



2021 ANNUAL PROGRAM REPORT

bergankdv

a letter from the council

The council is pleased to present our first annual #Perspective Program Report showcasing the activities and opportunities BerganKDV has created to further our firm goals around diversity, equity, and inclusion [DEI].

This report shares our core focus as a council, some DEI highlights from fiscal year 2021, our fiscal year 2022 goals and all the things we're aiming to achieve. We are excited to share the progress we've made, but also appreciate that DEI is a journey, not a destination. We, as a collective BerganKDV community, must continue this DEI work of awareness and learning, sponsorship, mentorship, allyship, and open-mindedness when hearing and sharing perspectives. This work will make us better team members, stronger leaders, top performers, better service providers, and a better firm overall.

We'd like to thank our Leadership Team and all the BerganKDV team members who support of our efforts.

CORI POWER
DEI COUNCIL CHAIR

#PERSPECTIVE

WHY FIT IN WHEN YOU WERE BORN TO STAND OUT?

core program focus

overview

Our Perspective Program's focus is to create and foster a culture of Diversity, Equity and Inclusion that enables us to attract and retain great Talent, hold open dialog to improve teamwork and ultimately result in a WOW experience for our clients and team members.

DIVERSITY // EQUITY // INCLUSION

council members

DAWN CLARK

MATT COSGRIFF

DREA DALZELL

CRYSTAL FORD

HEATHER GUNDERSON

SHARON HANSEN

IAN O'BRIEN

MARY MILAM

ROBIN NELSON

CORI POWER

MARIE PRIMUS

RENEE WHARTON



highlights

DEI

WE HAVE METRICS! We recognize that it's nearly impossible to measure ROI without some baseline data. Therefore, we've created a DEI scorecard to begin tracking some statistics including our recruiting candidate pool, current team member information, and attitudes toward DEI (which was included in both the 2020 and 2021 engagement survey). You can find some of this data on the last page of this report.

We provided SO MANY learning opportunities! This year the learning and development calendar held quarterly trainings around DEI related topics.

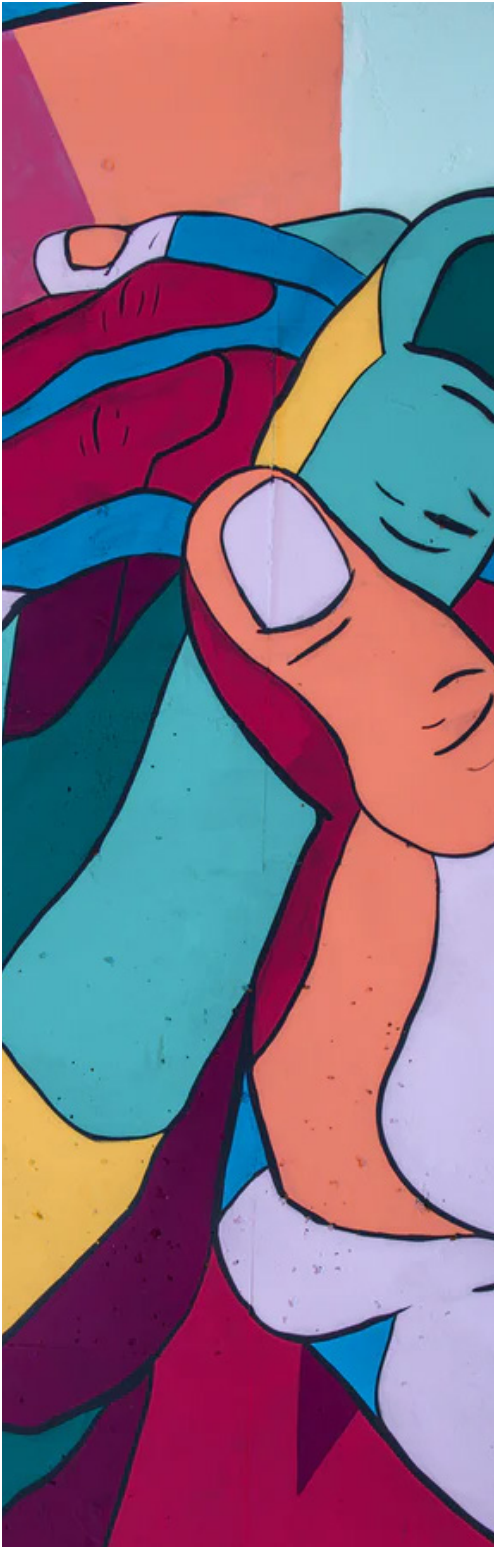
- Authentic Leadership
- Diversity Defined
- Respect & Inclusion
- Walk a Mile in Her Shoes

We held five #Perspective Book Club conversations around these topics:

- White Fragility by Robin DiAngelo
- That's What She Said by Joanne Lipman
- Systemic Racism Explained
- Daring Greatly by Brene Brown
- 13th Documentary

We also provided implicit bias training that all BerganKDV team members were required to attend. Rarely do we feel that mandatory training is the way to go when it comes to DEI, but as the training states, "if you have a brain, you have bias." With this in mind, we decided that all team members should really understand what implicit bias is and how to mitigate it.

