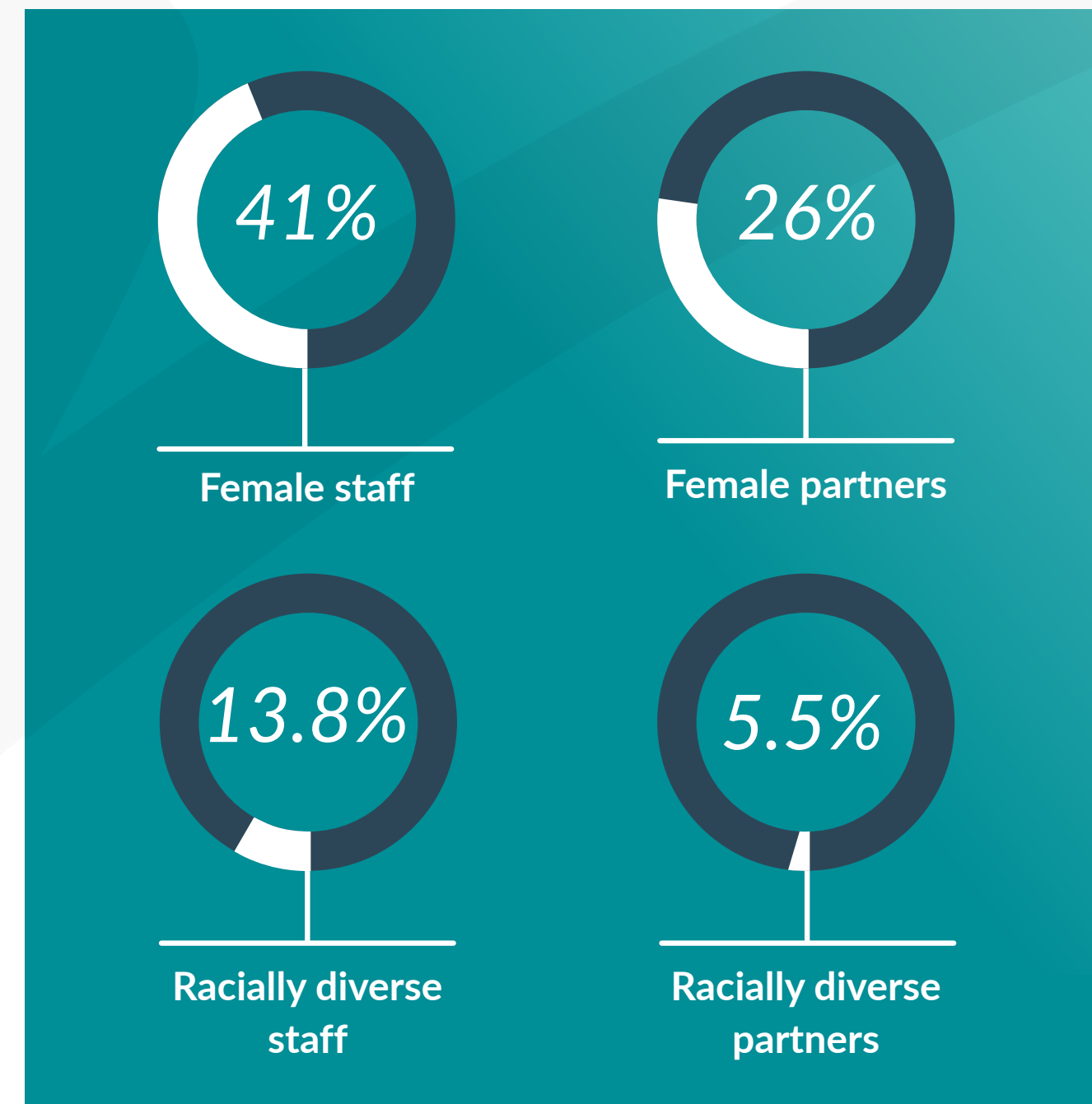
# PROGRESS

From FY22 to FY23, we increased the representation numbers of our racially diverse staff by nearly 20%.

