



# DIVERSITY, EQUITY, & INCLUSION STATUS REPORT

## OUR JOURNEY

April 2023



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“Among our core values is collaboration and connection with the communities in which we operate. I believe we have great opportunities to help the insurance industry as a whole move further toward diversity, equity, and inclusion. Our aim is to promote diversity of opinion and diversity of thought—and the foundation for that is ensuring we have diversity in our workforce.”

Joseph G. Murphy, President & CEO, Coverys

# I. EXECUTIVE STATEMENT



**José Zorola**

Almost three years ago, we started this journey to address what diversity, equity, and inclusion might look like in our organization.

After the horrific murder of George Floyd and the rise of the Black Lives Matter movement in 2020, Coverys made a commitment to change for the better, stand up taller against inequality, and support diversity, equity, and inclusion. To do so, we embarked on a journey to further our understanding and exhibit and promote the behavior we expect to see in others.

We started by re-examining our policies, procedures, and practices to ensure they fully represented our commitment. We engaged a consultant to develop a Diversity, Equity, and Inclusion (DE&I) plan to support our collective belief in equity as well as our appreciation for culture and diversity. Our DE&I plan includes important steps: listening to our employees, offering training opportunities designed to deepen awareness, and integrating DE&I into the fiber of our organization.

In addition to training opportunities, Coverys created a DE&I Advisory Council, DE&I Steering Committee, and dedicated Resource Groups, and we extended our volunteer day program and declared Juneteenth as an official company holiday. In addition, we committed \$250,000 to the NAACP Legal Defense Fund and additional donations to organizations that address social injustice.

After creating the right foundation and infrastructure to support our DE&I efforts, we are now at a place of growth. We are expanding our Resource Groups, both in number and capability. In addition, DE&I will be a part of our onboarding process, recruiting, leadership development, and more. This ensures that we live and breathe inclusivity in all that we do.

Our work thus far has stood as an important reminder of the value of diverse voices and inclusive practices, and as a recognition of the importance of our DE&I journey. It has been truly inspirational to see the impact of Coverys' collective engagement and the power of what our employees have so far accomplished together.

DE&I is a critical part of Coverys' mission and values. Not only does it ground us in an internal commitment to embracing a more inclusive workplace, it also reinforces our belief in a truly equitable society as a whole.

We know that by embracing this journey together, we all stand stronger together to build a better world. And we wouldn't want it any other way.

Sincerely,

A handwritten signature in black ink that reads "José Zorola". The signature is fluid and cursive, with a long horizontal stroke at the end.

**José Zorola**

Head of Diversity, Equity, & Inclusion

## II. THE JOURNEY

In September 2020, Coverys began working with Leading Culture Solutions (LCS), a consultant specializing in corporate cultural transformation and strategic planning, to join us on our journey and commitment to becoming a more diverse, equitable, and inclusive organization. We worked with LCS to transform our organization by weaving DE&I into our corporate culture.

“DE&I means an opportunity to be curious, to ask, and to listen.”

Scott Weber, Interim CEO, Archway Health

### A. OUR VOICES

Coverys began our journey by reviewing current policies and procedures to see where DE&I opportunities may exist and surveying more than 700 employees about their opinion of our company culture. We also reached out to colleagues to collect focus group and interview responses. This information provided us with insight into potential areas for improvement and helped us create a customized plan for the next phase in our journey.

“Remember that being part of a diverse organization leads to a greater professional experience for you. In addition, research has demonstrated that the business benefits from a diverse workforce through higher profits and increases in innovation.”

Susan Pérez Dembeck, President of Med-IQ

### Preliminary Survey

Results from our first DE&I Survey in 2020



agreed/strongly agreed that they receive meaningful recognition for doing good work.



agreed/strongly agreed that they feel like they belong at the company.



agreed/strongly agreed that they have what is needed to be their best selves at work.



agreed/strongly agreed that they believe Coverys' leadership will take appropriate action in response to incidents of harassment.



agreed/strongly agreed that they felt like they had an advocate to help them succeed within the company.

