



# Diversity, Equity, and Inclusion (DEI)

2022 Transparency Report



**Thank you for taking the time to learn about CLA's work in support of diversity, equity, and inclusion (DEI). In 2021, we issued our [inaugural transparency report](#) and now we continue to [share our progress](#).**

This year, we sought outside input on our work to weave DEI into our DNA, and I'm proud the assessment found DEI is a connection point for our CLA family. We affirmed bringing your whole self to work helps us thrive, and we provide forums for our people to be seen, heard, and valued. We're not afraid to tackle the tough issues and we must continue to dig into our diverse world.

I encourage you to spend time with the many highlights in this report, and want to celebrate three in particular:

1. CLA's expanded relationship with the National Association of Black Accountants (NABA), with 40+ CLA family members attending, speaking on panels, and reaching out in the community during the annual convention, along with a \$1 million grant to fund the Pathway to College program.
2. CLA's first belonging and inclusion summit, which brought together 250+ family members to celebrate our progress and announce an expanded full-time DEI team going forward.
3. CLA Foundation grants totaling \$1.9 million to connect diverse networks across the country.

We move to act and operate more inclusively every day. And when we fall, which we do, we pick each other up.

NABA's CEO Guylaine Saint Juste says it best, "We are intentionally pathing and paving a more just world ... together."

Yours in partnership,

Jen Leary  
CEO, CLA

# We build a culture of belonging

It's critical that DEI is woven into our daily practice, so we embedded inclusion as one of CLA's five foundational values. Living each of the five values is the responsibility of every CLA family member.



## Curious

We care, we listen,  
we get to know you



## Collaborative

We help you seamlessly,  
bringing innovative  
teams to the table



## Transparent

We communicate  
clearly and authentically



## Inclusive

We embrace all voices  
and create opportunities  
for you in an energetic  
and inspiring environment



## Reliable

We respond in hours, not  
days; we follow through,  
protect our client data, and  
produce quality results




CLAAconnect.com


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# DEI progress


We have been on an active DEI journey since 2014. Since then we have listened, learned, and continued to grow. 2022 brought significant progress and we are proud of the work done to integrate DEI into the framework of our business.



Hosting our first belonging and inclusion summit



Establishing our ninth virtual belonging community (VBC)



Welcoming thousands of CLA family members to monthly “Be Well and Belong” sessions



Investing in an outside assessment of our DEI activity



Adding executive sponsors for DEI ambassadors and VBCs



Funding a \$1 million strategic grant for NABA





# Our desired impact – and how we're getting there

CLA is working to be representative of the communities we serve now, and those we will serve in the future, by developing an inclusive culture built on belonging and equitable opportunity.

To achieve this impact, we will:

Hear the voices  
of our diverse  
family members

Actively listen,  
learn, and reflect

Create a safe  
place for all at  
CLA

Then implement DEI strategies throughout CLA in five areas



A photograph of four people (three women and one man) sitting on high stools on a stage. From left to right: a woman with blonde hair in a black top, a man with grey hair in a grey zip-up, a woman with long dark hair in a bright pink blazer, and a woman with long brown hair in a green cardigan. Behind them are the Mexican and Honduran flags. The stage floor is reflective. A large teal diagonal overlay covers the left side of the image, containing the text.

# LEADERSHIP

Weaving DEI into our succession philosophy

A colorful geometric pattern in the bottom right corner, consisting of triangles in shades of teal, orange, red, and yellow.



## LEADERSHIP



Our succession mindset underscores our desire to hire, engage, and advance underrepresented voices in our field. In 2020, 1% of our firm-wide leaders were people of color. In 2022, that increased to 8%.

We continue to see an upward trend in these areas not only among leadership, but throughout the firm, as illustrated here and on the following page.