## Firm diversity

All staff racial diversity as of July 31, 2023	Admin	Practice Includes para prof	Firm total	% of total staff population
White	673	2271	2,944	85.41%
Asian	24	143	167	4.84%
Hispanic/Latino	32	96	128	3.71%
Black or African American	57	54	111	3.22%
Other	20	49	69	1.9%
I do not wish to answer	10	18	28	<1%
Grand total	816	2,631	3,447	100%

Staff data excludes interns, temporary, contract, and international staff



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## DEI governance

We can't elevate our DEI initiatives across the firm without the continual efforts of many passionate Plante Moraners. To create long-term impact, we rely on their involvement at all levels and roles in our organization. Since creating our DEI Council more than 20 years ago, we've broadened our reach and scope in numerous ways. From the number of SRGs to cementing DEI into our foundational principles, we've been able to make progress because our staff have never stopped caring and advocating for one another.

Of course, our DEI Council, champions, and team can't carry our firm's entire DEI strategy. The responsibility of ensuring an inclusive and equitable experience starts with firm leadership and, ultimately, encompasses nearly 400 partners across the firm as well as our more than 3,800 staff.

**1,300+**  
people involved  
in our SRG network.

**55+**  
people leading  
our DEI initiatives.

Here's a snapshot of the groups that help us execute on our DEI strategy.

**DEI CORE TEAM.**  
Staff members who are fully dedicated to DEI.

**DEI STEERING COMMITTEE.**  
Leadership team that sets and approves DEI initiatives and activities.

**DEI COUNCIL.**  
Established to guide the firm toward long-term success and growth in diversity practices.

**DEI CHAMPIONS.**  
Office or regional partners that lead DEI efforts in their respective areas.

**SRG LEADERSHIP.**  
Ensure that their SRGs' activities are meaningful, educational, and geared toward success — for both the SRG and the firm's overall DEI objectives.

**INTERNAL DEI COMMITTEES.**  
Dedicated to accelerating DEI goals at the office, team, or industry level.

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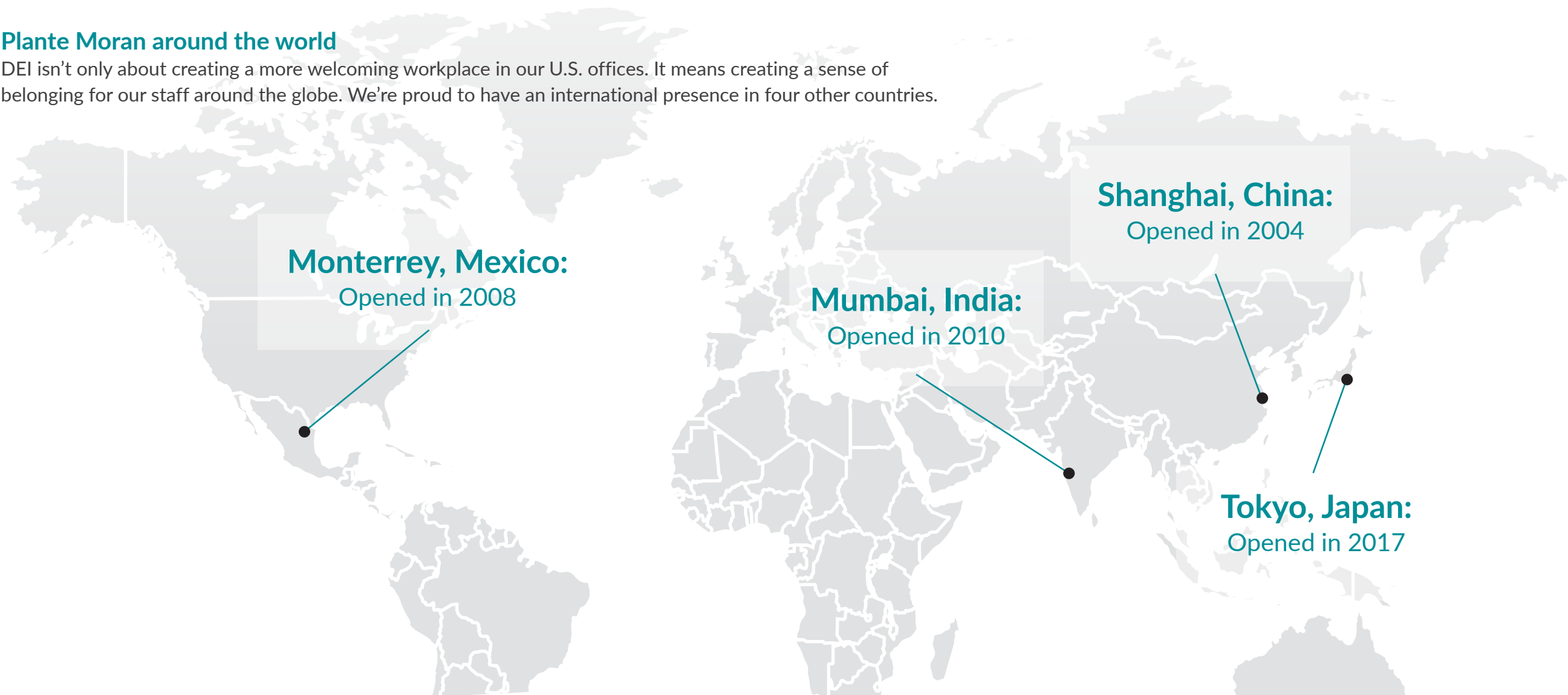