## Coverys DE&I Road Map

Based on the internal survey results, in 2021, we developed a road map to guide our journey. Employees across the company identified our Central Challenge and the DE&I Council identified our Purpose, Direction, and Values.

### Purpose

We exist to build and support a culture where the whole community is valued for their similarities, differences, and unique experiences.

### Direction

We live to be an inclusive, diverse, and equitable community.

### Central Challenge

To develop consistent, intentional practices to integrate DE&I in thought and action at all levels in the organization.

The goal of developing this road map was to correlate our existing mission, vision, and values with our DE&I objectives.

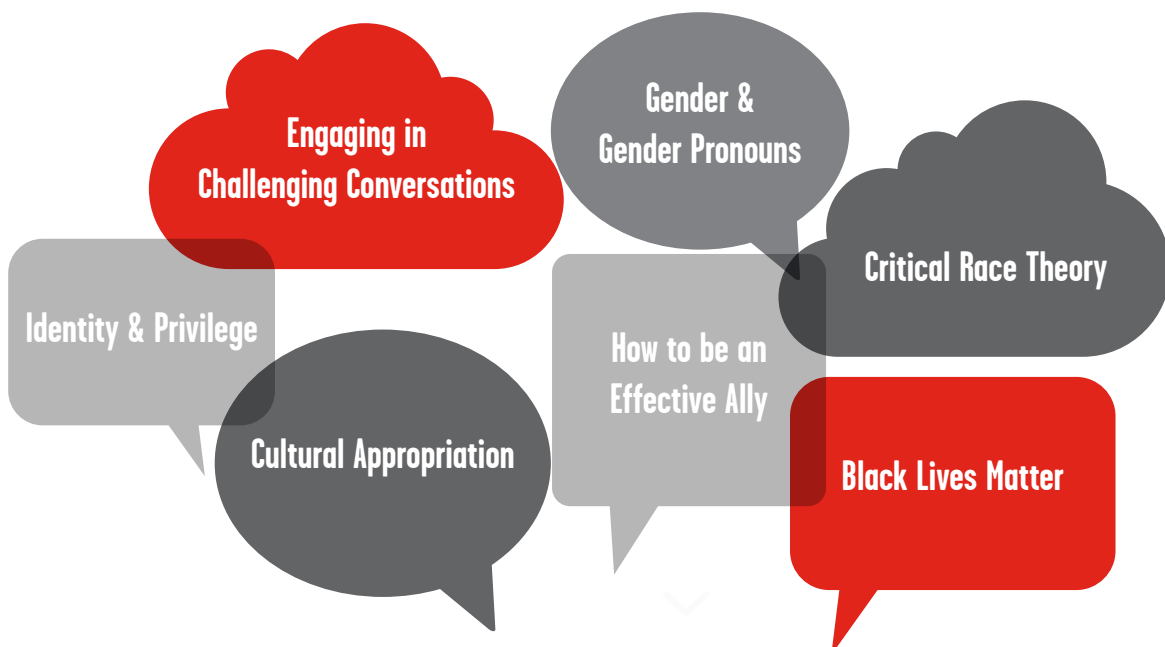
We then established strategic priorities and initiatives for which the Workforce Resource Group helped create Key Performance Indicators.

## B. UNDERSTANDING DE&I LANGUAGE

In this stage, we prioritized learning about different concepts and terms. We did this by hosting Coverys Community Conversations (CCC) and Town Halls to make the connection between DE&I and the business case and to normalize having conversations about these topics. We had trainings for senior leaders and individual contributors to solidify our “Why.”

**Coverys Community Conversations** are internal talks led by Coverys staff and external speakers addressing DE&I topics. We have hosted 18 CCCs since 2021. Each CCC received excellent feedback from the attendees.

