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# 2022 Diversity, Equity, & Inclusion Annual Report

*With understanding and awareness,  
we can drive action and increase empathy.*

Welcome to our 2022 Diversity, Equity, and Inclusion (DEI) Annual Report. Over the last year, we were intentional about spreading awareness and deepening our understanding of DEI across the firm. We've seen many opportunities to learn new ideas and embrace change — starting with our DEI leadership.

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Last year, we welcomed our new DEI leader **Hawzien Gebremedhin** to the firm. Hawzien, who immigrated to the United States from the Tigray region of Ethiopia when she was a child, is passionate about DEI. She aims to help develop and guide our firm's various DEI strategies around our talent, our clients, how we interact with our communities, and how we're integrating DEI across the firm. In addition, partner and long-time ally **Lou Longo** has succeeded **Rich Antonini** as chair of our DEI Council. Between Hawzien's energy and perspective and Lou's long tenure at the firm and passion for DEI, we're excited to build on what we've learned and move forward on our journey of continuous learning.

And we carried out a very intentional journey in 2021 through our Year of Understanding. Developed in response to the social unrest of 2020, this initiative has focused on elevating our cultural competence to create meaningful internal changes. Essentially, the journey has been making our firm more inclusive and equitable and "walking the talk" in our commitment to social justice. We've fostered this learning through a variety of speakers, events, a DEI library, and our monthly Path to Understanding challenge with critical resources that staff can engage with. We're excited to take this initiative to the next level with 2022's Year of Action.

Our firm managing partner Jim Proppe introduced the Year of Action at an internal event that wrapped up our Year of Understanding. There we reflected on what we've learned as a firm and the experiences we've had. As we transition into 2022, we're hoping that staff will take what they learned through their own journeys and have the courage to act on it. Here's what Jim had to say about it:

**"The Year of Action will include ways that each of us can take actionable steps to not only increase our cultural competency but to hold ourselves accountable for our growth. We will be digging deeper into the ways we recruit, retain, and develop our staff, as well as the ways we show up and support our clients and community."**

We'll continue to strive to be an inclusive workplace. Our hope is that when we create a space for all staff to be themselves and to belong that they're able to find personal satisfaction, achieve professional fulfillment, and bring their whole self to work.

Sincerely,

**Beth Bialy**, Group Managing Partner, DEI Sponsor

**Hawzien Gebremedhin**, DEI Leader

**Lou Longo**, DEI Council Chair



BETH  
BIALY

Group Managing Partner,  
DEI Sponsor



HAWZIEN  
GEBREMEDHIN

DEI Leader



LOU  
LONGO

DEI Council Chair



## Plante Moran Cares supports DEI nonprofits

**Plante Moran Cares** is about more than raising money. It provides our staff with the opportunity to make a difference in the communities where we live and work.

While it's a firmwide initiative, the focus is localized and grass-roots, empowering office-based efforts that demonstrate our "We Care" attitude.