### Breakdown of BIPOC Family Members at CLA

ETHNICITY	2020	2021	2022	% GROWTH 2020 TO 2022
American Indian or Alaska Native	13	16	16	23%
Asian	306	446	564	84%
Black or African American	199	263	320	61%
Hispanic or Latino	279	368	504	81%
Native Hawaiian or Other Pacific Islander	12	13	17	42%
Two or More Races	87	113	136	56%
I do not wish to answer	76	88	120	58%
<b>Grand Total</b>	<b>972</b>	<b>1307</b>	<b>1677</b>	<b>73%</b>

\*This chart follows the Equal Employment Opportunity Commission reporting categories. Included in people of color are: Asian, Hispanic or Latino, Black or African American, two or more races, American Indian or Alaska Native, Native Hawaiian or Pacific Islander.

"I don't know another accounting firm that has named 10 people of color as firm-wide leaders, including three female people of color leading offices. And I'm excited to see where CLA grows from there."

– GUYLAINE SAINT JUSTE  
PRESIDENT AND CEO, NABA, INC.



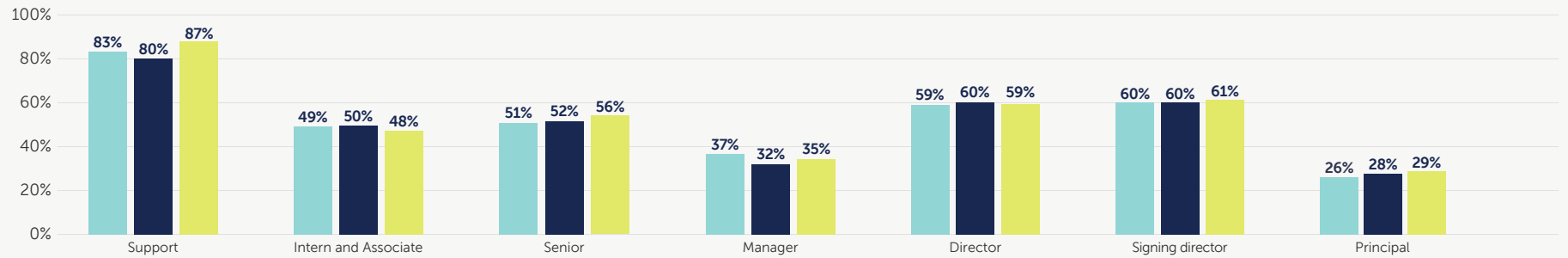
We celebrate that **55%** of our chief officers and **27%** of our matrix leaders are female. We also celebrate a rise in female signing directors and principals from 2020 – 2022 and note that **52.4%** of those advanced in 2022 were female.



