

2023

ANNUAL REPORT



AWIL
ADVANCING WOMEN
IN LEADERSHIP

Empowering Women: Paving the Path to Progress



*Your questions,
feedback, and
perspectives
are invaluable.*

As we embark on another year of progress and growth, we want to reflect on the strides made in our commitment to championing women in leadership through Advancing Women in Leadership (AWIL), our chief Diversity, Equity, and Inclusion (DEI) initiative.

This annual report encapsulates our dedication to fostering an inclusive workplace where every woman has the opportunity to thrive and contribute to our collective success. Diversity and inclusion are not just organizational goals but essential pillars of our identity.

As you delve into this year's annual report, we ask you to consider actively engaging with AWIL this year. Your questions, feedback, and perspectives are invaluable as we collectively strive to create a workplace where diversity thrives.

AWIL has a [refreshed page](#) on the new FirmPoint, where you can engage with us and find the materials mentioned in this report.

Thank you for your support and commitment to our shared vision. Together, we are paving the path to progress and empowerment for women at CSH.

KERRY ROE

President

TIFFANY WHITE

AWIL Co-Chair

BRITTANY LAWRENCE

AWIL Co-Chair

MISSION

Increase the number of women at our management levels and provide women with equal opportunities for impact and influence throughout the firm and community.

VISION STATEMENT

Gender diversity in business has been shown to result in more innovative client service teams, and ultimately, a more successful firm. In order to address this issue, we must focus on career advocacy/advancement and career-life integration via strategies at both the individual and organizational level as well as increase the number of woman role models.

GOALS

- Foster a positive and inclusive work culture for women that values and leverages our women's talents, voices, and ideas
- Make tailored career and business development opportunities available at each level to strengthen our pipeline of women who are well trained for leadership roles
- Increase the number of women shareholders and women in leadership roles

AWIL Strategic Plan Overview



By the Numbers

4 OUT OF 7

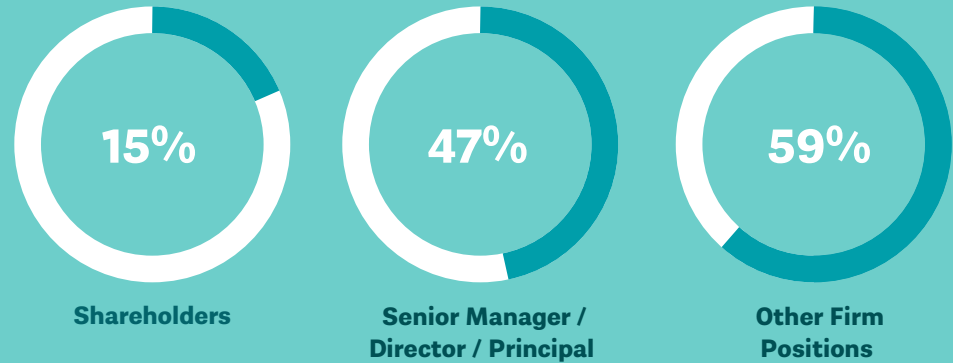
C-Suite members are

WOMEN



STRATEGIC STATEMENT

As of June 2023, we've reached these levels of women representation across the firm:

