

GROOM
LAW GROUP

DIVERSITY, EQUITY, AND INCLUSION

ANNUAL UPDATE • 2022

GROOM LAW GROUP, CHARTERED

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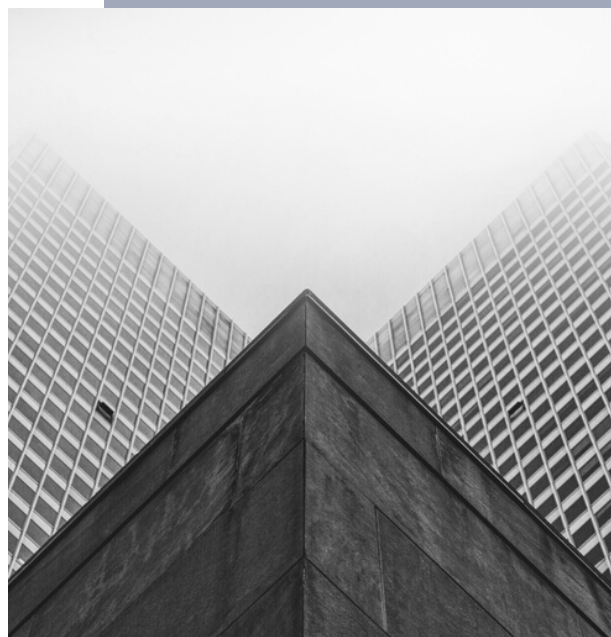
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OUR COMMITMENT

Groom Law Group Chartered's ("Groom's") diversity, equity, and inclusion programs focus on hiring, retention, and advancement of diverse attorneys within our firm, as well as the creation and sustainment of pipelines for our future colleagues. Here, we share an update of our recent diversity, equity, and inclusion activities.



MESSAGE FROM OUR EXECUTIVE PRINCIPAL



Each small step towards creating an equitable and inclusive community of lawyers that reflects our diverse society brings us closer to the shared vision we have for Groom. We aim to be not only the preeminent benefits, health, and retirement firm, but one that helps make the world healthier and wealthier for all. As such, Groom will continue to prioritize reflecting the broad experiences and backgrounds of our clients and the community that we serve.

DEI is more than just lip service – it is an essential component of our culture and ingrained in our values of accountability, communication, excellence, innovation, respect and trust.

The progress that our DEI Committee has made is commendable and, in acknowledging that, I also recognize that the job is never done. We are on a journey which has no finish line, and successes will continue to be achieved through incremental improvements and staying focused on delivering value through the creativity, talent, and diverse perspectives of all Groom employees. We will not waiver when faced with challenges, but remain committed to enhancing the ability of every person to live authentically in supporting an inclusive environment for all.

- Christine L. Keller, Executive Principal

MESSAGE FROM OUR DEI CHAIR

I'm so grateful to have the opportunity to serve as Groom's DEI Committee Chair for 2023, having previously served as co-chair in 2022.

First and foremost, Groom remains steadfast in our commitment to progress. From educating high school and college students from historically underrepresented groups about the practice of law to hiring diverse 1L students, Groom has continually expanded our initiatives and efforts to improve diversity within the legal profession. Furthermore, in reflecting and building on the progress made in 2022, I am looking forward to a new year with new goals and a continued commitment to make a positive changes that start within Groom and its own DEI applications to recruitment, advancement, and development.



As Maya Angelou said, "All great achievements require time." It is that level of determination and patience that we use to approach our work in DEI.

In 2022, we decided to focus our efforts around four main pillars – Client Relations, Community, Workforce, and Workplace – each with its own goals and variety of programs and initiatives that will carry on into 2023. We are budding with enthusiasm over the projects we have lined up, such as our pod mentoring program for diverse associates, which came about based on feedback from our new affinity groups (the Collective+) to help develop our talented pool of diverse attorneys. Small groups of associates (or pods) will be paired with principal mentors for quarterly facilitated discussions on a variety of topics, including self-awareness and leadership development. This is an example of one of the many projects created out of the tireless work and efforts of our DEI Committee and its Steering Committee in 2022 that we highlight throughout this Annual Report.

