



2023 | DIVERSITY EQUITY & INCLUSION REPORT



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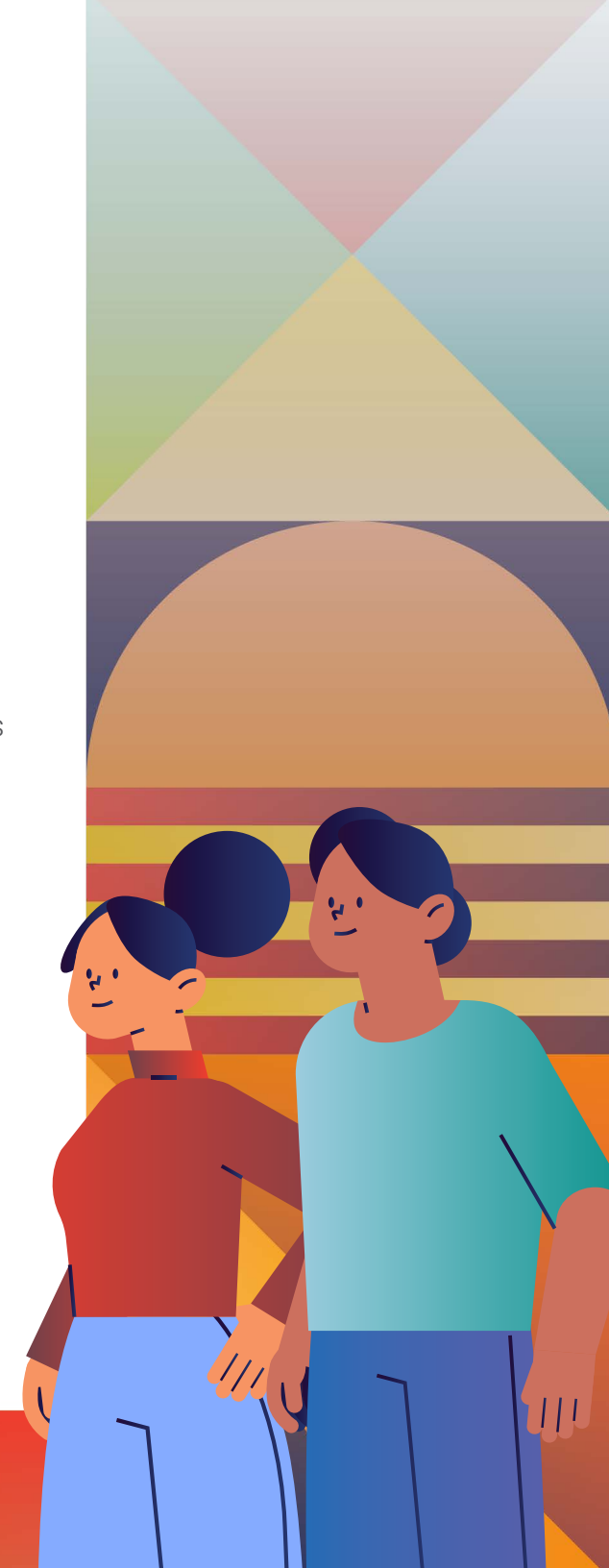
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# Diversity, Equity & Inclusion Matters

Welcome to Consilio's Annual Report on Diversity, Equity & Inclusion (DEI), covering our work in 2023, the fifth full year of our program.

In a year that saw cultural, political, and legal backlash against corporate DEI efforts, many organizations retreated from their DEI commitments. At Consilio, however, we continue to believe that a diversity of backgrounds and viewpoints in our workforce is good for our business; we strive to provide equitable access to opportunities for everyone; and we actively foster a culture of inclusion. Accordingly, instead of pulling back on our DEI program this year, our leadership reaffirmed our commitments and redoubled our efforts.

We devoted substantial focus to improving the **employee experience**. We added to our network of Employee Affinity Groups (EAGs), and we increased the number of employees participating in those groups, including new teammates from our recently acquired companies LOD and SYKE. Through company-wide training and education, we raised awareness among our teams about the importance of DEI principles. We were thrilled to receive another award from [Comparably](#) in 2023: Best Company Culture. This recognition, based on feedback from our employees, demonstrates that they believe Consilio is successfully working to create a truly inclusive culture that values and respects each team member's contributions.

We also worked to enhance Consilio's **client experience** by finding opportunities to partner with our clients in support of our shared DEI objectives. Through candid roundtable discussions, thought leadership and education, and sharing of strategies and ideas, we came together to make progress on the DEI issues most important to our organizations.

Finally, as a global corporate citizen committed to social responsibility, we expanded our work to support the **community experience** for organizations pursuing worthwhile causes. We donated more money, we volunteered more time, and we sent more of Consilio's business to diverse-owned and small enterprises.

As we closed out the year, we decided to adjust the name of our program, moving from "Diversity & Inclusion" to "Diversity, Equity & Inclusion." We made this change following extensive discussion among our leadership team about what "equity" means, and only after we felt confident that our program now includes initiatives aimed at addressing equity in the workplace. In this report we share some of the work we're doing to ensure that people of all backgrounds have equitable access to professional opportunities at Consilio.

In this Annual Report we disclose our workforce diversity metrics, we share information about the year's successes, and we address some of the areas in which we fell short of our goals. Through the voices of our employees, we explore the many ways in which "DEI matters" to them. We also preview some of our DEI ambitions for 2024 and beyond.

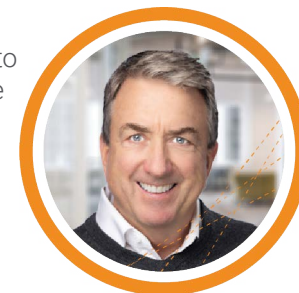
Consilio remains steadfast in its commitment that principles of diversity, equity, and inclusion matter—to our employees, our clients, and our communities. We pledge to pursue DEI strategies that are equitable to everyone and exclusive of no one. One of our objectives in 2024 is to create more opportunities for constructive dialogue with our clients and peers about how to maintain DEI efforts even in the face of opposition. We are grateful for your ongoing encouragement and unwavering support for our program.

Sincerely,

Andy Macdonald, CEO

Maureen O'Neill, Diversity, Equity & Inclusion Officer

Consilio remains steadfast in its commitment to advancing diversity, equity, and inclusion.



Andy Macdonald  
Chief Executive Officer



Maureen O'Neill  
Diversity Equity & Inclusion Officer

# Consilio's DEI Mission

Leadership of our DEI program continues to be guided by our mission statement. This statement has remained the same since we drafted it in 2018, when we intentionally created a concise, clear articulation of our objectives that was flexible enough to accommodate the growth and maturation of our program. However, this year we decided to add a single word to the first sentence of our mission statement: "abilities." This addition reflects a broader definition of diversity that includes persons with different physical and mental abilities, including persons who identify as neurodiverse.

*We are driven to attract and encourage a diversity of backgrounds, experiences, abilities, and ideas.*

*We strive to foster a global, inclusive culture where our employees feel valued, trusted and empowered to better serve our clients.*

*We cultivate and celebrate our employees' diverse strengths.*



# Leadership Matters

## DEI Leadership at Consilio

Consilio's internal Advisory Board spearheads our efforts to advance diversity, equity, and inclusion at the company. The Board includes our DEI Officer and several supporting positions; the executive leadership team, who serve as standing members of the Board; and a number of "at large" members from a variety of corporate functions and geographic locations. 2023 brought substantial growth and maturity to this leadership team.

First, we materially increased the number of employees who volunteered to serve as members of the Advisory Board. Some of this growth came organically, as awareness of the Board's work increased and more people stepped up to join the effort. We also saw significant growth through Consilio's acquisition of Lawyers On Demand (LOD), a pioneer in flexible legal talent, and SYKE, a premier legal technology consultancy. LOD and SYKE came to Consilio with active DEI committees around the world, and as we closed out 2023 we welcomed their DEI leaders onto our Advisory Board. With operations in the UK, Europe, the Middle East, Africa, Asia, and Australia, the integration of our LOD and SYKE teammates will vastly expand the geographic footprint of our DEI leadership and enhance the diversity of the cultures and perspectives represented. As we move forward into 2024, we embrace the challenge of adjusting our DEI programming to be inclusive of employees across the globe in different time zones, and reflective of the interests of culturally diverse populations.

We also took the significant step of establishing our first Senior Leadership position dedicated entirely to DEI program work: VP, DEI Partnerships and Communities. Through both internal and external partnerships, this role will engage key stakeholders in implementing strategies aligned with Consilio's DEI and business goals. To fill this new role, Consilio selected James Edwell, who has been actively involved in our DEI program since its inception. James shared some thoughts on the importance of this development:

“The creation of this position demonstrates Consilio's commitment to DEI as a corporate priority. Our executive leadership made the decision to add this new role at a time when many other companies are reducing DEI headcount and pulling back on their DEI programs. Consilio has long been the global leader in delivering world-class legal services and technology, but we are more than that—we are also the industry leader in serving our clients with diversity, equity and inclusion as a driving force in our efforts.