## LEADERSHIP

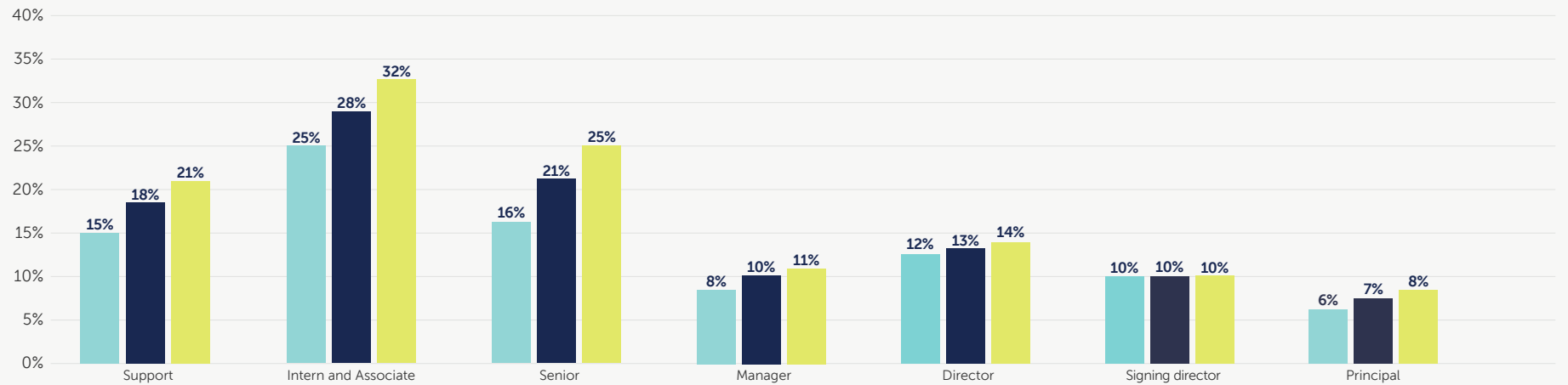
### Female Population by Job Level

Baseline (June '20) November '21 November '22



### BIPOC Population by Job Level

Baseline (June '20) November '21 November '22





## LEADERSHIP

### 2022 DEI leadership priorities

#### Peer advisors build inclusion

Inclusivity starts on day one. Our peer advisors bring support to new CLA family members.

#### Mentor and sponsor support

A new mentorship framework was designed to help VBC members thrive, and the women's VBC introduced sponsorship for females on their leadership journey.

#### Feedback inspires careers

The young executive team and young advisory councils help our professionals use feedback to create a clearer path forward in their inspired career.

#### Pouring into people

We again participated in the AICPA "We're About Success" program focused on retaining second-through fifth-year underrepresented professionals.





# OPERATIONS

Building DEI into how we operate

## OPERATIONS



## DEI assessment brings insight

In 2022, we engaged a third party to gain an outside perspective of our DEI activity.

We take pride in their key insights:

- Across all levels, there is an understanding that DEI is important to CLA
- DEI creates greater points of connection versus division

We have also taken action on the opportunities identified in our DEI assessment.

### Improve governance and structure

We are moving from a volunteer council to a full-time team of nine DEI professionals, including a dedicated recruiter.

### Provide greater support for DEI ambassadors

We are introducing executive sponsors for our ambassadors to elevate visibility and influence.

### Build urgency for consistent adaptation of DEI across locations

We are starting a DEI business activation role to uplift minority-owned businesses in the market.

### Improve reporting and measurement

We are creating a DEI scorecard to help us know and communicate movement.



“Our self-ID campaign generated three times the number of individuals electing to disclose a disability. This speaks volumes about our culture as a place where people feel comfortable, safe, and supported to self-disclose.”

– PAT BOWES  
MANAGING DIRECTOR OF PEOPLE SOLUTIONS

## OPERATIONS

# Expanded wellness offerings

### Disability accessibility

In 2022, we encouraged CLA family members to self-identify a disability so we can provide the tools and resources for our people to be at their best.

### Thrive well-being offerings

Thrive’s mobile app helps our people operate from a place of strength and resilience with cutting-edge science, storytelling, and inspirational tips — to improve our well-being and develop a more sustainable way of working.

### Listening session framework

Our 2022 listening sessions set aside time to provide a healthy container to share our voices and process world events compassionately, knowing we won’t always agree or have closure.

### Additional new offerings

Waived  
copay for  
mental health  
coverage

Enhanced  
fertility and  
family-building  
benefits

Ability for  
nursing  
mothers to  
ship milk home  
when traveling

Virtual physical  
therapy options

Increased  
adoption  
assistance  
from \$5,000 to  
\$15,000



## OPERATIONS

# Diversifying our supplier base

We continue, formally and informally, to grow a supplier base representative of the communities we serve. Our supplier diversity program started in 2020 and continues to progress:

SUPPLIER DIVERSITY SPEND***	#	SPEND
Minority business enterprise	34	\$ 1,236,736
Women business enterprise	40	\$ 1,607,351
Small business*	135	\$ 4,779,115
Veteran-owned business	14	\$ 236,607
Women-owned small business	18	\$ 727,751
Economically disadvantaged women-owned business	2	\$ 31,753
Disadvantaged business enterprise	14	\$ 1,032,340
Self-certified disadvantaged owned business	51	\$ 3,077,000
Small business association	4	\$ 250,943
Service-disabled Veteran	5	\$ 194,903
Disabled	5	\$ 194,903
ACDBE**	1	\$ 29,040
AbilityOne	1	\$ 1,317

\*Business at least 51% owned and controlled by socially and economically disadvantaged U.S. citizens.