CCC topics covered were:

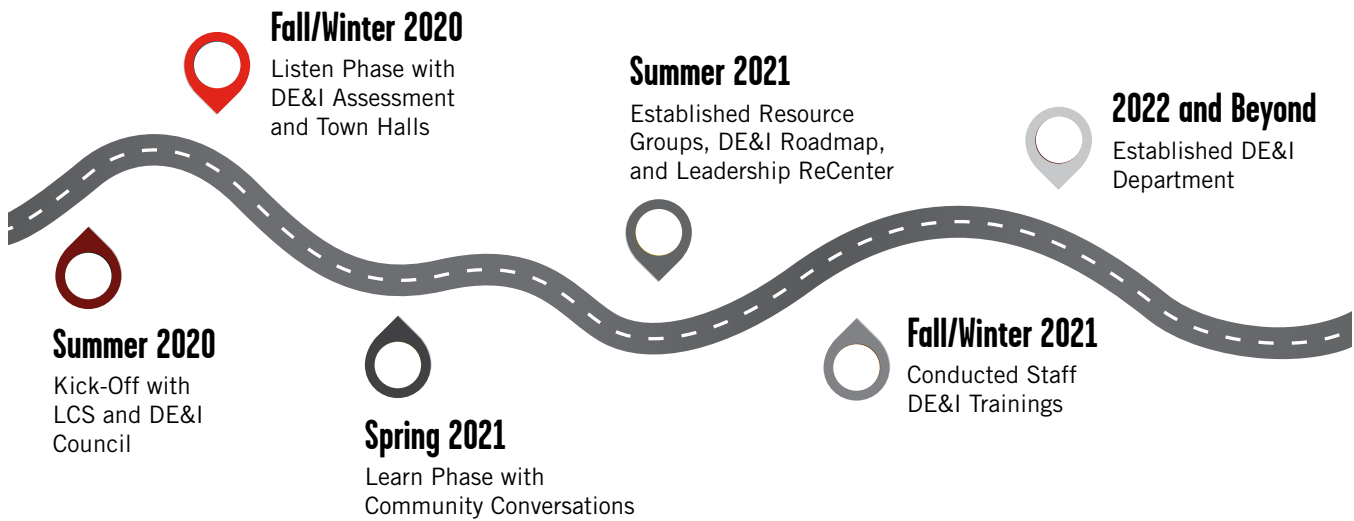


**Town Halls** are formalized learning and discussion meetings discussing specific DE&I topics. Since beginning our journey, we have hosted many of them and received great participation and feedback as well. The initial DE&I Town Hall discussions revolved around educating ourselves on what to expect as we embarked on this path. The first such discussion focused on a diverse perspective: a panel of senior leaders from outside healthcare organizations discussed their respective DE&I journeys. The subsequent DE&I Town Hall focused on exploring our “readiness.” Others topics have included: Black Health and

Wellness, Suicide Prevention Awareness, Destigmatizing Mental Illness, Celebrating Different Holiday Traditions, and Charitable Giving.

**Staff DE&I Training Programs** were enacted in summer 2021. Coverys managers participated in DE&I Leadership Re-Centering. We began DE&I training for non-management staff in early 2022. The training consisted of three modules and online courses designed to increase DE&I language proficiency, cultural competence, build skills for creating inclusive spaces, and understand the business case for change.

## Timeline



As we continue on our path, DE&I is critical to creating an engaged and productive employee culture. While there isn't a one-size-fits-all approach to implementing a successful DE&I program, we've started by understanding what DE&I is and the value it can bring to Coverys. It is exciting to be a part of our colleagues' conversations through DE&I training, resource group discussions, and the DE&I Advisory Council.

We are currently witnessing many changes in our world, and it is critical that our colleagues have a sense of belonging and that their voices are heard. This fosters higher degrees of engagement, productivity, and innovation that should contribute to increased revenue.

**“As a DE&I council member, I have had the privilege of supporting and encouraging Coverys' journey to ensure that DE&I is an integral part of its fabric. While Coverys had already strategically acknowledged the value in the enhancement and evolution of its culture, the establishment of the DE&I Council further empowered Coverys' drive toward cultural consciousness that unifies and sets profound direction.”**

**Sara Salman, Strategy Execution Specialist, DE&I Council Member, Coverys**

“A diverse and inclusive culture encourages engagement, an engaged workforce solves problems, problem-solving leads to innovation—to me, DE&I means encouraging everyone to participate as though they have “a seat at the table.”