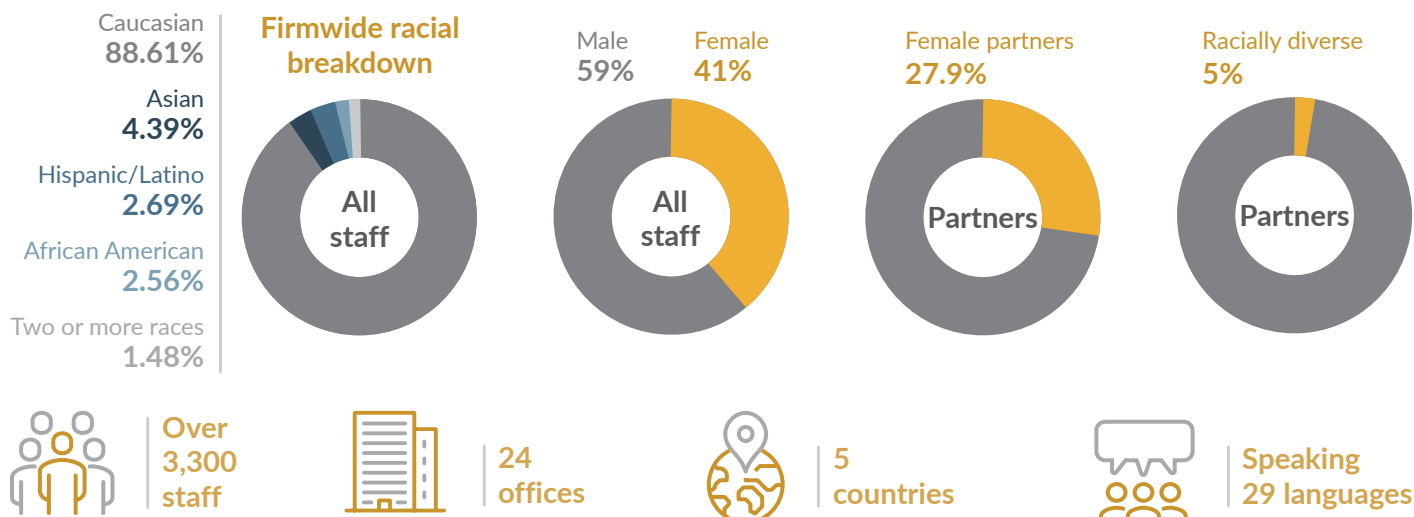
For FY22, each of our offices is working in conjunction with our DEI Council to help understand cultural differences and become allies and advocates. The charities selected by each of our offices align with various primary and secondary diversity attributes. A few of the organizations we're supporting this year are **OneGoal**, **Youth Opportunities Unlimited**, **Equality Toledo**, and **Leader Dogs for the Blind**.

## Introducing an "Exceptional" partnership

Plante Moran is **partnering with the Exceptional Academy (EA)**, a local, one-year program that offers Cisco certification and cybersecurity and network training for adults with autism and other neurodiverse attributes. In addition to offering internships, career opportunities, and support to students, a key element of Plante Moran's partnership with the EA is in the development and creation of Exceptional Academy's Tech Advisory Board. One of their main goals is to impress upon other companies the benefits of hiring individuals with disabilities and ensure local students obtain jobs in the metro Detroit area.

To learn more about this program and how it creates meaningful change for its graduates, check out our staff **profile of John Ferella**. After he graduated from EA, he had the skills to elevate his career from fast food to a full-time cybersecurity position with Plante Moran. John's accomplishments are proof of the success of the EA. We're hopeful more community organizations will support these students.

## By the numbers





## The creative potential of DEI partnerships

As part of our DEI efforts across the firm, we've been intentional in finding areas where we can do better. Our Chief Marketing Officer Marten Vanpelt saw an opportunity when it came to our collaborations with external creative and production vendors.

Traditionally, when our firm has partnered with an agency on advertising projects, the work might have been completed outside of our footprint and without any requirements for diversity partnerships. That didn't sit right with the team, so we spearheaded an effort to work with diverse advertising and marketing vendors as often as possible.

"When we don't consider diversity in our partnerships, we're missing out on a variety of important experiences and voices," said Marten. "There's so much talent in these regions — it's important we're intentional in securing different perspectives, developing a more well-rounded approach to what clients want to see, and elevating the work of creatives who might have gone underrepresented."

Plante Moran Wealth Management's recent advertising campaign, launched in early 2022, is the latest example of new partnerships with more diverse vendors. The campaign featured original photography shot by Detroit-based photographer **Marvin Shaouni** as well as a **commercial** directed by Detroit-based **Zachary Cunningham** and produced by **We The People**, a minority-owned production company.

## Awards

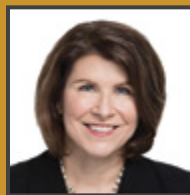
### *Beth Bialy named a Notable Executive in Diversity, Equity, and Inclusion by Crain's Detroit Business*

To be successful in promoting a culture of diversity, equity, and inclusion, you need to be empathetic, admit what you don't know, and make a personal commitment to both educate yourself and put in the hard work. That's Beth. She knows our industry can do better, and she's determined to move herself — and the firm — further on this continuum.