# PROGRESS

## International offices

### Plante Moran around the world

DEI isn't only about creating a more welcoming workplace in our U.S. offices. It means creating a sense of belonging for our staff around the globe. We're proud to have an international presence in four other countries.



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# Future

## What does diversity, equity, and inclusion mean at Plante Moran?

### DIVERSITY:

We value the unique identities and experiences of our staff.

### EQUITY:

Everyone has an equitable and fair opportunity to succeed.

### INCLUSION:

Each staff member can proudly say, "I know I belong here."

*We strive to create a culture where each person feels accepted and valued. We believe that each person's ultimate potential begins with first acknowledging their inherent dignity. When we can recognize — and celebrate — our many human differences, we're able to create a workplace where all staff feel a sense of belonging and an opportunity to succeed. This allows us to attract and retain the best talent, serve clients through diverse thinking, and better represent and support the various communities in which we live and work.*



## 2024 DEI goals:

- Create deeper sense of belonging and inclusion through the firm
- Improve pipeline of racially diverse talent
- Increase retention rates for racially diverse staff
- Improve how DEI data is collected and benchmarked

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plante moran

Audit. Tax. Consulting.  
Wealth Management.

100 years





# Future



## Together, we continue to grow and learn

It's been a great year for the DEI initiatives we're building across the firm. We continue to diversify not only our workforce, but also the way we support our staff, show up in our communities, and support our clients.

We continue to work on enhancing our awareness of the changing needs around us, while taking action to be a more inclusive firm where people know they belong. With activities like our first-ever DEI survey, focus groups, and senior-level DEI training, we're making investments whose impacts will last for years to come.

In the next year — our 100th year as a firm! — we plan to build on this momentum. We know that diversity, equity, and inclusion is for every single person — regardless of their gender, race, sexual orientation, or other identity, but we also know that we need to continue to obtain the buy-in and understanding that we all have a significant role to play.

Hawzien Gebremedhin, DEI leader (she/her)

*“Together, we...” is our 2024 theme. With this concept, we will attempt to reflect that in a way that brings us all together and empowers us as individuals and as a collective. Because at Plante Moran, we know that together, we are stronger, more inclusive, more supportive, and more effective — and in 2024, we'll show you just how.*

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