**Michelle Smoljan, Associate Director, Sales & Marketing Department, Med-IQ**

“In the BIPOC RG, we speak about relevant and timely matters that uniquely affect the BIPOC community. Evidence-based research shows the value of having an inclusive workplace as well as a safe, brave space for underrepresented employees to have open dialogues. Anecdotally, we strive to encourage one another through solution-based conversations. I’m happy to serve the BIPOC RG in this way.”

**Jenelle Arnao, Risk Consultant, Risk Management, Coverys**

## Accomplishments To-Date

Coverys has been undertaking many initiatives to promote education to lay the groundwork for organizational growth:

### COVERYS DE&I ADVISORY COUNCIL

The Coverys DE&I Advisory Council is an integral component of our commitment to drive and implement measurable change in diversity, equity, and inclusion. Council members collaborate across the organization to ensure all voices are heard. They support and promote diverse ideas and solutions and create opportunities for mentoring, career development, and other inclusion initiatives.

The Council is comprised of employee-led, self-directed volunteers who help ensure the company develops consistent, intentional practices to integrate DE&I in thought and action at all levels of the organization.

### RESOURCE GROUPS

Coverys Resource Groups (RGs) provide a forum for staff to learn about and discuss specific DE&I topics. Additional benefits of RGs include the development of future leaders, increased employee engagement, and expanded marketplace reach.

#### Workforce Resource Group

The Workforce RG’s mission is to engage our workforce through regular meetings in an effort to inform, solicit feedback, and understand overall impact. Additionally, this platform allows us to hear directly from our people to better assess our organizational needs and culture. Since its establishment, the Workforce RG has been instrumental in helping inform changes relating to return to office, benefits, and compensation programs.

#### Black, Indigenous, & People of Color (BIPOC) Resource Group

Launched in late 2021, this RG acts as a network for members of the BIPOC community and allies to discuss specific challenges and advocate for BIPOC peers in professional development, equitable treatment, and access to opportunities. Since its establishment, this RG has hosted discussions on healthcare disparities in Black communities, affirmative action, and more.

“As we continue our DE&I journey, the Women’s Resource Group supports our goals to create a supportive environment where women can share experiences, build knowledge, and develop relationships to enhance career growth and personal development.”

**Katie Perry, Director, Product Development, Coverys**

“The RG provides greater meaning and purpose to our work by allowing us to help the women in our organization grow personally and professionally. By working to support, educate, and empower our women, we foster allyship, we build connection across the organization, and we give our women the tools to thrive.”

**Sasha Sagalovich, Women’s RG Co-Lead**

“Self-care and balance in your life helps you be a happier, healthier, and more productive person. Coverys Cares is here to provide opportunities and skills to incorporate joy and well-being into your life.”

**Josh Hyatt, Manager, Risk Management, Coverys**

“Resource Groups not only allow you to be a part of a team, but they allow you to have a say on that team. These groups are a great avenue to make a difference in the organization.”

**Jocelyn McCarthy, Human Resources Generalist, Coverys**

### **Women’s Resource Group**

This RG exists to build and support a culture where women are valued for their similarities, differences, and unique experiences. The Women’s RG commits to the development of safe environments to discuss topics unique to women, develop education and trainings, create mentorship opportunities, and more. Since its establishment, the Women’s RG has touched upon topics including women’s history month, balancing professional life with caregiving, and dealing with imposter syndrome.

In addition to the RGs mentioned above, Coverys plans to launch resource groups in other identity groups and interests in 2023 and beyond.