**James Edwell: VP, DEI Partnerships and Communities**



“At a time when some companies are scaling back their DEI programs, at Consilio we are doubling-down.

## Standing Advisory Board Members



**Maureen O'Neill**  
Diversity Equity & Inclusion Officer



**James Edwell**  
VP, DEI Partnerships and Communities



**Effie Sahihi**  
DEI Program Lead



**Kimbir Tate**  
DEI Program Manager



**Andy Macdonald**  
Chief Executive Officer



**Meredith Kildow**  
President



**Raj Chandrasekar**  
Chief Technology  
and Innovation Officer



**Brandyn Payne**  
Chief Employee Experience Officer



**Tim Yost**  
Chief Financial Officer



**Mike Flanagan**  
General Counsel



**John Hale**  
Chief Marketing Officer

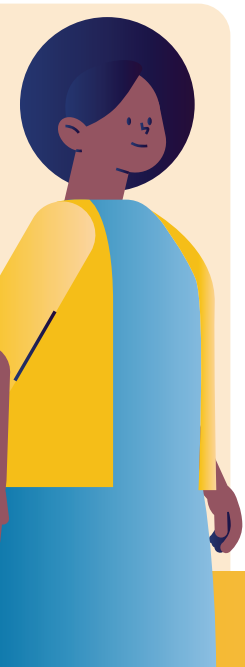
## At Large Advisory Board Members (2023-24)

- Carolyn Anger, GRO – Canada
- John Auterman, CS – US
- Douglas Badder, LOD – UK
- Chris Berry, LOD – AUS
- Danielle Brooks, GRO – US
- Linda Caldwell, HR – US
- Meggan Capps, GRO – US
- Christina Cidade, GRO – US
- Rocco Crincoli, LOD – US
- Bill Cleaver, GRO – US
- Mark Dodd, LOD – AUS
- Madelynn Dowdy, CS – US
- Theresa Ervin, Engineering – US
- Lisa Feldman, GRO – US
- Shamus Flower, CS – US
- Cecilia Fox, SSBU – US
- Jane Funk, GRO – US
- Canaan Himmelbaum, GRO – US
- Aisling Hubbard, LOD – UK
- Faith Ideh, GRO – US
- Omid Jahanbin, GRO – US
- Nick James, CS – US
- James Jansen, CS – US
- Shikha Joshi, HR – India
- Gosia Kania, LOD – UK
- Sofia Khan, LOD – AUS
- Matt Knouff, GRO – US
- Helena Kolenbet, LOD – AUS
- Elliot Kushner, LOD – UK
- Katie Lawrence, LOD – UK
- Lou Mancuso, ELS – US
- Kamaka Martin, CS – US
- Claire McMullin, SYKE – South Africa
- Matt Morocco, GRO – US
- James Morrey-Jones, CS – UK
- Johanny Olmedo, GRO – US
- Kat Parekh, LOD – UK
- Sharon Pidakala, LOD – Singapore
- Prithi Pillai, LOD – UK
- Adam Pollitt, CS – US
- Michael Pontrelli, GRO – US
- Aniruddha Prasanna, IT – India
- Bryony Reid, LOD – AUS
- Lamine Reese, ELS – US
- Sean Reisman, CS – US
- Steve Reutiman, HR – US
- Karishma Riddell, LOD – Hong Kong
- Paul Roberts, ELS – US
- Taffi Schurz-Jaso, GRO – US
- Lisa Sheehy, LOD – AUS
- Kelly Struck, GRO – US
- Matt Sumrack, HR – US
- Emma Willis, Legal – UK
- Rachel Wright, LOD – Singapore
- Caley Zingerle, LOD – AUS

## Client DEI Advisory Board

At Consilio, our Client DEI Advisory Board plays a key role in our DEI leadership. This Board brings together representatives from our corporate and law firm clients who draw on their backgrounds, experiences, and unique perspectives to provide us—and each other—with guidance on DEI efforts.

We gather with the Board both virtually and in-person, in roundtable settings designed to facilitate discussion about our organizations' DEI objectives. We share challenges, successes, and ideas, we seek feedback from each other, and we collaborate on potential partnerships. Some topics we addressed in 2023 included suggestions for employee affinity group programs, how to maintain DEI initiatives in the face of anti-DEI backlash, the potential impact of the US Supreme Court affirmative action decisions on private DEI programs, and how to handle employee concerns about traveling to locations that may present risk for them based on their diverse status. We look forward to continuing these constructive conversations in 2024.



# Diverse Talent Matters

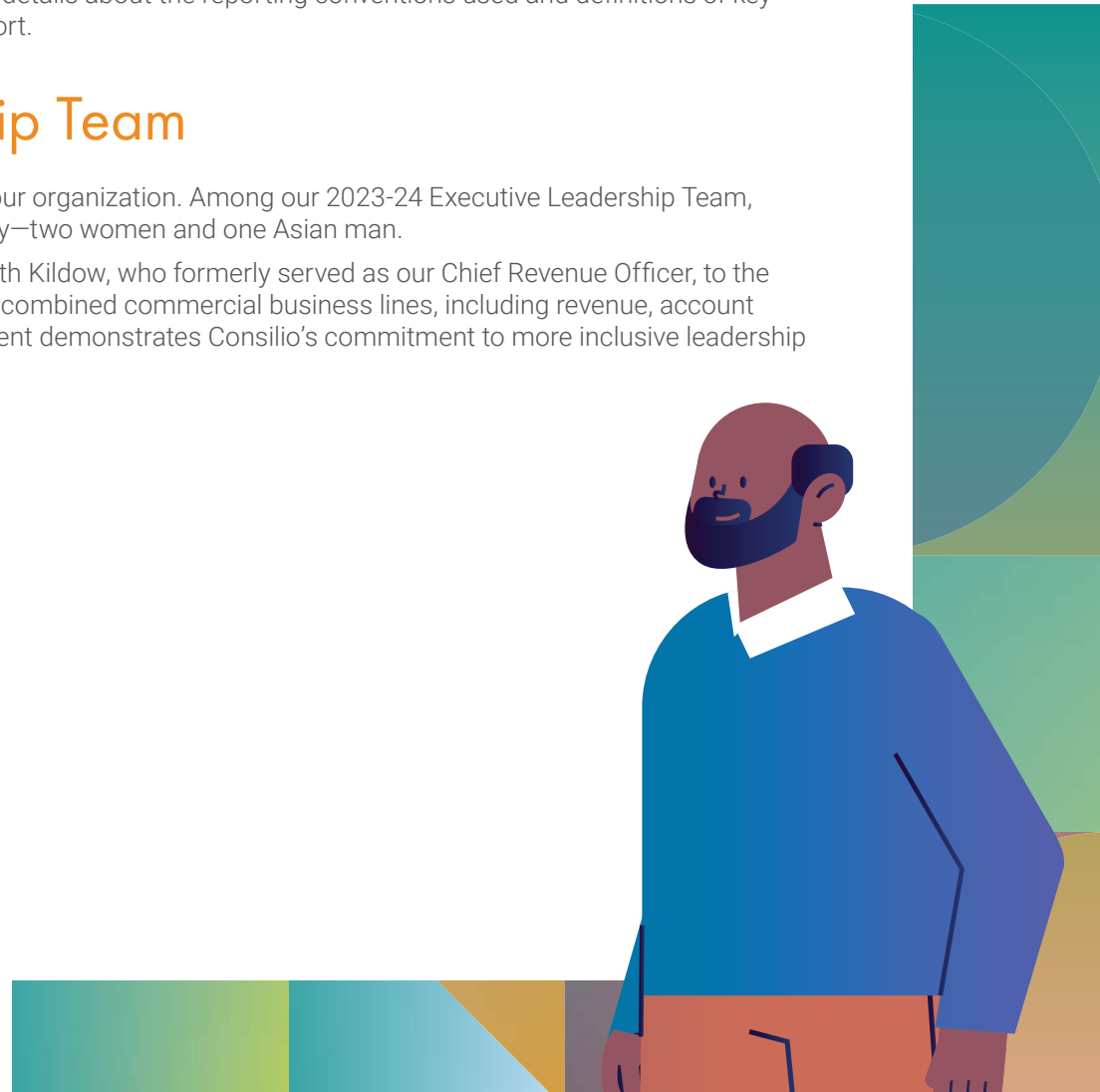
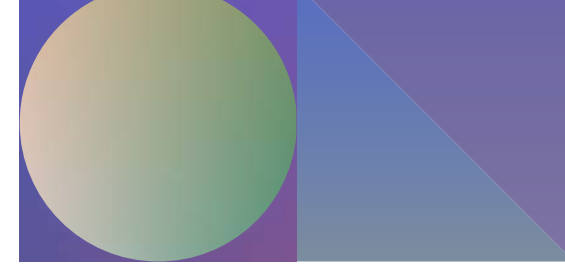
## Diversity at Consilio in 2023: Our Metrics

As part of Consilio's continuing commitment to transparency with our DEI efforts, in this section of the Report we present an analysis of various demographics of our global workforce. For details about the reporting conventions used and definitions of key terms, please see the Appendix included at the end of the Report.