\*\*Airport Concession Disadvantaged Business Enterprise

\*\*\* Supplier business type terminology established by the Minority Business Development Agency

**"9.3%** of CLA's total spend is with diverse suppliers, which is up from 4.5% in 2021."

– HEIDI HILLMAN  
CHIEF FINANCE AND OPERATIONS  
OFFICER



## OPERATIONS

# Deploying learning into the existing workflow

We touch the CLA family with DEI learning before joining the firm and throughout their career journey. Tailored experiences are offered at each step of career advancement, as shown in the graphic to the right. LinkedIn Learning, monthly “Be Well and Belong” sessions, and customized learning are offered throughout.



### Before joining

We convey to candidates we recruit: DEI is part of who we are

### Intern and associate

DEI is central to onboarding, and a key learning component for interns and new associates

### Senior

Brave spaces: We dig into psychological safety

### Manager and director

We hear the stories of each other

### Signing director and principal

Caring conversations, bias, and equity curriculum

### Leadership development

Rising leaders participate in an immersive DEI experience

### Firm-wide leader

Building an inclusive team is an expectation of our firm-wide leaders







# EMPLOYEE ENGAGEMENT

Providing meaningful ways to engage



## EMPLOYEE ENGAGEMENT



## We learn through each other

Providing meaningful ways for family members to engage is at the forefront of our DEI progress.

In 2022, we expanded our Wellness Wednesday “Be Well and Belong” series to one-hour sessions. Hosted by our VBCs, these sessions feature authentic voices and offer cultural competency education to our family members.



“Learning about Hispanic culture helped me see how culture can affect behaviors in the workplace and gives me a better understanding of those we work with.”

– WELLNESS WEDNESDAY PARTICIPANT



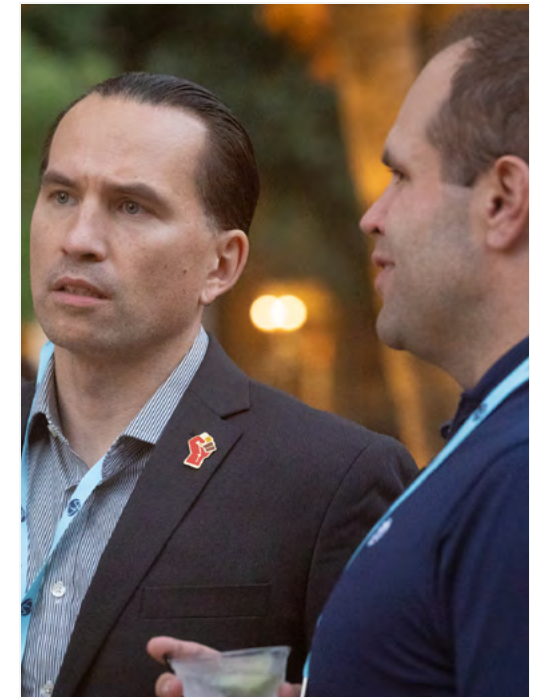




## EMPLOYEE ENGAGEMENT

# Belonging and inclusion summit

We closed 2022 by hosting 250+ VBC members and DEI ambassadors in San Antonio for a time of connection, celebration, education, and empowerment around our DEI efforts. The summit included dynamic teaching from Inclusion Action Collective, a collective of artists, thought leaders, professionals, and practitioners committed to the lifelong work of advancing equity.



## EMPLOYEE ENGAGEMENT

# Green Card Voices

The CLA family includes generations of immigrants who have come to America and joined CLA. Their experiences and insights are distinct and it is important for these experiences to be heard.

CLA collaborated with Green Card Voices to capture and share these stories at our national learning events for family members with fewer than five years of experience. Afterward, attendees used Green Card Voices' game, Story Stitch, to listen to stories and share their own.