– Viv Hunter Turner, Principal

Our Partners

- Asian Pacific American Bar Association Educational Fund, *Sponsor* •
- George Washington Lamda Law Alumni Association, *Sponsor* •
- George Washington University Black Law Students Association, *Sponsor* •
- Minority Corporate Counsel Association, *LMŷ Scholarship Sponsor* •
- Minority Corporate Counsel Association Creating Pathways to Diversity®, *Sponsor* •
- Move the Needle Fund (Diversity Lab), *Pipeline Collective Participant* •
- National Bar Association Crump Law Camp, *Host* •
- NJ LEEP ((Law and Education Empowerment Project), *Sponsor* •
- Washington Lawyers' Committee for Civil Rights & Urban Affairs Wiley A. Branton, *Sponsor* •
- Western Justice Center Empower, *Sponsor* •
- University of the District of Columbia, *Sponsor* •



GROOM'S DEI ACTION PLAN

Groom's commitment to diversity is grounded in the belief that a diverse group of lawyers provides the best legal advice and most adequately meets the needs of our clients. To this end, we are committed to hiring, developing, retaining, and promoting lawyers and law students from historically underrepresented groups and backgrounds. We further believe that it is critical to increase the numbers of diverse attorneys entering the practice of law, particularly in the employee benefits, health, and retirement space. We will continue to devote substantial time and resources to help propel diverse students through school (at various stages) and to gain valuable experiences and job search skills, so they then may succeed in law careers – either at Groom or elsewhere.

Objectives

- To ensure Groom's continued status as the premier employee benefits, health, and retirement law firm through the creation and maintenance of an inclusive environment.
- To recruit and hire highly qualified law students and lateral candidates of different backgrounds and to provide them with the resources to develop and advance the legal skills required for promotion within Groom.
- To cultivate a culture that offers equal opportunities, development, and advancements for all Groom lawyers to build successful careers.
- To compose talented, diverse teams to deliver a variety of dynamic skills and perspectives to address our clients' needs.
- To create awareness at Groom on the experiences of underrepresented groups in our firm and the broader legal industry, as well as how to be allies.
- To participate in racial and social justice work to improve the broader community for all.



GROOM'S DEI ACTION PLAN

Continued

Actions

As a firm, we commit to:

Increase Investment

- Devote financial resources to implement firm-wide trainings on key topics (including anti-racism, cultural fluency, microaggressions, allyship, and inclusive leadership).
- Provide extensive formal training for junior and mid-level attorneys, as well as mentorship and sponsorship opportunities for underrepresented associates.

Review Policies, Procedures, and Practices

- Conduct assessment of current policies and practices with a focus on addressing cultural and diversity blind spots and on retention of historically underrepresented attorneys.
- Build a pipeline into our firm for women and historically underrepresented candidates with programs to spotlight Groom and our work in benefits and diversity, as well as proactive search, recruitment, and vetting strategies.

Forge Partnerships with the Community

- Continue partnerships with Minority Corporate Counsel Association (“MCCA”), National Bar Association’s Crump Law Camp, the Council on Legal Education Opportunity, Inc. (“CLEO”), diverse bar associations, local law schools, and student organizations to promote diversity and inclusion in the broader legal industry.
- Continue and expand pro bono partnerships with civil rights and civil liberties organizations to support antiracism work, including Legal Aid, Equal Justice Initiative, the Southern Poverty Law Center, and American Civil Liberties Union.

2022 AT-A-GLANCE

Diversity in Leadership

50% Executive Committee

52% firm leaders

16th Anniversary of the DEI Committee. Though the name has evolved over time, including to “Diversity, Equity, and Inclusion Committee” in 2022, the Committee was first established in 2006.

Updated diversity categories for inclusion of non-binary individuals

As of 2022, Groom is a woman-led firm

Established 2 new affinity groups:

- The Collective
- The Collective+

Active monitoring of client teams, firmwide activities (such as webinars), etc. to ensure diverse representation

36% of Groom's hires in 2022 were diverse

ADVANCING PROGRESS

MOVE-THE-NEEDLE 1L DIVERSITY PIPELINE COLLECTIVE

Historically, Groom has participated in 1L mentoring programs to provide diverse students the tools they need to obtain a 2L summer associate position and succeed while they are there. For the first time in 2022, Groom partnered with a client to hire a full-time 1L summer associate to work with us. As a collective participant, Groom committed to providing a paid, split summer internship — similar to the Law in Tech Collaborative started by eBay — to a first-year law student from an underrepresented population. The experience allowed the interns to get a real understanding of the dynamics of outside counsel relationships and the day-to-day experiences of lawyers in different organizations. The Pipeline Collective provided over 25 split-summer internship opportunities around the country during the summer of 2022.