### **COVERYS CARES**

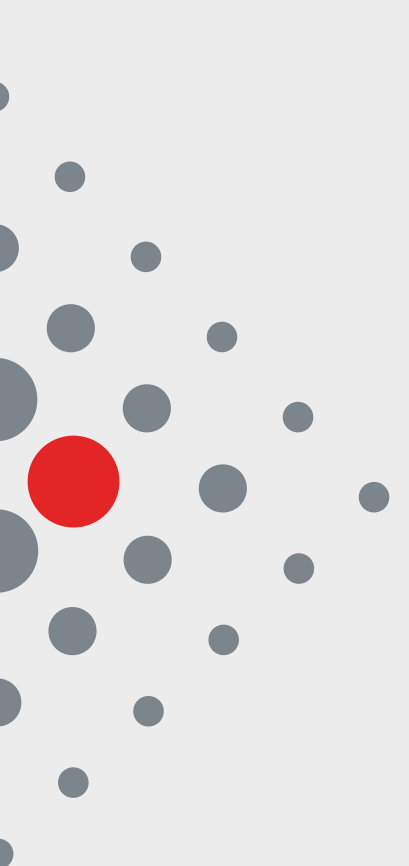
In 2022, Coverys Cares was brought under the DE&I department umbrella and rebranded as Coverys Cares, a well-being resource group. Coverys Cares helps to bring a balanced lifestyle to Coverys employees by increasing health and well-being through means of awareness, education, and activities in these four themes: Community Engagement, Making Connections, Personal Well-being & Resiliency, and Continuous Development Programs. Coverys Cares sponsors Giving Tuesday, Cycle for Survival, monthly Book Clubs, Craft Club, Pets Corner, Coverys Cooks, and many more initiatives.

### **IDEA Committee of Med-IQ, a Coverys Company**

The Inclusion, Diversity, Equity, and Action (IDEA) Committee was formed to help advance Med-IQ’s mission of “Better Healthcare for All.” The Committee works to forge strategic partnerships with organizations and individuals with expertise in addressing health inequities and biases; establish itself as a trusted partner among hospital and health system clients for mindfully designed products and services that address health inequities, their root causes, and different types of bias; and measure and demonstrate the impact of the products and services focusing on health inequities.

In the past year, Med-IQ worked with a diverse group of faculty experts, organizations like the Color of Crohn’s & Chronic Illness (COCCI) and the ECHO Diabetes Action Network (EDAN), and social media influencers. Med-IQ provided education to policyholders, risk managers, healthcare providers, and the general public that addressed root causes of healthcare inequities, medical mistrust, and the harmful legacies of systemic racism in healthcare.





**“We are committed to standing up and speaking out for social equality. This includes looking inward to examine our company culture and identify ways we can address social injustices and positive change both as a company and in our communities. We need to all stand up and do the right thing, we need to speak out against injustice, even if it feels uncomfortable. And it is not just talking about it.”**

**Gregg Hanson, Former CEO, Coverys**

In 2022, Med-IQ launched educational interventions designed to narrow healthcare disparities in a variety of areas, including:

- Black maternal health.
- Chronic kidney disease.
- COVID-19 testing and treatment.
- Hepatitis C virus testing and treatment.
- HIV prevention, testing, and treatment.
- Inflammatory bowel disease management.
- Uterine fibroids diagnosis and treatment.
- Vasomotor symptoms of menopause.

By engaging a broad base of stakeholders – from clinical teams, to patients, caregivers, and the general public – these interventions play an important role in improving care quality and safety, reducing stigma, promoting patient empowerment, and bringing Better Healthcare for All to underserved and marginalized communities.

#### **DE&I Charitable Giving**

An important part of DE&I is giving back to the community.

We committed a total of \$250,000 to the Legal Defense Fund (LDF) over the span of 5 years from 2020 to 2024 to support the fight for social justice.

Additionally, the Coverys Community Healthcare Foundation allocated \$100,000 to the DE&I Advisory Council to donate to organizations that are working to further DE&I.

The DE&I Advisory Council donated \$50,000 each to:

- **Stop AAPI Hate** – An initiative sponsored by the Center for Affirmative Action that tracks and responds to incidents of hate, violence, harassment, discrimination, shunning, and child bullying against Asian Americans and Pacific Islanders in the United States.
- **National Birth Equity Collaborative** – An initiative that creates solutions to optimize Black maternal and infant health through training, policy advocacy, research, and community-centered collaboration.