“Our organization had the honor to record and share the stories of four amazing CLA family members born in Colombia, Vietnam, Senegal, and Morocco, respectively. Their authentic storytelling, infused both with vulnerability and courage, made others able to empathize and relate on multiple levels. The CLA family, consequently, seemed very open to holding space and being vulnerable through intimate storytelling to learn more about each other and uplift other diverse experiences.”

— TEA ROZMAN AND AALIYAH HANNAH, GREEN CARD VOICES CO-LEADERS

## EMPLOYEE ENGAGEMENT

# Virtual belonging communities grow

In 2022, we raised the visibility of our VBCs by adding executive sponsors, encouraging our people to identify their VBC participation in career coaching profiles to help with career coaching selection, and highlighting each VBC at our internal Connect, Inspire, Grow conference. This brought incredible participation, with more than 2,000 family members actively involved — a 40% growth from 2021.

That led us to build a framework to help establish new communities, and at the end of 2022 CLA introduced its ninth VBC: generationally Indigenous.

VBCs are open to all and encourage CLA family members who share a common affinity — such as gender, ethnicity, or shared background — to come together, share experiences, and foster growth.



Abilities at CLA

CelebrAsian

Generationally  
Indigenous  
(new in 2022)

Military  
connections

Parents and  
guardians

Pride at CLA

Sankofa

Una familia

Women at CLA







## EMPLOYEE ENGAGEMENT

### DEI action plans and ambassadors

CLA could not fulfill its DEI intentions without the dedication of hundreds of DEI ambassadors and local enthusiasts who walk alongside leadership and engage teams. More than 300 DEI ambassadors lead the way across our CLA locations, hosting educational sessions, DEI days, and cultural observance celebrations.

Across the firm, we create customized DEI action plans specific to the location or team to help carry out DEI on the ground.



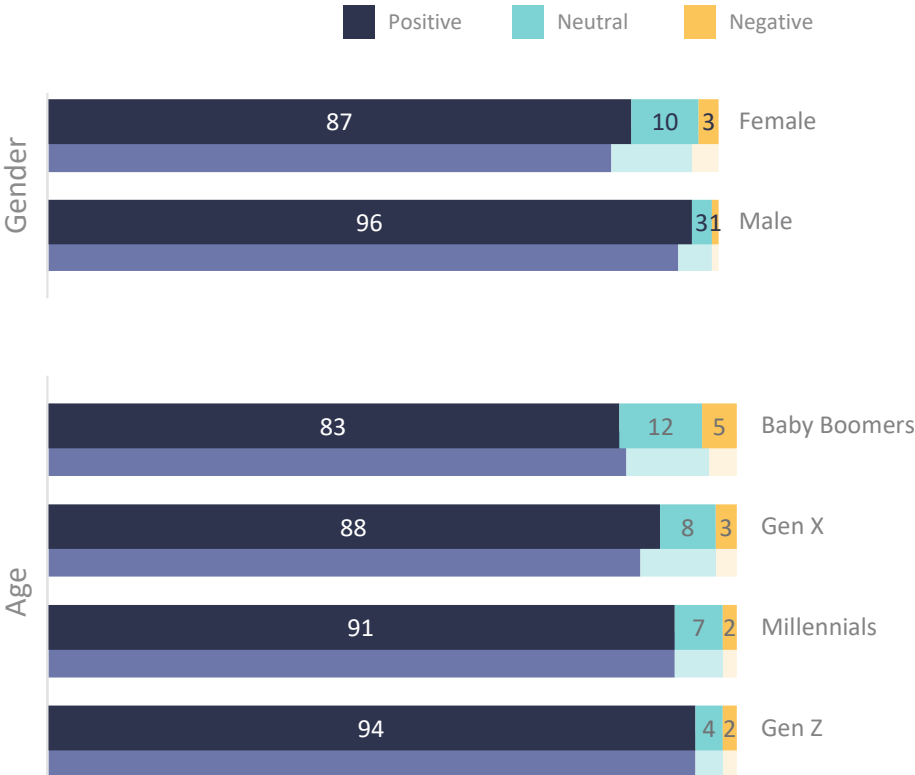
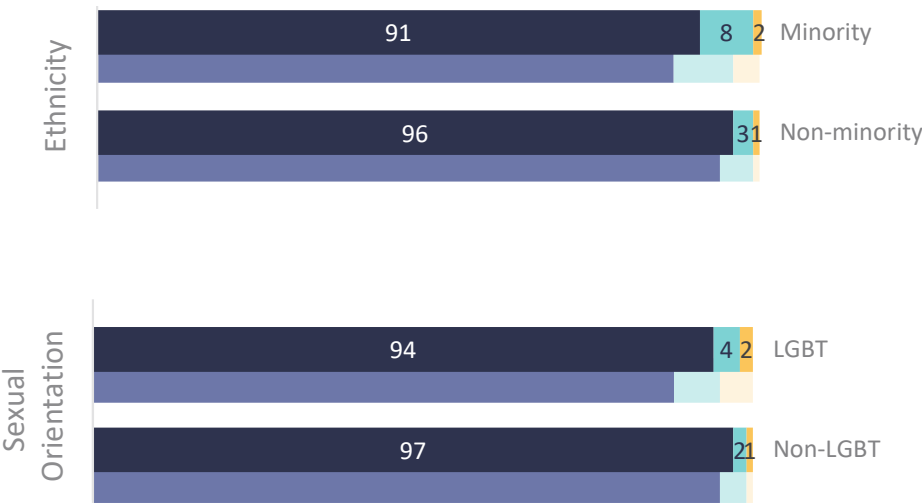