MINORITY CORPORATE COUNSEL ASSOCIATION (“MCCA”) SCHOLARSHIP PROGRAM

Groom is a long-time member of the MCCA. Since 2006, we have supported the MCCA Lloyd M. Johnson (“LMJ”) Jr. Scholarship Program. The goal of the program is to nurture the academic and professional careers of outstanding law students and advance the diversity pipeline to the legal profession by providing financial support for diverse first-year law students. Groom actively participates on the selection committee and has taken our involvement a step further and committed to provide support for all three years of law school for the designated Groom scholar. Our last scholar currently is a first year associate at a prestigious New York City law firm. We have a new MCCA scholar this year, whom we will support through her three years at Columbia Law School.



CRUMP LAW CAMP

We have participated in the National Bar Association's Crump Law Camp since 2005. This program brings high school students from across the country to Washington, DC to learn about legal careers and participate in a mock trial. Three other national minority bars—the Hispanic National Bar Association, the Native American Bar Association and the National Asian Pacific Bar Association – also are involved in the camp. Every summer since 2012, Groom has provided supplies for the camp and hosted a lunch program for the campers in our office.



“

Serving on the firm's Diversity, Equity, and Inclusion Committee was a great way to see first hand the efforts Groom is undertaking in not only supporting and retaining diverse attorneys that already joined the firm but also attracting and hiring diverse attorneys for the future. The DEI Committee has taken a holistic approach to ensuring that Groom's culture and mission are thoughtful, accessible, and welcoming to everyone.

”

- Rachael Hancock,
Litigation Associate

SPONSORSHIPS

Groom has been a sponsor of events for numerous organizations, including the local Chapter of the Hispanic National Bar Association, the Asian Pacific American Bar Association Educational Fund (“AEF”), the National Bar Association (“NBA”), and the DC Women's Bar Association (“WBA”).





AFFINITY GROUPS

Groom understands that the firm's success – its ability to deliver superior solutions to clients – depends on identifying and removing barriers to success for those who are underrepresented in the legal field, particularly in private practice. Groom sponsors four affinity groups that are comprised of a mix of partners, associates and of-counsel.

- **The Collective** brings together attorneys from racially diverse groups and **The Collective+** brings together attorneys from racially diverse groups and the LGBTQIA+ community. The goals of the Collective and The Collective Plus are to allow Groom's diverse attorneys to build relationships within and beyond the group, to support our diverse attorneys, and to provide a space for attorneys to share experiences and strategies that will lead to greater inclusion and integration within the Groom community.
- The **Women's Initiative** promotes retention, advancement, networking, and leadership opportunities for women attorneys at Groom. The Women's Initiative hosts periodic meetings, panels, networking events and provides development tools to support women attorneys.
- The **Parent Affinity Group** allows working parents to trade information, attend programs on technical topics, such as family tax planning, and advise Groom on potential issues impacting parents. Thanks to input from our Parent Affinity Group, the DEI Committee helped create a ramp down/ramp up policy related to billable hours leading to and following parental leave, initiated the MilkStork program for nursing mothers who are traveling, and rolled out the Mindful Return program for mothers and fathers who are returning to the workplace following parental leave.

Groom actively supports attorneys who wish to participate with outside legal affinity groups and covers expenses for those who wish to attend diversity conferences or learning events. Our attorneys have attended conferences hosted by the National Bar Association ("NBA"), Minority Corporate Counsel Association ("MCCA"), LGBTQ+ Bar Association, National Asian Pacific American Bar Association ("NAPABA"), and more.

BUILDING AWARENESS

To enhance the cultural competency of every employee at Groom, the DEI Committee created an awareness campaign to spotlight diversity leaders and movements, as well as heritage months and key holidays.

Committee members share relevant historical information as well as ideas for one to celebrate personally. In addition, the DEI Committee partnered with the firm's Culture Committee to host training that connects diversity-related matters to our values – Accountability, Communication, Excellence, Innovation, Respect, and Trust.