This continuous pursuit of improvement is one reason why Crain's Detroit Business recognized Beth — the management team sponsor of our DEI Council — as a notable DEI executive. The award recognizes professionals who have championed and implemented diversity, equity, and inclusion strategies and initiatives within their organizations.

### *Kris Ray honored with Leadership Oakland's 2021 Professional Leader Award*

The Professional Leader Award recognizes program alumni who achieve success and positive change through bold and smart risk-taking. Kris earned this honor for her work as Plante Moran's not-for-profit technical leader and guiding our nonprofit clients through an extremely difficult year as well as her leadership in our PM Pride Staff Resource Group.



BETH  
BIALY

Group Managing Partner



KRIS  
RAY

Partner



## Staff resource groups

### *Creating a culture where all staff feel a sense of belonging*

Our DEI leader Hawzien Gebremedhin wants people to know we're committed to being a firm where all people can thrive and celebrate their differences. That's why staff resource groups (SRG) are an essential platform to help build a deeper sense of belonging and inclusion throughout our firm.

"Though autonomous, all of our SRGs have a similar vision: to help our diverse staff feel seen, heard, and supported," Hawzien said. "We currently have four SRGs: Pride, African American, Veterans, and Satellite with plans to add more in 2022. We understand that our SRGs are crucial to help our diverse staff members feel a deeper sense of community while building a more inclusive workplace for all."

### **African American (AA) SRG**

Staying true to last year's theme of empowerment, the AA SRG believes it's important to continue focusing on building the group professionally, physically, and mentally. As part of that growth, they're connecting with SRGs at other accounting firms to discuss networking, joint events, and approaches to significant celebrations, such as Juneteenth.



The group continues to hold monthly meetings where they focus on professional growth and career development without losing sight of the personal ties that were strengthened in 2020. They see themselves as a family that's there for each other during the good and the enduring times. Members of the group have been active in designing and participating in events for the firm's Year of Understanding, such as the "Belonging at Plante Moran" event, which explored our firm's culture and the experiences that impact our sense of belonging.

Passionate about supporting community organizations, they donated care packages and gave monetary donations to **Teen HYPE** and the **Detroit Boxing Club**. They also helped with the Jive Turkey fundraiser that provided Thanksgiving dinners for families of students in the Southeast Michigan area.



**Nicole Cole:** *This group has been vital to me personally and professionally. I'm thankful for the support of the AA SRG family from the management team and for all of our SRGs. It's empowering to see so many people display true allyship for one another.*

### **PM Pride SRG**

PM Pride has generated a lot of excitement over the last year, from increased membership (they're gaining new members each month!) to its sponsorship of the Matthew Shepherd's "Make A Difference" gala. However, one initiative really stood out — their T-shirt charity drive, which was a firm first. PM Pride raised funds for the Trevor Project through donations, matching gifts, and sales of its "We all Belong" T-shirts. Members also created a video of the same name in honor of Pride Month." We encourage you to watch the video [here](#). (Grab a tissue!)





**Robyn Renner:** *As a gay person with a career spanning over 40 years in professional services, I'm generally guarded about being fully authentic in the workplace but that changed for me a few years ago. I see the sincerity of the firm's commitment to these spaces. I can't overstate how meaningful this group is for members on a personal and a professional level. Seeing Kris Ray elevated to partner is affirming. It's new for me to see accomplishments of openly LGBTQ professionals fully celebrated.*

### Satellite SRG

While the pandemic has forced many of us to work remotely over the past year and a half, there's a portion of our workforce that has always been — and always will be — working from home. We call them our “satellite” staff. For these SRG members, the goal is simple: to ensure all members feel connected — and are included.

The Satellite SRG looks forward to continuing to find opportunities to advocate and promote visibility for its members. A recent example of this was the firm's **Celebrating Our People** article in October. In this piece, a few Satellite team members were featured to highlight their personal journeys, the opportunities offered by the firm, and their tireless commitment to client service from their quiet little corners of home (even if “home” is on wheels).