Coverys Community Healthcare Foundation continues to donate to various organizations that support work for social justice and serve underrepresented communities such as Bridge Over Troubled Waters, ROCA, the Matthew Shepard Foundation, and Will to Live.

## C. FUTURE GOALS

Our journey has only just begun, but already, we are moving forward to integrate education and opportunity into every area of our organization.

**Future goals include:**

1

Internal mandatory training and onboarding, mentoring employees, advocacy.

3

Develop and implement diversity metrics (people and performance).

2

Intentional DE&I recruiting at all levels.

4

Pay and promotion transparency and equity.

## III. THE TEAM

We would like to recognize everyone on the DE&I Council and the IDEA Committee of Med-IQ for their contributions on this journey. Without them, we would not be where we are today.

### The DE&I Council

**José Zorola**, Head of Diversity, Equity, and Inclusion

**Jacqueline Busterna**, Esq., Director of DE&I

**Darlene Harsono**, DE&I Coordinator

**Jenelle Arnao**, Risk Consultant

**William Champion**, VP, Product Development

**Chris Coulter**, Sr. Vice President, Actuary,  
Archway Health

**Erika Eley-Soberanis**, Manager, Claim Operations  
and Reporting

**Penny Evans**, Product Analyst

**Bethany Haskell**, Sr. Manager, Training

**Caty House**, Associate Director, Education Strategy  
& Content

**Josh Hyatt**, Manager, Risk Management

**Lynelle Jackson-Evans**, Business Development Leader

**Sarah Javin-Fisher**, Marketing Communication  
Manager, Coverys Managing Agency

**Jocelyn McCarthy**, Human Resources Generalist

**Katie Perry**, Director, Product Development

**Peter Ramirez**, Claim Reporting Representative

**Samantha Reiss**, Underwriting Support Associate

**Sasha Sagalovich**, Claim Consultant

**Sara Salman**, Strategy Execution Specialist

**Michelle Smoljan**, Associate Director

**Michael Villanueva**, Product Systems Analyst

## The IDEA Committee

**Nicole Greenberg**, Marketing and Design  
Associate, Co-Chair

**Jill Weaverling**, Manager, Healthcare Education  
Technology, Co-Chair

**Susan Dembeck**, President, Med IQ

**Allison Gardner**, PhD, CHCP, Sr. VP Educational  
Strategy & Content

**Stephen Koster**, Q-VP, Corporate Initiatives

**Sara Samuel**, Clinical Content Manager

**Michelle Smoljan**, Associate Director,  
Sales & Marketing Department

## Special thanks to former DE&I Council and IDEA Committee members who have left a tremendous legacy on DE&I at Coverys:

**Ronald Dunlap**, MD, Liaison to the Coverys  
Board of Directors

**Ariel Crohn**, Corporate Meetings, Travel Manager

**Erica Stellato**, Learning and Development Specialist

**Erin Bagley**, Senior Vice President and General Counsel

**Julie Blum**, Sr. Clinical Content Manager, Med-IQ

**Meg Bronneck**, Chief of Staff

**Margaret Das**, PhD, RMPS Education and  
Outcomes Manager

**Benjamin Goldberg**, Manager, Complex Claims

**Samantha Gordon**, Accreditation Manager, Med-IQ

**Josie Keenan**, Client Support Specialist,  
Risk Management and Analytics

**Amy MacKay**, Administrative Assistant, Underwriting

**Bongani Mngomezulu**, VP, Analytics & Product  
Management, Archway Health

**Erin Mullen**, Manager, Underwriting

## Thank you to the team at Leading Culture Solutions, our consulting partner, for their guidance.

**Andréa Hawkins**, Founder & Project Lead  
(Leading Culture Solutions)

**Liz Fisher**, Sr. Collaboration Partner  
(Leading Culture Solutions)

**Tasheenah Brown**, Collaboration Partner  
(Leading Culture Solutions)

**Cheryl Grayson**, Sr. Collaboration Partner  
(Leading Culture Solutions)

**Shannon Burke**, Collaboration Partner  
(Leading Culture Solutions)

**Micah Barber-Smith**, Administrative Assistant  
(Leading Culture Solutions)

## We would also like to thank our Executive Steering Committee Members for their commitment, guidance, and investment into DE&I.