## Consilio's Executive Leadership Team

Diversity at Consilio must be reflected in the highest levels of our organization. Among our 2023-24 Executive Leadership Team, three of the seven-person team identify as diverse in some way—two women and one Asian man.

We were excited to announce in 2023 the promotion of Meredith Kildow, who formerly served as our Chief Revenue Officer, to the role of President. In her new role, Meredith oversees Consilio's combined commercial business lines, including revenue, account management, and operational delivery. Her elevation to President demonstrates Consilio's commitment to more inclusive leadership for the company and its clients.

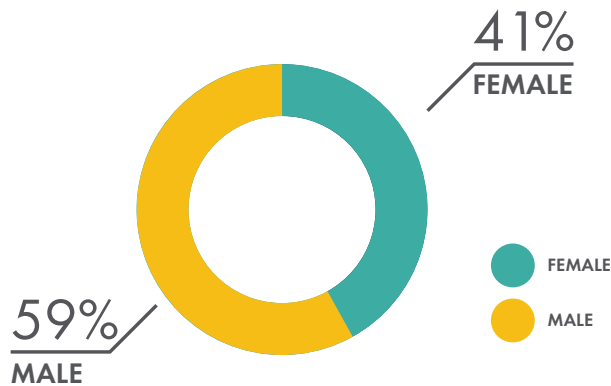




# Consilio's Corporate Employee Workforce

## Gender at Consilio

At the end of 2023, women represented 41% of our global employee base, while men represented 59%.<sup>1</sup> For the second year in a row, female representation across the company increased by two percent.

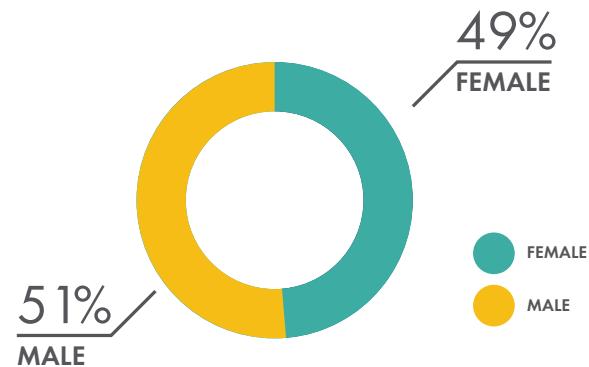


Female representation across the company increased by two percent.

One factor contributing to the increase in female representation was our hiring—women comprised almost half of new hires at Consilio in 2023.

## New Hires at Consilio

Women comprised 49% of new hires at Consilio.



One of the ways we promote our extraordinary female talent at Consilio is through our blog series "Women in Technology." We invite you to read their success stories and learn from their insights on our [website](#).

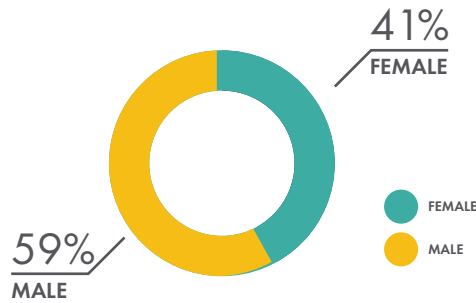
<sup>1</sup>According to the latest data from the World Bank, women account for 39.5% of the global workforce, so Consilio's gender representation exceeds the labor market benchmark.

Voluntary attrition of our female employees in 2023 remained steady year-over-year at 42% of departures from the company. We still believe that number should be lower, so we are continuing our efforts to improve the employee experience of women at Consilio and increase their retention.

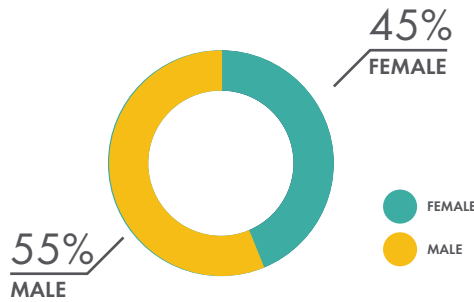
With respect to female leadership at Consilio, we increased the number of women at the Manager level to 41%, a boost of two percent over 2022. This result was achieved through both hiring and promotion decisions—women comprised 45% of new hires into Manager level jobs, and 44% of promotions into this level. We will continue to focus on identifying female talent at this early stage of management, which will create more opportunities in the future to promote women up through the leadership ranks and into senior leader positions.

The number of women in Manager roles increased by two percent.

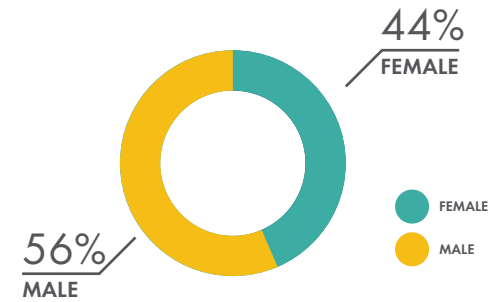
### Managers



### Manager Hires



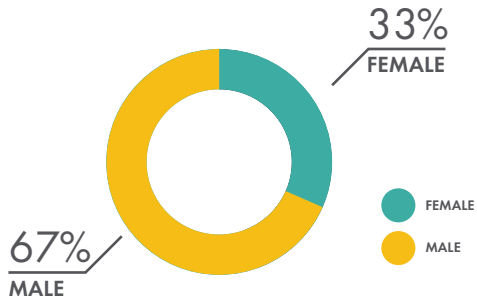
### Manager Promotions



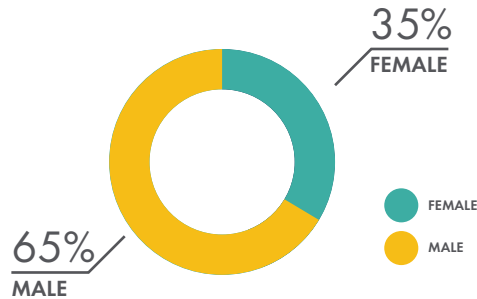
Female representation at the Director level remained the same at 33%. However, we are already seeing the impact of the increased pipeline of women in manager roles, as 55% of promotions to Director this year went to women. Women represented 35% of new hires into Director roles, so we also had good success sourcing qualified female talent for outside hires into these positions. We saw more female attrition from Director positions than we'd like, with women representing 40% of voluntary departures from those jobs. So in addition to our pipeline-building efforts, we will continue to devote attention on reducing attrition.

Women represented 55% of promotions to Director level positions.

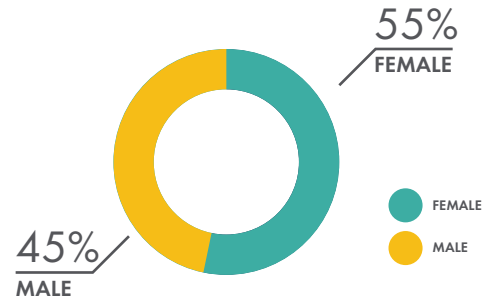
### Directors



### Director Hires



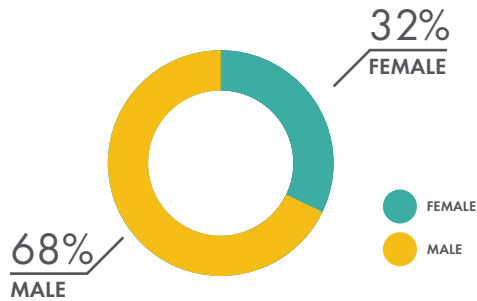
### Director Promotions



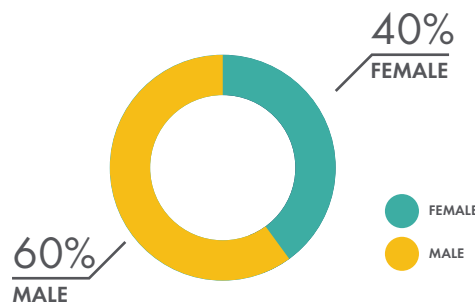
At the most senior levels of leadership, in 2023 we raised female representation to 32%, an increase of four percent. The number of women in Senior Leadership is an area of focus for us, and we are gratified to report some success. The results are attributable to new hires, where 40% (2 out of 5) were women, and also to promotions, where 60% (3 out of 5) were awarded to women. In 2024 and beyond we intend to maintain this focus and further increase the number of senior women leading our business.

The representation of women in Senior Leadership increased by four percent.