EMPLOYEE ENGAGEMENT

Survey results show strides in inclusion

To measure progress, CLA engages Great Place to Work®, the global authority on workplace culture, to survey our family members.

When asked whether people are treated fairly, regardless of their gender, age, ethnicity, and sexual orientation, we saw consistent responses among our CLA family members. We're proud of the growth we've seen from our efforts, as seen in the charts on the following pages.



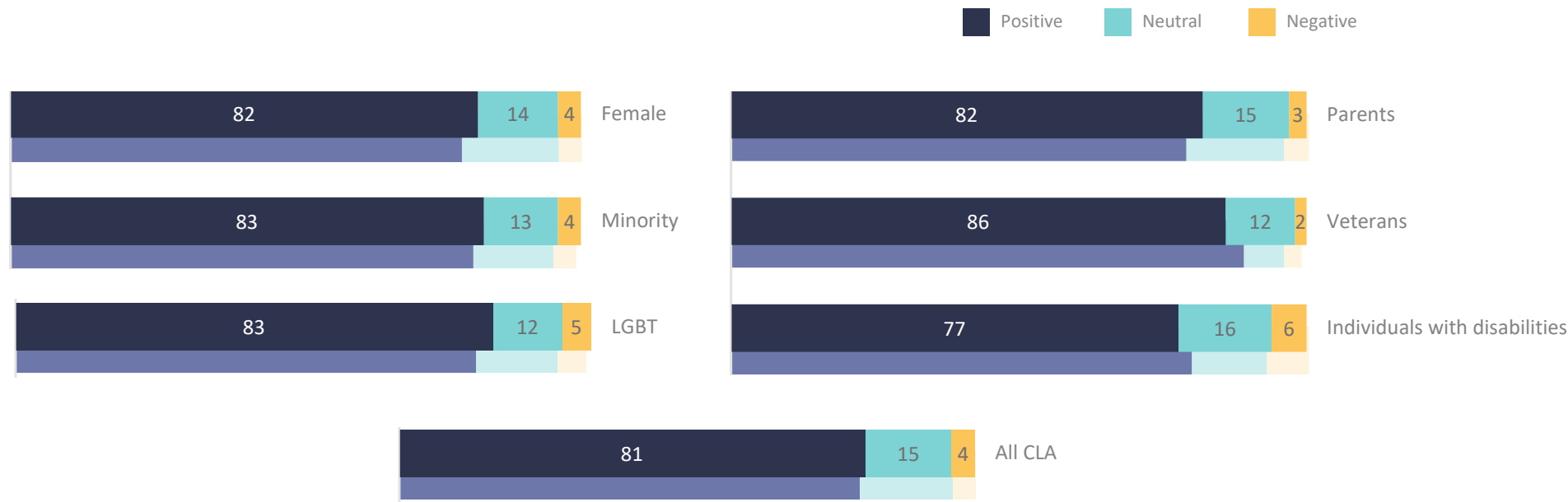
Numbers are shown in percentages.  
Darker bar in each category indicates Dec-21 results;  
Lighter bar in each category indicates Feb-21 results.