**Christa Leson:** *I feel so fortunate I was able to become a fully remote worker when my family moved from Michigan to Texas. I don't take it lightly that they agreed to my request that enabled me to help support my husband. It makes me — and my family — feel incredibly valued.*

### Veterans SRG

With all branches of the military having a high regard for service, it's no surprise this group is especially excited for in-person events. Not only are they eager to meet with one another for meetings, they're looking forward to going into their communities to support the charitable groups they've identified. The group is also excited about working in conjunction with the other SRGs. As the Veterans SRG champion has said, “With our backgrounds, we have the ability to synergistically work well with others, and we're looking for opportunities to show that in the coming year.”

Most importantly, though, they want to support their members and help make the firm more inclusive for current and former service members as well as families of those in the military. They're exploring ways to educate the firm on the veterans' experience and support family members who have loved ones on active duty. They know firsthand there's no better feeling than knowing other people are looking out for you and your family.



**Melanie Ceo:** *I've learned a lot about military life from my husband and my son. Being an ally with the Veterans SRG helped me realize there were some things we as a firm needed to do to better serve our service members. I'm hoping by being part of this group, we can continue to look at our practices to ensure we're supporting our active duty and veteran staff.*

## Continuing to build on our success

An update from WIL Leader **Judy Wright**

Since I stepped into the WIL leader role three and a half years ago, I've enjoyed watching as we've progressed on a number of our goals:



**JUDY  
WRIGHT**  
Partner, WIL Leader



Today, women make up 27.9% of all partners, up from just under 18% when WIL was formed in 2012.



Our female mentoring program has seen a 300% participation increase over that same time period.



The percentage of female practice unit managers has more than doubled to 25.7%.

And I'm confident that sense of progress and empowerment will continue as **Partner Karla Whittenburg** steps into the role of WIL leader this summer. Karla has been a leading voice for women in the Rocky Mountain Region, and I know she'll bring her legacy of strong leadership and mentorship to the rest of the firm.

Speaking of leadership, even in a virtual environment, we've seen that WIL events are deeply resonating with staff. Our annual WIL Conference, focused on "Leading through Uncertainty," was the firm's most well-attended WIL event. We also hosted an event on leadership styles and unconscious bias in late fall. Because we knew this would be highly beneficial for all attendees, we offered this to leaders of all genders. The feedback was incredibly positive, which proved to us that people are interested in opportunities to deepen their awareness of others.

It's affirming that staff are eager for this content as it's in line with WIL's future outlook. We know the more diverse an organization and its client service delivery teams are, the better performing the team is. DEI initiatives matter for client service as well as professional growth. We know we need to be more focused than ever on retention. As we move forward, we'll continue to seek out opportunities to collaborate with the DEI Council and our SRGs to find more ways to connect, build relationships, and re-recruit and retain staff.

Finally, I want to recognize our dedicated WIL office champions. They've successfully arranged a variety of events over the last 12 months to keep us learning, connected, and on track. While the pandemic initially put a pause on gatherings, they've been creative and thoughtful about modifying our approach to events, redesigning content, and including as many staff as possible. WIL remains successful because of their leadership and their efforts.





Congratulations to our new female partners and principals! In the spirit of learning more about these leaders, we asked them to sum up their favorite thing about PM in just a few words.