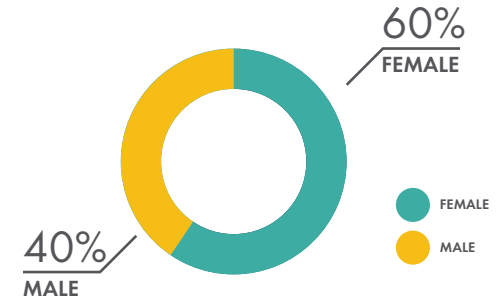
### Senior Leadership



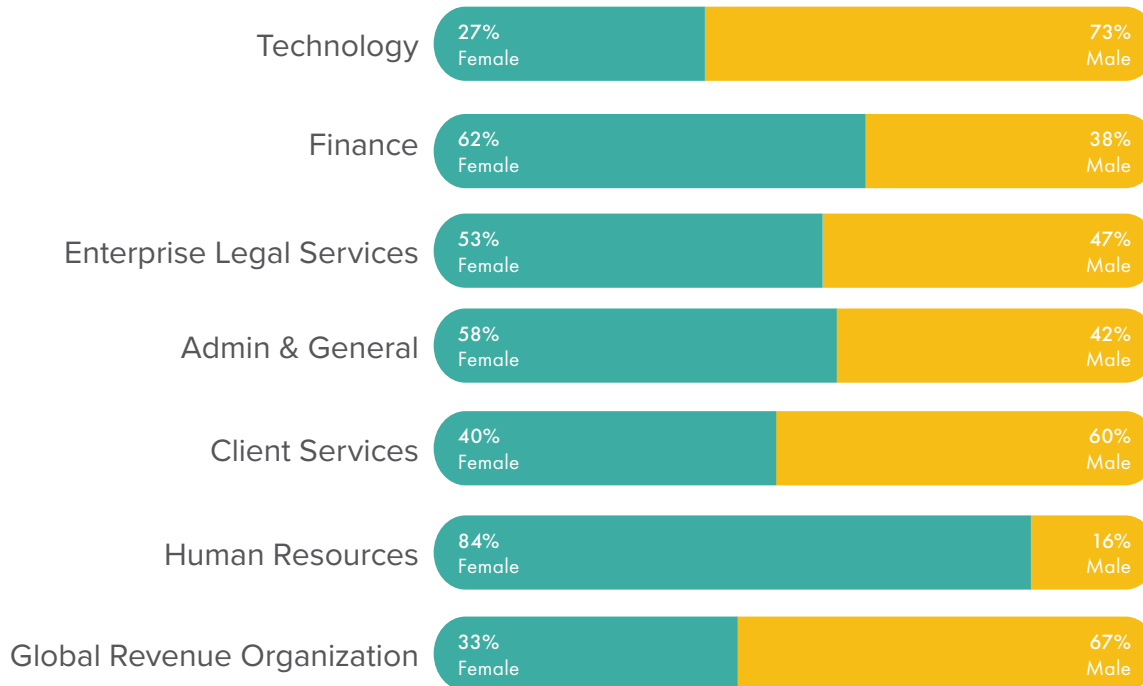
### Senior Leadership Hires



### Senior Leadership Promotions



### Gender by Function



Examining how women in our workforce are distributed among the different business functions, the breakdown in 2023 looked similar to past years. However, for the second consecutive year we saw increases in the representation of women in Technology and the Global Revenue Organization (GRO). Two years ago we turned our attention to increasing the number of women in these functions, and we are pleased to see positive results.

We increased the representation of women in Technology roles by two percent.

We saw a two percent increase in the representation of women in the Technology function. Women now comprise 27% of that workforce, which brings us in line with relevant global labor market benchmarks.<sup>2</sup> However, we will continue to look for ways to attract even more female technology talent to our organization and provide opportunities for women with STEM backgrounds to build careers in the legal technology space. One way we're doing that is identifying early-career female talent for technical roles in our India operations. In our Technical function in India, women comprise 31% of the "Professional" salary level roles, creating opportunities in the future to advance these accomplished women into management positions.

Female representation in business development roles increased by five percent.

We also saw growth of two percent in the number of women in the Global Revenue Organization (GRO) this year, bringing their representation to 33%.<sup>3</sup> Looking more specifically at women in business development roles, which is a focus area for us, we increased their representation by five percent, up to 26%. Much of that increase is attributable to our Consilio Sales Associate Program (CSAP), a new early-career sales pipeline initiative that we highlight later in the Report. Of the Sales Associates hired in the inaugural 2023 cohort, 14 out of 24 (58%) were women. With two more CSAP cohorts planned for 2024, we will continue to use this pipeline program as way to develop talented women in sales roles.

Finally, we increased the representation of women in our Client Services function by three percent, up to 40%. Given that this is the largest of our business functions with more than 1,300 employees, this represents a substantial growth in the female headcount working in the organization.

<sup>2</sup>According to 2023 data from the US Bureau of Labor Statistics, women hold 26.9% of jobs in the category of "Computer and Mathematical Occupations." A 2022 report issued by AnitaB.org states that 27.6% of technology jobs are held by women. <https://anitab.org/research-and-impact/top-companies/2022-results/>. The World Bank estimates that women hold 28% of all jobs globally in computer and mathematical occupations.

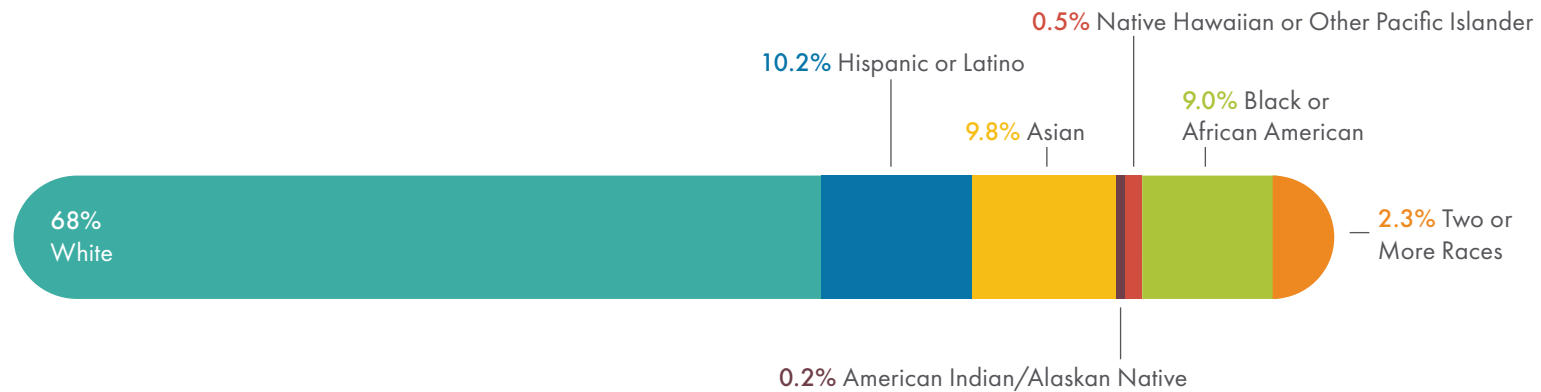
<sup>3</sup>In the US Bureau of Labor Statistics 2023 data, "Sales and Related Occupations" are 48.7% women, and "Sales Representatives of Services" are 31.6% women.



## Race & Ethnicity at Consilio

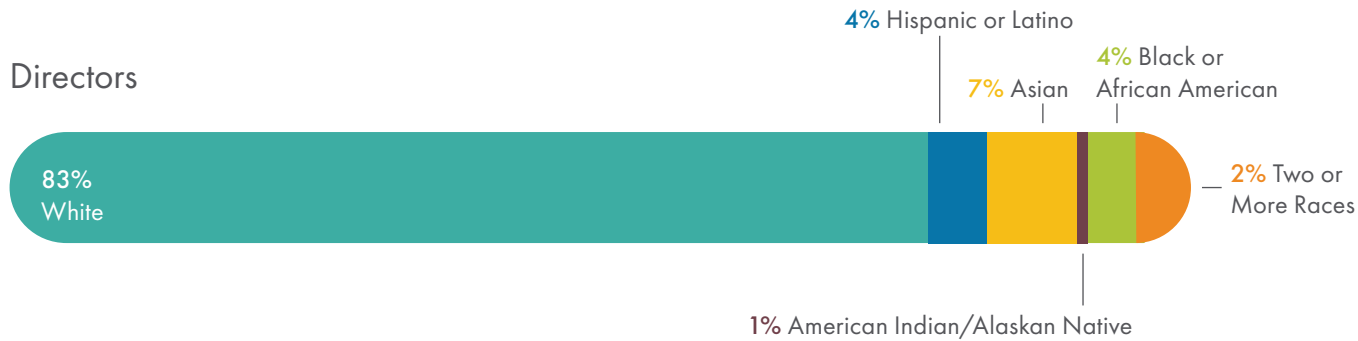
Among Consilio's US workforce, 68% of our employees who provided race/ethnicity information identify as white, and 32% identify as people of color. According to 2023 data from the Bureau of Labor Statistics, 76.5% of the US workforce identifies as white, so the Consilio employee base is, on average, more diverse than the overall labor market. However, even though we are more diverse than the benchmark, the representation of people of color at Consilio fell by one percent as compared to 2022. We will monitor this metric closely throughout 2024 and investigate any trends that emerge.