EMPLOYEE ENGAGEMENT

Survey results reflect a collective sense of belonging

When the CLA family was asked whether CLA is a great place to work, we learned our people are engaged. Hearing their voices helps us elevate our culture, creates strong connections, and builds a sense of belonging.



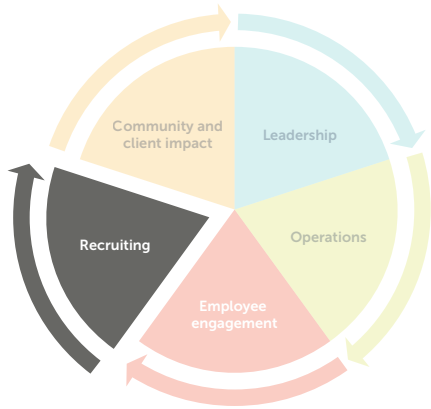
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# RECRUITING

Growing our CLA family

## RECRUITING

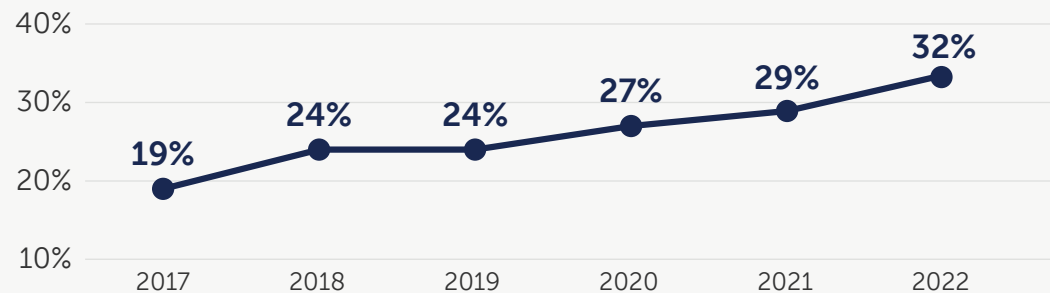


In 2022, nearly 32% of new hires were BIPOC, and over the last five years, we've increased our BIPOC population by 68%. Retention of our underrepresented communities has also improved, and is up over 11% in the last 12 months.

Our efforts to better reflect the communities we serve and live in continue. The next two pages highlight our plans.

We have seen the percent of our CLA family who are BIPOC grow considerably in recent years. Between 2019 and today, our BIPOC population has grown from 14.6% to 19.4%. This 32.8% jump is just a start, and is due in large part to our considerable efforts in recruiting (which can be seen in the chart to the right).

BIPOC — Hiring Percent by Year





## RECRUITING

# Creating opportunities for inspired careers

Through our increased presence on campuses where we've had long-standing relationships — and the commitments we're making to build relationships with new campuses — the next generation of our CLA family is becoming more diverse. Our presence goes beyond simple campus events. We stay connected with campuses throughout the year and interact with students more than ever. We've also made a commitment to build a relationship with every NABA chapter on campuses where we recruit.

To hire top candidates without bias and bring the wealth of diversity and customs that fully reflect the communities we serve, we have:

- **Helped** seed NABA's Pathway to College program for future accounting students.
- **Started** a framework to help high school students discover and experience the accounting industry.