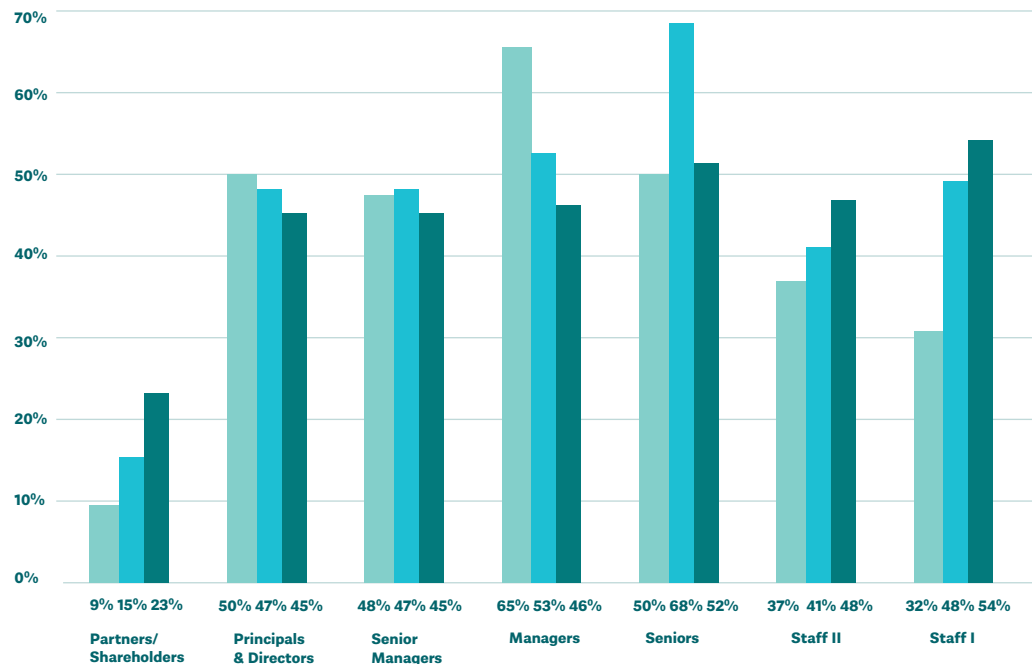


Women at CSH and Across the Industry

CURRENT DATA



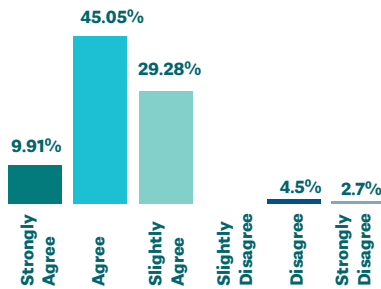
*AICPA 2019 CPA Firm Gender Survey. Data is from firms with 100+ CPAs.



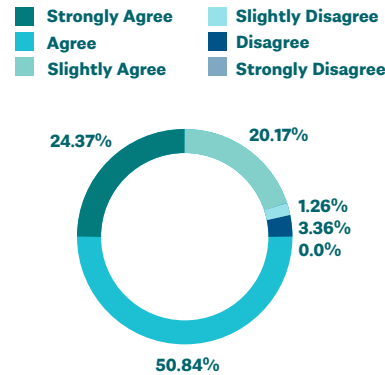
In 2023, we combined the AWIL and DEI surveys to streamline how we receive feedback. We have four AWIL subcommittees that use these insights to develop strategic focus areas: Culture Enhancement (led by Renea Irick); Education, Resources, and Events (led by Tricia Werst); Advocacy (led by Keri Boergert); and Communications (led by Heather Churchman).

Do you have suggestions for questions or themes for this year's survey? [Email AWIL@cshco.com](mailto:EmailAWIL@cshco.com). The following pages show last year's AWIL and DEI survey results. Thank you to everyone who participated!

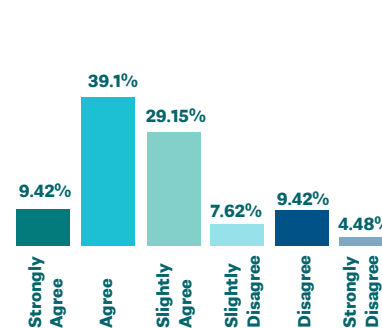
The Firm's effort to retain and develop women leaders has helped others that I know to identify potential barriers to their success.



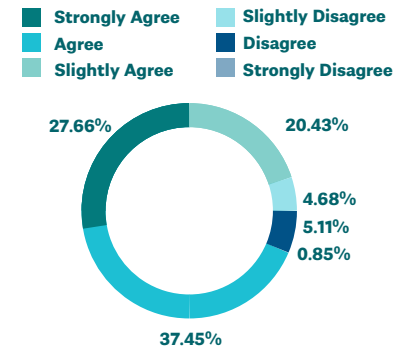
I understand how I can impact or increase my value contribution to the Firm.



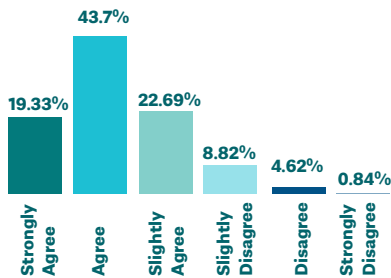
The Firm's efforts to retain and develop women leaders have helped me personally to identify potential barriers to my success.



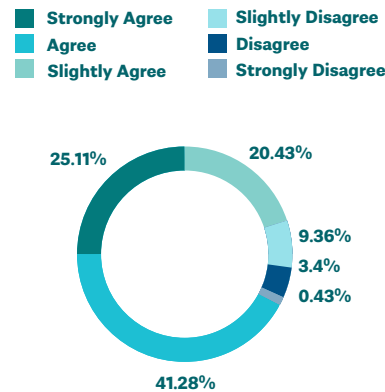
I feel I have someone at the Firm who understands my vision for my career and life and is there to assist me when I am challenged with this integration.