Examining the breakdown of the specific racial/ethnic categories, at Consilio we have a higher-than-average percentage of employees identifying as Asian, Native Hawaiian, or Pacific Islander: 10.3% at Consilio vs. 6.9% in the US. Conversely, our employees identify as Black or African American at a slightly lower percentage than average: 9.0% at Consilio vs. 12.8% in the US. We see similar metrics for Hispanic or Latino employees: 10.2% of Consilio employees vs. 18.8% across the US.



As we've seen in past years, the representation of employees of color decreases with higher levels of seniority. As compared to 2022, in 2023 the representation of non-white employees at the various levels of leadership remained mostly unchanged. These metrics are disappointing, as we had identified this as a focus area.

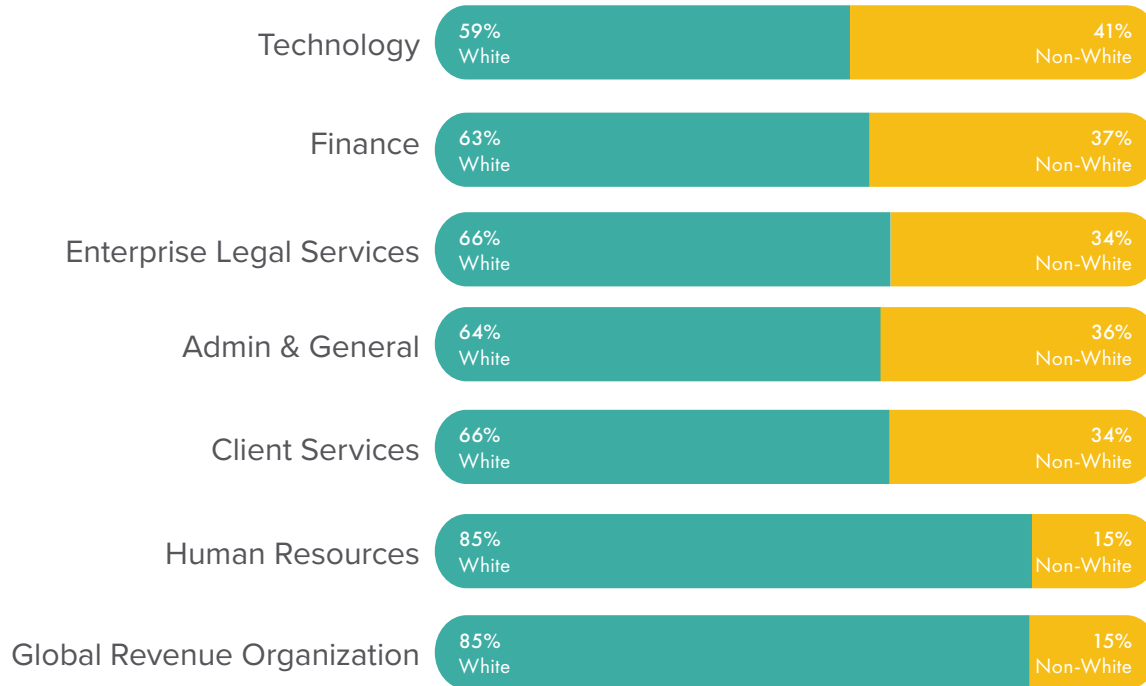
Moving into 2024, our business leaders will re-examine our strategies for establishing a more racially and ethnically diverse group of leaders at Consilio. The current pipeline for entry-level management shows potential. 35% of the senior "Professional" salary level jobs at Consilio are held by persons of color; these roles typically are the feeder positions for promotions into Manager and Supervisor. Developing those employees and readying them for promotion will be one of the strategies we employ moving forward.



In 2024 we will heighten our focus on improving our racial and ethnic diversity in leadership roles.

Looking at the racial and ethnic diversity across business functions, we see that employees who identify as non-white are distributed fairly evenly across most of the business. However, we realize we have an opportunity to improve our diversity in the GRO, where 85% of employees self-identify as white.<sup>4</sup> We turned our focus to this in 2023, and we will continue to devote attention in 2024 and beyond.

## Race & Ethnicity by Function

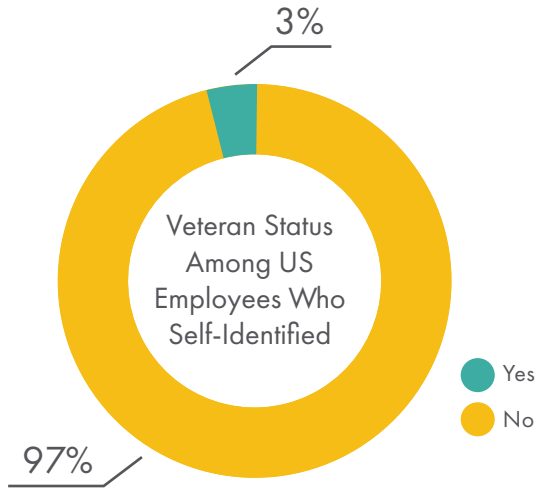
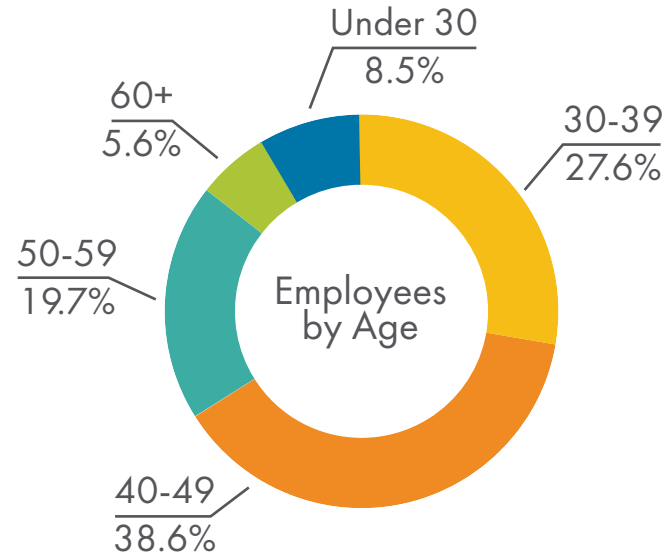


<sup>4</sup>Although in the Human Resources organization we also see 85% of employees in the US self-identifying as white, that function is quite small relative to others in the business, with fewer than 30 employees in the US. More than a third of our HR employees are located outside the US.



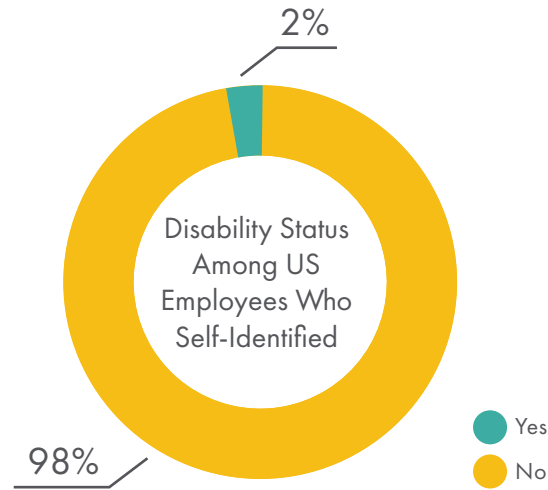
# Other Characteristics of Consilio Employees

In 2023 the age distribution of our US workforce shifted slightly older. The number of employees under 40—our “Millennial” and “GenZ” employees—decreased by two percent, while the number of employees 50 and over increased by the same amount. This shift is consistent with an overall trend in the US labor market towards increased participation of older workers, who are choosing to remain in the workforce longer than in the past.



At Consilio in the US, three percent of our self-identifying employees are veterans, which is unchanged from the prior year. However, only 31% of US employees have elected to disclose their veteran status, which is a metric we'd like to improve in the future.

Among those who self-identified their disability status, two percent of Consilio’s US employees indicated that they have a disability. This is an increase of one percent year-over-year. However, 67% of our employees have not self-identified their disability status, so continuing to encourage more disclosure remains a goal.





# Consilio's Document Review & "Lawyers On Demand" Employees

## Demographics of Consilio's Document Reviewers

Through its Consilio Services subsidiary company, Consilio employs more than 4,500 people in the US who deliver document review services. Most of these employees are lawyers engaged in document review, while a small number work as project managers, data analysts, or as staffing support.