**Joseph Murphy**, CEO & President

**Jenelle Arnao**, Risk Consultant, Risk Management

**Liz Brodeur**, Sr. VP, General Counsel

**Jacqueline Busterna**, Esq., Director of DE&I

**Eric Crockett**, Sr. VP, Information Technology

**Susan Dembeck**, President, Med-IQ

**Noreen Sarno**, Sr. VP, Human Resources

**Tara Gibson**, Sr. VP, Claims

**Darlene Harsono**, DE&I Coordinator

**Amanda McHale**, VP, Underwriting

**Susan Montminy**, Director, Risk Management

**Beth Murphy**, VP, OL&D

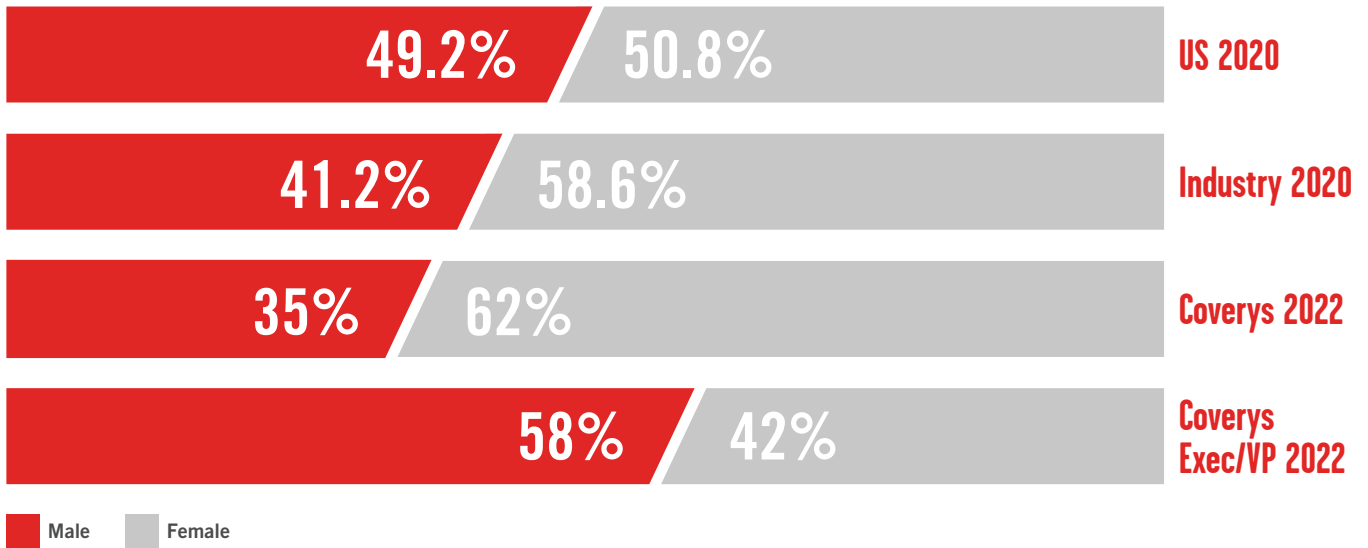
**Michelle Smoljan**, Associate Director, Med-IQ

**Scott Weber**, Interim CEO, Archway Health

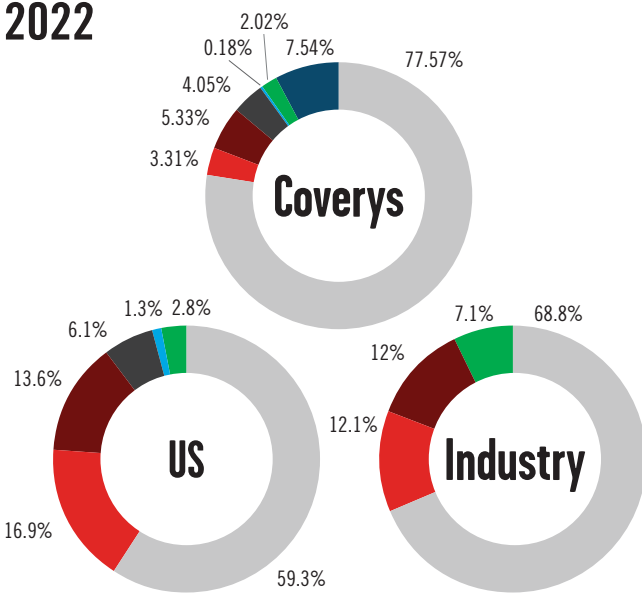
**José Zorola**, Head of Diversity, Equity, and Inclusion