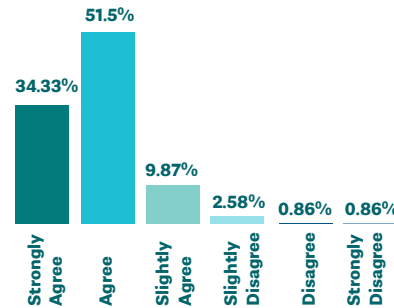
I understand how to advance to the next level of my career at the Firm.



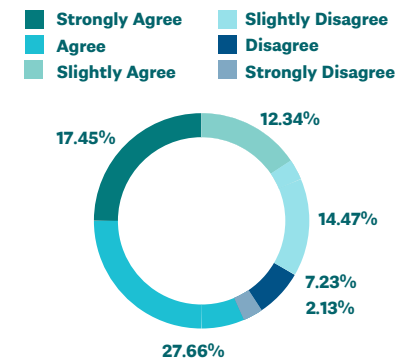
I wish to advance to the next level in my career at the Firm and I believe that it is possible.



I have increased my contribution to the Firm and/or my client engagements during the past year.



I feel I have a sponsor in the Firm who has my long-term career interests in mind and works with me to ensure I have the proper assignments and information necessary to continue my advancement.



Is your sponsor a man or woman?

Woman: 42.52%
Man: 57.48%

Are you currently a sponsor for another individual at CSH?

Yes: 15.15%
No: 84.85%

Education, Resources & Events for Women Across the Firm

Here's a snapshot of AWIL in action across the firm - empowering our women, giving back to our communities and networking with clients, prospects and referral sources.

EXPECTANT MOTHER'S PACKET

A comprehensive guide for expectant mothers at CSH, the [Expectant Mother's Packet](#) helps expectant mothers at various stages of their pregnancy journey. It details the Family and Medical Leave Act and Short Term Disability policies, the importance of healthcare provider certification, and the need to manage benefit coverage during leave. Personal testimonials add a supportive touch to this resource, fostering a sense of community among expectant mothers at CSH.

AWIL ADVOCACY TOOLS—MADE FOR YOU!

The AWIL Advocacy Committee has created three tools to help give all CSHers more resources for advocating for themselves within the firm and outside of it. These tools are not just for women or AWIL members, but for everyone to reference and, we hope, learn from.

- [AWIL How Can Leadership Help Tool](#)
- [AWIL Sponsorship Tool](#)
- [AWIL Effective Connectivity Tool](#)

CSH LITTLE STAR PROGRAM – MENTORS FOR MOMS

The CSH Little Star Program is a group of women who may or may not have known each other before having children who join forces to navigate the world of motherhood together.

This program will pair an expectant mom with a current CSH Mom Mentor that will be a resource to help navigate pregnancy, maternity leave and return to work. Participants can sign up at any time during pregnancy or after their return to work.

OHIO SOCIETY OF CPAS & AMERICAN INSTITUTE OF CPA EVENTS

CSH is a corporate sponsor for the OSCPA event each year. We sponsor a student to attend the conference, and we send at least eight employees. In July 2023, twelve women from CSH attended the [Women, Wealth, and Wellness Conference](#). One attendee said it was the best conference she'd ever attended!

AICPA has a three-day national conference each year, and CSH sponsors attendance for 2-3 employees. Both of these conferences are excellent opportunities to meet likeminded professionals and learn new things in a new environment.

If you're interested in attending either event, complete the [AWIL Conference Request Form](#).

VIRTUAL EVENTS

AWIL groups firmwide organized multiple virtual events with outside speakers this past year to provide education and opportunities to help people at CSH develop confidence and build their personal brand. Find links to these and other [AWIL events on FirmPoint](#).

We hosted these events in 2023 and early 2024:

- Conscious Leadership Webinar
May 2023
- Confidence Building Webinar & Workshop
November 2023
- Breaking Barriers: The Power of Women in Business Development Webinar
July 2023
- AWIL Update 2024: Progress and a Path Forward
January 2024



AWIL Leadership



BRITTANY LAWRENCE

AWIL Co-Chair
Northern Kentucky



HEATHER CHURCHMAN

Communications
Subcommittee Chair
Cincinnati, OH



TIFFANY WHITE

AWIL Co-Chair
Columbus, OH



RENEA IRICK

Culture Enhancement
Subcommittee Chair
Springfield, OH



KERI BOERGERT

Advocacy
Subcommittee Chair
Cleveland, OH



TRICIA WERST

Education, Resources,
& Events Subcommittee Chair
Miami Valley





AWIL
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IN LEADERSHIP

CLARK SCHAEFER HACKETT'S
ADVANCING WOMEN IN LEADERSHIP

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CSH's internal women's committee, dedicated to increasing gender diversity in our management levels and providing women with equal opportunities for impact and influence throughout the firm and community.