To better understand the demographics of this workforce, over the last few years we have made various efforts to encourage these employees to self-identify their diversity characteristics. We now have virtually complete gender identity information. However, while we've seen increases in the number of employees who provided their race/ethnicity information, we are still missing that data for more than 80% of this workforce. We will continue to work on the collection of more complete data, so that the race/ethnicity metrics we report are more fully representative of that group of employees.

The population of attorneys working on document review projects at Consilio is significantly more diverse than the overall US lawyer population.

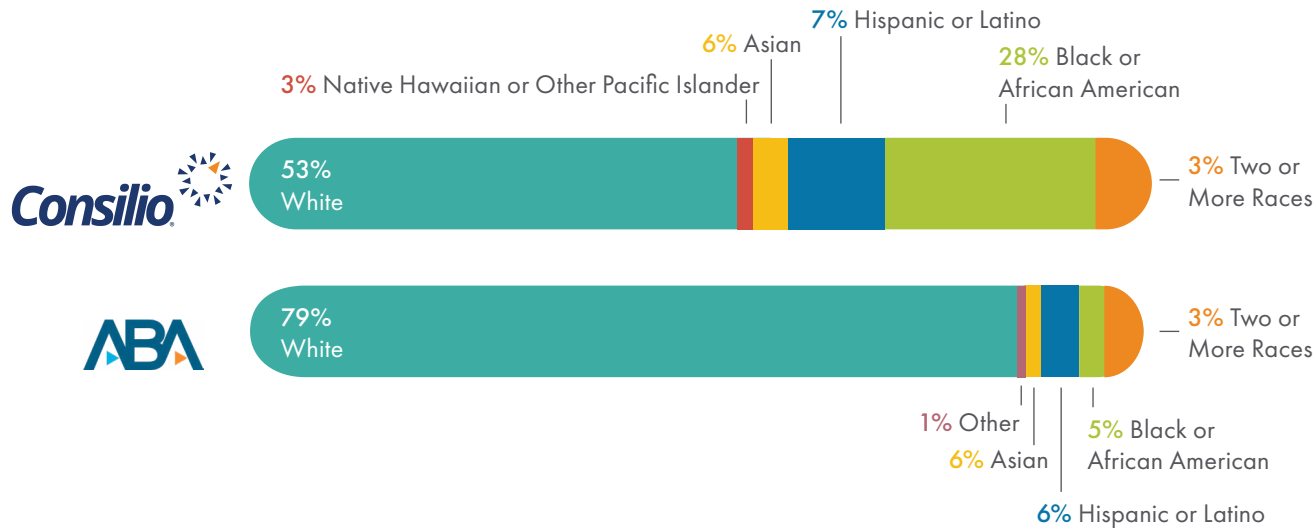
## Document Reviewers: Gender

Among the lawyers engaged in document review at Consilio, more than half—54%—are women. This percentage is significantly higher than among the overall lawyer population in the US. According to the ABA's 2023 National Lawyer Population Survey, 39% of lawyers currently practicing in the US are women. A small number of document review attorneys elected to self-identify their gender identity as "non-binary" and "other," which are relatively new options we added in 2022.



## Document Reviewers: Race/Ethnicity

Among the document review attorneys who volunteered their race/ethnicity, 47% identify as persons of color, and 53% identify as white. Even as the overall attorney population in the US has gotten more diverse in recent years, our document review lawyer population nevertheless remains more diverse than the benchmark. Based on the ABA's 2023 population survey, 79% of lawyers in the US are white.



## Document Reviewers: Military Spouse Status

Back in 2020 when the COVID-19 pandemic hit, Consilio rolled out its Secure Virtual Review platform, which enables document reviewers to work remotely from any location. Not long thereafter, we realized that this remote work option would enable us to offer employment to lawyers who are spouses of members of the military stationed in locations where Consilio did not maintain a physical document review facility. We launched an effort to track military spouse status and find ways to reach out to more of these lawyers. On a quarterly basis we survey the document review workforce to identify military spouses, and we also ask those reviewers who have a network of military spouses to please share referrals with us. In our latest survey, five percent of our document reviewers reported that their spouse was on active military duty or a veteran. Going forward we hope to continue to grow the number of military spouses and veterans working in Consilio Services.

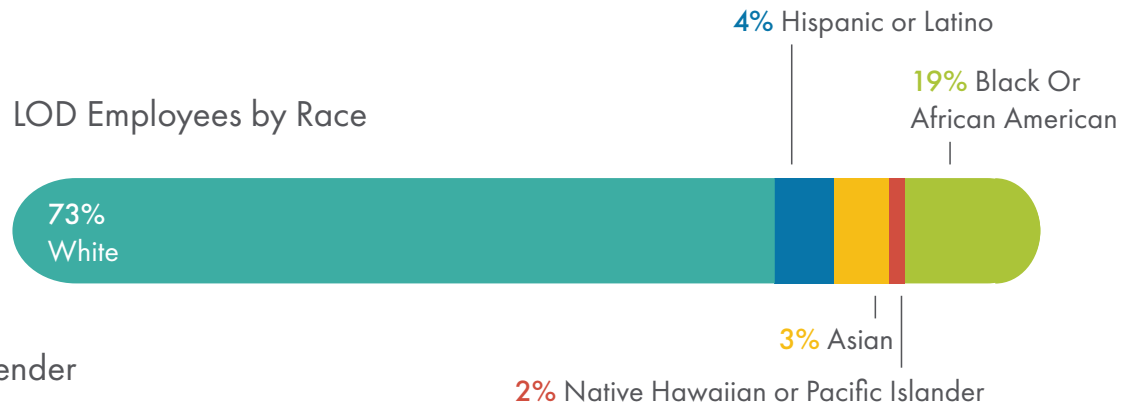
Five percent of our document review attorneys identify as a military spouse.

## Demographics of Consilio’s “Lawyers On Demand” Workforce

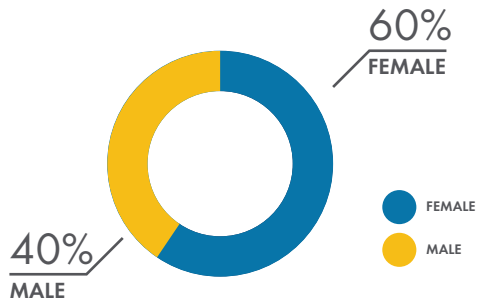
Consilio employs several hundred attorneys in the segment of its business now called “Lawyers On Demand” or LOD. The LOD attorneys, who typically have significant experience in a specialty area of practice, are placed on assignment with Consilio’s clients to augment their permanent attorney staffing. Some of these assignments are discrete project-based assignments of limited duration, while others are longer-term placements that embed the LOD lawyer in the clients’ legal team. For the LOD attorneys, this model of practicing law enables them to work on challenging, professionally fulfilling assignments, but with a level of flexibility that traditional legal jobs rarely offer.

At the end of 2023, 60% of the Lawyers On Demand attorneys identified as female, 40% as male. Of those who self-identified their race/ethnicity, 27% identified as persons of color.

LOD Employees by Race



LOD Employees by Gender



## Diversity at Consilio in 2023: Our Talent Acquisition and Development Programs Attracting Talent

Consilio is determined to find, recruit, and hire a diversity of talent. To achieve that objective, we have established several different emerging talent programs designed to bring early career professionals to Consilio. In 2023, we were successful in filling these programs with diverse groups of employees.

**Project Management Apprenticeship Program:** This annual program enables Consilio to build a pipeline of qualified Project Managers, who play a critical role in our service delivery operations. The participants engage in classroom instruction, applied learning, and hands-on experience within project teams. At the conclusion of the program, successful apprentices are offered a full-time position within the Project Management team. Among our 2023 PM Apprenticeship class, 58% were women, and 33% identified as persons of color.

**Consilio Summer Internship Program:** This internship program exposes law students and undergraduates to potential careers in legal services and enables them to build practical job experience while learning from experts. The paid interns participate in a highly interactive learning environment, work on collaborative projects with their colleagues, receive individual mentoring from Consilio's leaders, and gain real-world experience in different segments of our business. In 2023 women represented 47% of our summer intern class, and persons of color represented 40% of the interns. Two of our summer interns have returned to Consilio after graduation to join the Sales Associate Program and begin a sales career with us, including one woman, so we're already seeing some success in using the internship program to develop our talent pipeline.



**Consilio Sales Associate Program (CSAP):** Maintaining a team of skilled sales professionals is key to our success. And as the public face of Consilio to our clients and the market, it's important that the diversity of our sales team reflects the diversity of those communities. However, the dearth of qualified sales talent in our industry—and the lack of diverse salespersons—has been a challenge for us. To solve this problem, Consilio created CSAP as a way of building our own pipeline of skilled business developers, and ensuring that more women and people of color are given opportunities to join this exciting, rewarding profession. CSAP hires and trains early-career sales talent from around the world to bring a diversity of background and experience to the Consilio sales organization and prepare the next generation of sales leaders.