THE LGBTQ+ BAR DEI CONSULTING PRACTICE

LGBTQ+ Inclusion Training

2022
Certified

Groom invited M. Dru Levasseur, Director of Diversity, Equity, and Inclusion of the National LGBTQ+ Bar Association, to hold the workshop, "LGBTQ+ Competency for Legal Professionals", to share ways in which our firm could best support our colleagues, clients, family, and friends in the LGBTQ+ community. The informative program focused on gender identity and expression, ally behaviors, and building safe and inclusive environments. Dru also helped to revamp our voluntary self-identification form.

“

I have been honored to serve on the DEI committee and witness first-hand the commitment our firm has to ensuring that all members of the Groom community are seen and celebrated. The committee called for candid and diverse voices to express their own concerns, experiences, and suggestions to make us all the best allies we can be.

– Margaret Zhang,
Legal Administrative Assistant

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TOWN HALL MEETINGS

The DEI Committee continues its effort to have real and meaningful conversations about race. In 2022, we continued the tradition of hosting town halls for all members of the firm consisting of two engaging and interactive sessions led by Janet Crenshaw Smith of the Ivy Group, both focused on effective allyship. We are continuing these Town Halls in 2023.

Past town halls included,

- "Let's Talk About Race"
- "Respect: Beyond Please & Thank You"
- "Diversity 2.0: Respect Town Hall"



NEWS



Anthony Onuoha, an associate in Groom's Retirement Services practice, was included in the 2022 Lawyers of Color Annual "Hot List," and was also named a Rising Star by the Defined Contribution Institutional Investment Association ("DCIIA") in its 2022 Diversity, Equity & Inclusion Awards (the "Awards").

- Lawyers of Color, with its global online community, is devoted to promoting diversity in the legal profession and advancing democracy and equality in marginalized communities. The process for selecting its "Hot List" honorees employs stringent selection criteria, with their selection committee of editorial staff, fellows, and advisors reviewing nominations from mentors, peers, and colleagues, researching promising candidates, and narrowing down final candidates to those with noteworthy accomplishments.
- The DCIIA Awards honor "individuals who are advocating for or otherwise contributing to member organizations' diversity, equity and inclusiveness." Onuoha was the sole law firm attorney to be recognized in the 2022 Awards and was lauded alongside representatives from leading retirement services organizations.

“

It has been amazing to witness the changes that the Firm and DEI Committee have brought about during my time at the Firm. I am always happy to do my part in bringing about improvements in diversity and inclusion efforts here, and I am very appreciative of the recognition that I have received for such efforts as well.

-Anthony Onuoha
Retirement Services Associate

”

Groom's Christy Tinnes, former co-chair of the firm's DEI Committee, once more took part in the Minority Corporate Counsel Association ("MCCA") 2022 LMJ Scholarship Selection Committee, marking 16 years of Groom supporting the program. The LMJ Scholarship grants scholarships of \$10,000 to students for their first year of law school. In addition to financial support, LMJ scholars are connected with peers, alumni, and mentors, who are available to provide professional support, such as guidance on addressing academic or personal obstacles that arise over the course of their legal careers. Since 2005, the LMJ Scholarship has awarded over \$3.7 million in scholarships to 222 students.



COMMITTEE MEMBERS

Leadership Committee



Viv Hunter Turner
Principal, Chair



Shanna Cramer
Of Counsel



Stephanie Felder
Dir. Professional
Development & Diversity



Joanne Jacobson
Senior Counsel

Advisory Board Members



Sarah Adams
Principal



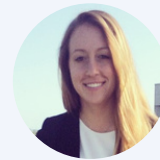
Victoria Allen
Associate



Taylor Costanzo
Associate



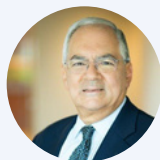
Jennifer Eller
Principal



Haley Goodes
Senior HR Generalist



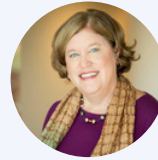
Rachael Hancock
Associate



Lou Mazawey
Principal



Malcolm Slee
Principal



Christy Tinnes
Principal



Margaret Zhang
Assistant

**Others who assisted in DEI matters are past committee members, Katie Kohn, and Anthony Onuoha.

To learn more about Groom's DEI program, please contact:

Viv Hunter Turner, DEI Chair, (202) 861-6324, vturner@groom.com

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