Finally, the council was excited for the addition of a Parent Connection Circle to our Virtual Communities. Taking elements from our Lean In Circles and feedback from those who are juggling parenting and work, this community seeks to provide support, resources, and connection for working parents here at BerganKDV.



goal one

INCREASE OUR NON-WHITE APPLICANT POOL FROM 19% TO 30%

To be very clear, we are not intending to fill any specific hiring “quotas” with this goal. What this goal is intended to do is to expand our pipeline to include a more diverse range of candidates. Greater diversity in our hiring pools could result in more all-inclusive talent joining the ranks of this amazing firm. Diverse talent means diverse perspectives which leads to better problem solving and increased performance overall.

The council is partnering with the recruiting team to develop a plan for ways that we can achieve this goal. Some specifics include:

- Including \$2000 in the DEI budget to provide two \$1000 #Perspective scholarships in FY22 with the purpose of encouraging more diverse students to join the professional services field and to continue partnering with the colleges and communities in our communities where we frequently recruit.
- Partnering with Junior Achievement in our communities to increase knowledge of what a professional service firm does and create long term interest in our firm.
- Continuous improvement on our DEI Scorecard including providing industry, national, and local benchmarks for gathered statistics, as well as expanding our scorecard to include by market and solution data tracking.

goal two

CREATE A SPONSORSHIP PROGRAM WHERE 50% OF SHAREHOLDERS MUST SPONSOR A HIGH POTENTIAL UNDERREPRESENTED TEAM MEMBER TO DEVELOP FUTURE BKDV LEADERS

Sponsorship and mentorship are very different. Mentorship is a two-way relationship between a mentor and a protégé where the mentor provides advice and guidance. Sponsorship is a three-way relationship between a sponsor, a protégé, and an audience where the sponsor provides advocacy and increases the protégé’s visibility and connections with a key audience. This goal is intended to increase the diversity of our shareholder group by encouraging and supporting our shareholders to take an active role in this effort.

goal three

REVIEW DEI ENGAGEMENT SURVEY RESULTS AND MEET WITH S4 LEADERS TO SHARE IDEAS ON IMPROVEMENT

The council included several DEI related questions in our annual engagement survey, and we will be reviewing those results with firm leaders so we can partner with them to increase DEI engagement across the firm. We will also be implementing a quarterly DEI pulse survey.

goals

19 PERCENT
30 PERCENT

JOIN US!

Future DEI Events:
Monthly Training
Book Clubs

New Perspectives:
Join our Council
Visit as a Guest

Learn More:
DEI@
bergankdv.com

SHE
HER
HERS
HE
HIM
HIS
THEY
THEM

representation

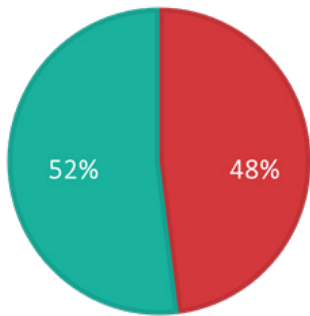
stats

Below is a snapshot of current gender and racial representation across our firm for the year of 2021.

GENDER BREAKDOWN

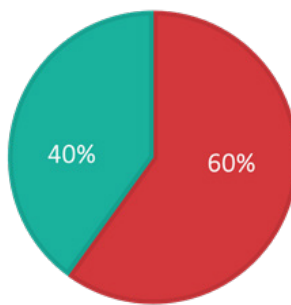
FIRM-WIDE

MALE 48% | FEMALE 52%



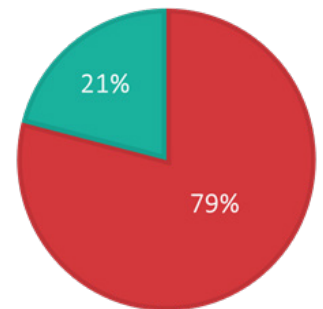
MANAGER

MALE 60% | FEMALE 40%



SHAREHOLDER

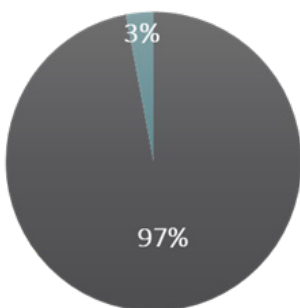
MALE 79% | FEMALE 21%



RACIAL BREAKDOWN

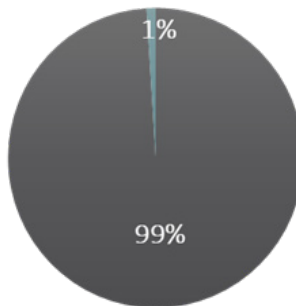
FIRM-WIDE

WHITE 97% | NON-WHITE 3%



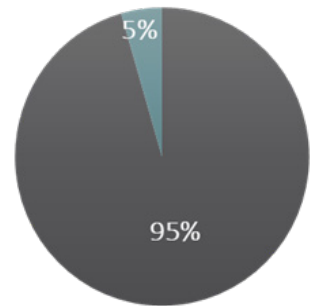
MANAGER

WHITE 99% | NON-WHITE 1%



SHAREHOLDER

WHITE 95% | NON-WHITE 5%





ALL BELONG HERE.

together, let's build an inclusive future.

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