The first cohort of 24 Sales Associates joined us in summer of 2023. Among that group, 14 (58%) were women, and five (19%) identified as persons of color. The program has been so successful that we are already planning two more cohorts for spring and fall of 2024. We thought it would be interesting to hear some perspectives from Sales Associates in the inaugural program.

“I came to the CSAP program with no experience in the legal industry, but with a strong background in sales and communications. I learned about the program on LinkedIn, and I'm so glad I did—my experience with Consilio has been nothing short of amazing, and I brag about my job every day! I love that I am a part of a program that is new to Consilio and new to the industry. Everyone here has been so nice and helpful, and the Associates in my class get along well and have become genuine friends. I see that's it possible to succeed here and still have a great work-life balance. I can honestly say I feel a part of the Consilio family, and everyone wants the CSAP program to do great. I would love to see more women and people of color in this space, and I am encouraged that CSAP is making strides in that direction. I look forward to making a career at Consilio!

**Alayna Mitchell: Sales Associate**



“While I attended law school, I gained experience selling legal products and solutions for Thomson Reuters and Themis Bar Review. Because I was interested in combining my skills as an attorney and previous experience in legal sales, I was very particular in finding a position that would allow me to immerse myself in both. Once I saw Consilio was hiring for the CSAP program, I applied and never looked back. My experience at Consilio has been fantastic. I not only appreciate working with the best and brightest in the legal industry, but I am constantly learning new things about eDiscovery, document review, and legal talent solutions. I genuinely love helping clients find solutions to their complex legal issues, and my role at Consilio allows me to do so. Unfortunately, women in the legal industry still experience gender bias, so speaking up against inequality and ensuring equal representation is vital in overcoming this. It's important to me that Consilio maintains a strong DEI program, and that one of its goals with CSAP is to create more opportunities in legal sales for women.

**Farrah Saracevic: Sales Associate**



In addition to our emerging talent programs, we also work to identify diverse candidates for careers at Consilio through partnerships with various organizations and institutions. For example, Consilio is actively working to create long-term partnerships with various HBCUs, with the goal of exposing their graduates to the wide variety of career paths in legal services and technology. These partnerships provide opportunities to attend career fairs, conferences, and other events sponsored by the colleges and universities, allowing us to introduce Consilio to candidates for employment. We also sponsor and partner with the professional organization Women in eDiscovery, which enables us to identify, recruit, and hire talented women in our industry.

## Developing Leaders

This year we continued to devote resources to developing our leaders and preparing the next generation of leaders who will carry on our success. In this section of the Report we explore some of the ways we approached that in 2023.

### Learning DEI Leadership

We believe that leaders who appreciate the value of diversity and understand how to build an inclusive culture will create the conditions under which all employees can thrive. Two of our programs aimed at fostering inclusive behaviors and developing other DEI skills among our leader population are highlighted here.

#### Boost

Boost is a manager development program at Consilio that incorporates DEI as a core topic area. Courses include Inclusive Leadership, Developing Your Emotional Intelligence, Cross-Cultural Communication, and Leading with Empathy. In 2023, more than 100 managers participated in Boost and honed their DEI skill set.

#### Consilio Leader Labs

Consilio Leader Labs is a development program available to all our leaders, which consists of live learning sessions facilitated by external experts. We attracted more than 600 participants across the series in 2023, with topics covering Coaching and Feedback, Emotional Intelligence, and a DEI Workshop for leaders.

The DEI Workshop led by [Meagan Johnson](#) was particularly impactful for our leaders. Meagan explored the different generations that work at Consilio and how their “generational signposts” shape expectations in the workplace. Leaders learned that recognizing and embracing generational diversity not only makes us empathetic to others but also enables us to understand the varied expectations of the people who surround us. One of the ways we measure the success of our development programs is by Net Promotor Score—Meagan’s Workshop received an off-the-charts NPS of +97!



## Preparing the Leaders of Consilio's Future

Consilio Leadership Academy (CLA) is one of the most powerful programs at Consilio for establishing our next generation of senior leaders. CLA is a 12-month leadership development program that brings together a diverse cohort of high-potential leaders to prepare them for future executive positions at Consilio. The program is designed to empower and develop the participants through a combination of executive exposure, networking, mentorship, learning and coaching from external experts, and personal and professional growth. We've quickly achieved success in meeting our objective with CLA—among the first two graduating classes, 40% have already been promoted or taken on a “stretch” professional development assignment.

Consistent with our goal of improving the diversity of our senior leadership ranks, we aim to select CLA classes in which at least 50% of the participants are diverse with respect to gender or race/ethnicity. As we shared in last year's report, we met that goal for the inaugural class in 2022, and we achieved it again this year. In the CLA 2023 class, 54% of the participants were diverse (42% were women, and 17% identified as racially/ethnically diverse). Moving forward, we are committed to ensuring that CLA prepares our diverse talent for elevation to senior leadership positions. In 2024 we look forward to welcoming new colleagues from LOD and SYKE into the program.

Consilio is extremely proud of the innovative CLA program, which we believe has been a resounding success. In this report we wanted to bring forward the voices of some of the CLA graduates to share, in their words, why the program is so important.

“The Consilio Leadership Academy is nothing short of a diversity and inclusion superhero in the corporate world. Picture this: Director and above level leaders coming together like Avengers, but instead of battling villains, they're tackling situational management and mastering coping strategies. It's a spectacle of collaboration and learning, with leaders discovering the secret art of building communication bridges across departments. The academy unveils the mysterious workstreams of various departments, making leaders exclaim, “I didn't know we had a team of ninjas working on that!” Amidst all the serious business, the academy becomes a hub of camaraderie, creating a community where friendships blossom faster than you can say “strategic synergy.” Who knew diverse and inclusive leadership development could be this much fun?

**Theresa Ervin: Sr. Director, Enterprise Architecture Engineering (CLA 2023)**



“Consilio's Leadership Academy stands as the pinnacle of long-term development programs in my career, demonstrating our unwavering commitment (and attention to detail) in cultivating future leaders. For me, the program grounds and builds around the premise that a blend of varied thoughts, experiences, and efforts is the starting point to great things. It actively fosters an inclusive culture where diverse cultural, ethnic, and gender perspectives are not just welcomed, but are integral to shaping a world-class, high-performance organization. It also refines how you effectively interface with other high-powered professionals to get things DONE. If my experience was typical, I have no doubt that by harnessing this rich tapestry of diversity, the academy will ensure that we are advancing our clients' objectives and driving innovation and excellence in an ever-changing global landscape.

**Omid Jahanbin: VP, Global Marketing & User Experience (CLA 2023)**



“The enriching CLA experience gave me a great opportunity to build relationships with a diverse group of leaders from varied geographies, roles, and backgrounds. I found there was a huge diversity of thought and talent due to those differences, which was the key ingredient that contributed to our growth. I felt I could be my true self and share vulnerabilities about my journey and experiences as a leader. I am truly thankful for the experience, and I see the tangible difference it has made not only in how I lead, but in how I demonstrate my presence as a leader. It has also opened doors to new opportunities, such as leading a workstream for the integration of our newly acquired companies LOD and SYKE, and contributing to key global projects and initiatives within the Employee Experience organization.

**Leona Gerald-Okoli: Director, Human Resources (CLA 2022)**



“The Consilio Leadership Academy has been a highlight of my career. Consilio’s commitment to building a diverse leadership pipeline has been a driving force behind my personal growth within the organization, and I can attribute my development to the CLA program. Since graduating from the CLA, I have been selected to lead the groundbreaking Consilio Sales Associate program. The opportunity to contribute to the company’s mission of building a vibrant, diverse sales team is both exciting and fulfilling. Having a direct hand in shaping the future of our sales organization aligns perfectly with my values and aspirations. I am ready to succeed in this new role and eager to contribute to the continued success of Consilio’s commitment to diversity and inclusion.

**Johanny Olmedo: Senior Director, Consilio Sales Associate Program (CLA 2022)**





## Turning Mentorship into Leadership

Consilio knows that mentorship is a powerful professional and leadership development tool that benefits our employees and our company. Unfortunately, women and other historically underrepresented groups sometimes struggle to establish mentor relationships organically. Recognizing this, in 2023 we began efforts to provide structured mentorship opportunities to a few different groups of employees.

In January, Consilio's *WE-Together* women's affinity group launched their mentoring program. The program is designed to pair mentees with a senior advisor who can help them overcome career challenges, critically examine their perspectives, and assist them in making important decisions. Mentors have the opportunity to "pay it forward" as leaders by coaching less experienced members of the organization and helping them develop their full potential. The Program provides mentors and mentees with training, a defined structure for carrying out the mentorship, and extensive resources and materials to assist them.