# IV. APPENDIX

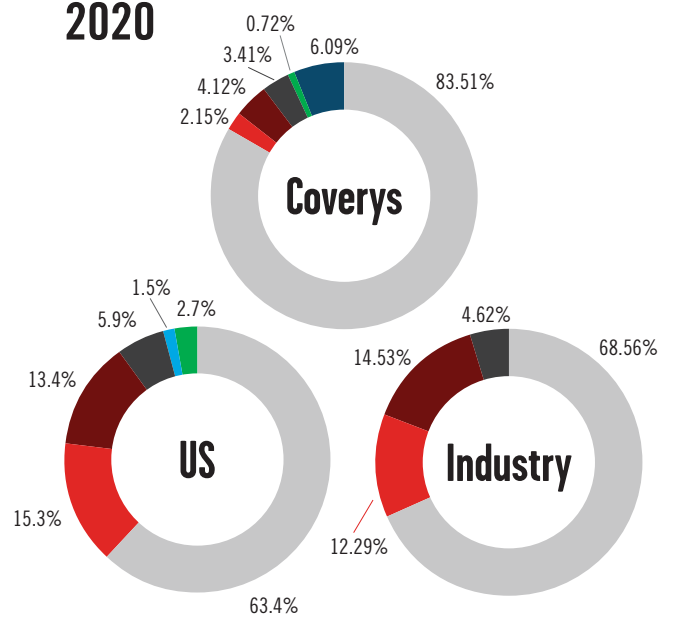
## DEMOGRAPHICS AS OF JULY 2022



2022



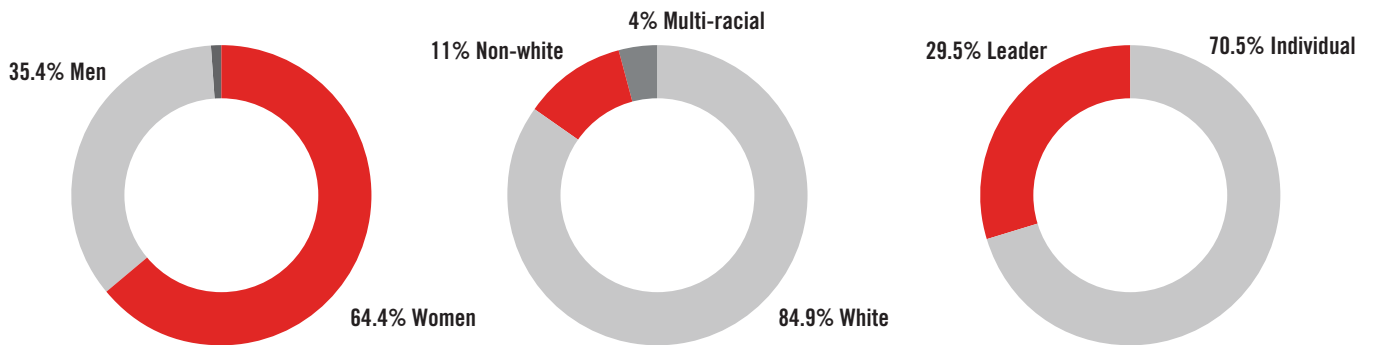
2020



White Latinx Black Asian Native American Two or More Races Undeclared

# 2020 SURVEY DEMOGRAPHICS

530 employees, or approximately 84% of Coverys staff, participated in the survey.



## Citizenship