We are buoyed by our recent hiring trends:

**36%**

Veteran hiring is up 36% in the past two years.

**32%**

Minority hires increased to 32% of total hires in 2022.

**60**

We are deepening our relationship with minority-serving institutions and historically Black colleges and universities, with a presence on more than 60 campuses.



“Once I learned about CLA and then did the research, I saw the opportunity. It’s a place you can continue to grow.”

– LAUREN GAINER  
HUMAN RESOURCES CONSULTANT  
AT CLA

## RECRUITING

# NABA Recharge Conference recruiting success

In June 2022, 42 family members attended the national NABA Recharge Conference in Hollywood, Florida. Nine talent acquisition team members along with several others interviewed over 40 candidates, leading to 11 new people joining the CLA family.





# COMMUNITY AND CLIENT IMPACT

Committing to building relationships



PEOPLE  
LOVING  
NASHVILLE



## COMMUNITY AND CLIENT IMPACT

# Impact in the accounting profession

In 2022, we increased our investment in our corporate sponsorship with NABA, committing \$1 million over five years to seed its Pathway to College program, which will work to bridge the opportunity gap for Black accounting and finance professionals.

The AICPA National Commission on Diversity and Inclusion (NCDI) appointed a CLA representative to serve on the commission. In 2022, Nancy Brown, CLA's chief culture and engagement officer, represented CLA on that team. Their committee is focusing on expanding the diversity of the accounting profession through high school outreach.

NABA recognized Jen Leary, CEO, with the Diversity, Equity, Inclusion, and Belonging Leader of the Year award. Each year, NABA recognizes stellar achievers who have gone beyond the call of duty to reach distinct success in their careers and within NABA, the profession, or their community.

*"At CLA, we believe in continuous learning and taking action to drive change. Our collaboration with NABA is critical to helping us have a strong, diverse CLA family well into the future."* – **Jen Leary**



"Our teams are passionate about inclusion and belonging at CLA. It is essential that we bring a diverse mix of voices to continue to advance our industry and profession."

– **NANCY BROWN**  
CHIEF CULTURE AND ENGAGEMENT  
OFFICER





## COMMUNITY AND CLIENT IMPACT

# DEI, community engagement, and the CLA Foundation

Our community and client engagement efforts are designed to unify the work and missions of DEI, the CLA Foundation, our community engagement team, and our client service efforts.

### Community involvement

When CLA expanded into Nashville, we connected with the Nashville Entrepreneur Center to provide mentorship and support for BIPOC entrepreneurs through the [Twende program](#).

In 2022, we invited Twende participants to present their entrepreneurial journey. During our corresponding community event with Hands On Nashville, CLA family members packed a total of 1,800 kits for Hispanic families in need, teacher appreciation week, and the local homeless population.

### Entrepreneurial playbook

2022 brought the beginnings of a playbook to help grow our relationships with BIPOC entrepreneurs. As a result, our Nashville and Dallas locations donated time in business incubators to support entrepreneurs of color and help them thrive. In Dallas, CLA sponsored a pitch competition for Black female entrepreneurs, donating consulting hours to the top 10 finalists.







## COMMUNITY AND CLIENT IMPACT

# CLA Foundation — impact in our communities

The CLA Foundation's vision is to see our funding reflect the many affinities important to the CLA family. So we connected more intentionally with our VBCs — generating the first nominations for funding organizations representing the LGBTQ+ community and increasing nominations for charities focused on disabilities, Veterans, and BIPOC.

In addition to our two grant cycles, we renewed strategic grant support to organizations supporting diverse networks: American Corporate Partners, the Nashville Entrepreneurship Center — Twende program, and NABA.





Advancing diversity, equity, and inclusion is a continual commitment.

**Commit with us.**

Diversity, equity, and inclusion is — and will remain — a work in progress at CLA. We must continue working to eliminate bias, expand our cultural knowledge, and welcome everyone into our family. Doing so will make us stronger, more competitive, and more prosperous. Doing anything less would be a violation of our cultural values.







*We'll get you there.*

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