#### New partners:



**Jaime Eckels**, PMFA, Auburn Hills:  
Work-life balance.



**Dori Eggett**, Tax, Denver Tech Center  
We all belong.



**Valerie Grunduski**, Tax, Detroit:  
Relationships. Options. Heart.



**Ashley Paschke**, Tax, Denver Tech Center:  
Together as friends.



**Ginger Powell**, Tax solutions, Schaumburg:  
Inclusive. Growth. Opportunities.



**Kris Ray**, Assurance, Southfield:  
Feels like home.



**Amber Terakedis**, PMFA, East Lansing:  
Best-in-class.



**Jeanette Tolar**, SALT, Downtown Denver:  
My team.



**Diana Verdun**, HR, Grand Rapids:  
We fly together.



**Colleen Wellman**, Assurance, Auburn Hills:  
Rewarding. Flexible. Supportive.



**Jenna Zhou**, Tax, Denver Tech Center:  
World-class culture.

#### New principals:



**Sarah Blascyk**, Tax, Flint:  
Opportunity to grow.



**Dana Hullinger**, Tax, Southfield:  
Family. Flexibility. Future.



**Laura Parish**, Tax, Chicago:  
People. Challenges. Flexibility.



**Rachelle Roberts**, Tax, Chicago:  
People. Culture. Flexibility.



**Lisa Roelofs**, Tax, Auburn Hills:  
Collaboration. Opportunity. Support.



**Teri Salas**, Tax, East Lansing:  
The Golden Rule.



**Marie Stiegel**, Assurance, Grand Rapids:  
Opportunity. Flexibility. Team.



**Christy VanDeWater**, Management Consulting,  
Columbus: Caring. People. Opportunity.



**Jessica Wiltjer**, Tax, Grand Rapids:  
People. Flexibility. Challenge.

## Because the whole person comes to work

### *An update from our partner sponsors Toni Diprizio and Drew Mattox*

An essential component of the WorkFlex Committee is the idea that we all need to be flexible. What works one week for work-life balance might look different the following week or the following year. The key is to be adaptable and open to changing circumstances.

The same is true of the WorkFlex Committee itself, as Drew Mattox has replaced Brian Camiller who helped steer the group for four years. Drew is excited to take on this role and help lead the change for how those working in public accounting view the concept of balance.

“It’s our responsibility as partners to lead by example when it comes to embracing flexibility. I want everyone to realize that work schedules can look different,” says Drew. “We have to work hard, yes, but also understand that we don’t have to work the same way our team partner or colleagues do. At the end of the day, flexibility isn’t just about work-life balance, it’s about retention. We have awesome people who work here, and we need to help perpetuate a culture where people know they can flex their schedules when needed. It’s not about just developing a career; it’s about feeling successful both personally and professionally.”

This messaging has remained true ever since our early days — that’s because balance has been tied into the fabric of the firm. Because how we approach balance is more important than ever. Thanks to our “workplace for your day” hybrid model, people are making personal decisions for how they exercise work-life balance. We hope, whether they come into the office or work from home, that they have a positive mindset. In the words of Partner Sponsor Toni Diprizio, “We want staff to think, ‘Wow. It’s great I get to work this way.’”

And, to encourage that mindset, the WorkFlex Committee has adopted its latest theme: the whole person comes to work. We recognize that no two of us are the same and, therefore, neither are our needs or how we balance our days. WorkFlex doesn’t focus on one diverse aspect of our population, but instead focuses on the differences in all of us. With this new theme, we want to emphasize that we’re committed to physical and emotional wellness for all while realizing that flexibility and balance look different for each of us.

While Brian is transitioning out of his leadership duties, he wants staff to know that the firm hasn’t decreased its commitment to supporting staff with all aspects of balance.

“If anything, it’s as fundamental to the firm as anything else is. We continue to look for a variety of ways, as many as it takes, to be a firm that fits for everyone no matter their circumstance.”



TONI  
DIPRIZIO

*Workflex Partner Sponsor*



DREW  
MATTOX

*WorkFlex Partner Sponsor*



# Final thoughts

## It starts with dignity.

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 many communities in which we live and work.

### 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 aspire to be:



A firm where all people can thrive regardless of their differences.



A firm that is representative of the diverse communities we serve and work in.



A firm where leaders set the tone and drive DEI progress.



A firm where all people see themselves as future leaders.

## Join us.

How is your organization progressing on its DEI journey? Do you have any inspirational stories to share? We'd love to hear them. Just drop us a line at [DEI@plantemoran.com](mailto:DEI@plantemoran.com).

Want more? Follow our DEI journey on social media.



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