In March, *Proud@Consilio*, our LGBTQIA+ affinity group, also rolled out a peer-to-peer mentoring program for its membership aimed at connecting more seasoned employees with earlier-in-career employees. Mentee-mentor pairs in this program designed personalized plans that addressed a variety of issues from skill building and career navigation to networking within Consilio.

From the perspective of cultural and geographic inclusion, we also wanted to ensure that team members based in EMEA locations had access to mentorship opportunities with others similarly situated. In October, we started the first cohort of the EMEA mentorship initiative, which was modeled after the *WE-Together* program. Any employee in the EMEA region could apply to become a mentee, and mentors were solicited from around the world to create the best match for each mentee's objectives.

Across these different mentorship programs in 2023, almost 100 employees participated as a mentee or mentor. We asked several of the participants to share their thoughts on why the experience was so powerful:

“

I had the pleasure of working with my exceptional mentee as she became more confident in her leadership abilities over the course of the mentor/mentee program. We both experienced personal growth and strengthened our professional skillsets as we brainstormed various communication and management strategies together. After several months of sharing challenges and wins together, I'm confident that my mentee and I will maintain our strong connection, and will continue to support our mutual career growth and development!

**Cynthia Williams: Director, ELS Business Development – Mentor**



“

The Consilio WE-Together mentorship program provided an amazing opportunity to engage with other women in our company and encourage them as they look for guidance in the industry. As a mentor, I was able to learn so much about the mindset of women in our company and the challenges of roles that are different than my own. I gained a new perspective on how to approach problems while leaning in and investing time into someone else's success. The most rewarding part of the process is that success in the program means forming a new relationship that will continue on and provide value to both the mentor and mentee long after the program officially ends.

**Casey Collins: Senior Director, Strategic Solutions – Mentor**



“ I joined the WE-Together mentorship program to seek guidance and advice as I navigate my career with Consilio. The program has helped me find ways to partner with other individuals and groups within Consilio to better serve our clients, and gain confidence. My mentor is a trusted resource and advocate who is helping me build skills as a client manager and account lead. This program helped me set clear and attainable goals in my current role. At the conclusion of the program, I found a strong network of women within Consilio who can provide me with advice and support in my career. After participating in the program and benefitting from this network, I would love the opportunity to serve as a mentor for other women in the organization.

**Ellen Taylor: Senior Manager, Talent Solutions**

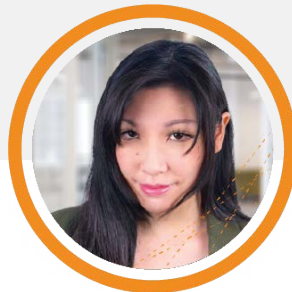
– Mentee



“ I'm constantly seeking opportunities to develop my professional career and joining the Proud@Consilio mentorship program was the natural solution. My mentor's passion, patience, and advocacy for my development has been invaluable. I'm grateful for the opportunities he's encouraged me to explore within Proud@Consilio and the Diversity & Inclusion program. His positive witticisms on navigating the professional space have been instrumental in my growth at Consilio.

**Knottlynn Tran: Project Manager**

– Mentee



“ I joined the EMEAA mentorship program as I wanted to make myself more visible within the wider organisation and was finding this challenging as I work remotely. My mentor has supported me with introductions to key individuals and has been a valuable sounding board for my ideas on how I could provide support and guidance to the company around data protection and privacy. Feedback from my mentor has helped to build my confidence and I have subsequently joined DEI initiatives to enhance my teamwork and leadership skills. I now serve as a co-chair of our Sustainability affinity group and a member of WE-Together, the women's affinity group.

**Emma Willis: Data Protection Director**

– Mentee



“ As the Chair of Proud@Consilio, I had the pleasure of meeting Knottlynn, an ally who sought a mentor through our program. When we asked for volunteers to help with a quarterly Proud meeting, Knottlynn came forward and offered to help. This initiative not only allowed her to showcase her skills, but also make a difference, while providing her with an opportunity to work with senior management. After we met and laid out a plan, Knottlynn did a fantastic job finding a speaker, securing funding and running the meeting. It was a big success! I encourage everyone to participate, volunteer and make a meaningful impact on a mentee's career.

**Paul Roberts: Principal, Advisory – Mentor**



In 2024 we plan to build on the success of these programs by forming new cohorts of mentee-mentor pairs in the existing programs, and rolling out a new mentorship program for employees in our India locations.

# INCLUSION MATTERS

For Consilio to leverage all the benefits that flow from a diverse workforce, we need to maintain a culture that promotes inclusion. To feel “included,” employees must know that their unique talents, viewpoints, and experiences are valued and respected. They need safe spaces to express themselves, explore ideas, and encourage innovation. And we must provide support structures to enable their professional and personal growth.

## Inclusion Through Employee Affinity Groups

One of the most effective ways of fostering a sense of inclusion for our employees is through our network of Employee Affinity Groups (EAGs). Our EAGs bring employees together from across business units and geographic locations around shared interests. These groups provide a supportive environment for employees to discuss important issues, learn from each other and from invited guests, develop valuable professional skills, and create a network of peers and friends. All of our EAGs are open to any employee, whether they identify as a member of the group’s demographic or as an ally. Our only requirement for membership is that employees come with an open mind, a willingness to learn, and respect for each other.

In 2023 we continued our efforts to provide more structure and support for our EAGs. We held monthly meetings with the EAG leaders to share ideas and collaborate on joint messages and meetings. We also started a routine of quarterly strategy sessions with the new VP, DEI Partnerships and Communities, in which we assist the EAGs with building strategic plans for meetings and events, community engagement, budgeting, and membership engagement. We continued to build out back-office functions to enable better communication with EAG members, and updated intranet sites for each group.

We found various ways to promote our EAGs in 2023, hosting several virtual events that highlighted the groups’ missions and accomplishments and enabled interested employees to learn about the groups. We also had the opportunity to feature our EAGs during *ConsilioWorld*, our company-wide employee learning and networking event. This exposure resulted in 125 new members across our EAGs. We also held meetings to introduce our EAGs to employees joining us through the acquisition of LOD and SYKE, which resulted in a significant increase in global membership.

Below are some highlights of the programming delivered by our EAGs this year.

Our EAGs at Consilio  
welcome any employee  
who wants to join.



In 2023, *B.R.A.G.*—Consilio’s Black Responsiveness Affinity Group—continued to hold quarterly meetings. They began with a February meeting celebrating Black History Month, which addressed the question: *Is Black America in an identity crisis?* For Juneteenth, the group discussed *The George Floyd Effect* and where America finds itself three years after his murder, examining whether America has lived up to the promises made in 2020. They continued the year with a series of meetings entitled *The Case for Reparations*, exploring the topic of reparations in America and the UK. Finally, and most significantly, *B.R.A.G.* launched its Fourth Annual Holiday Food Drive for the South Jersey Food Bank, raising more than \$4,200 and providing 12,000+ meals to those in need during the holiday season.



This year *WE-Together* launched the Women’s Mentorship program, designed to encourage professional development of women through a mentoring relationship focused on career growth, skill building, and substantive learning. The pilot cohort launched in February with seven mentor/mentee pairings. The program was so successful that we formed a second cohort in September, with more than 25 mentees participating. Additionally, *WE-Together* and its Working Mothers subgroup organized a program on “Mental and Physical Health Accomplished: Using Your Benefits to Achieve your Goals,” as well as a workshop for “Staying Calm in the Holiday Chaos,” led by personal and organizational coach [Nora Plesent](#).



Carrying on its tradition of choosing a theme each year, in 2023/24 *Proud@Consilio* focused on “intersectionality” in the LGBTQIA+ community. The group kicked off the year with two Pride Month events—a trivia event with BarNone Games, and a workshop lead by deaf queer activist and comedian [Hayden Kristal](#). Hayden taught the attendees various ASL signs related to the LGBTQIA+ community, answered questions, and spoke about the intersection between their deaf and queer identities. Later in the summer, the group invited HR and Talent Acquisition partners to explain the options for employees to self-identify their various demographic characteristics in our human resources systems, and clarify how that information is used—and how it’s protected. To close out 2023, the affinity group held another “Share Your Story” event where group members shared personal stories about their intersectional identities. *Proud@Consilio* also established a mentorship program to connect career veterans with people who are newer to the workforce or newer to Consilio.



In 2023, the *MC-LITE* affinity group—“Multicultural–Learning Inclusivity Teaching Equity”—collaborated with *Proud@Consilio* to support equality and educate employees on the “International Day against Violence or Discrimination for Homophobia, Transphobia & Biphobia.” The group also led a conversation regarding “World Day for Cultural Diversity for Dialogue and Development.” Finally, the affinity group continued hosting its book club called “MC-LITErari,” which read *Illegally Yours: A Memoir* by Rafael Agustin.



The *Consilio Wellness* affinity group continued to sponsor company-wide 5K walk/runs for charity. They also facilitated health checks, flu shots, and eye clinic sessions in local regions. In addition, the group coordinated themed health and wellness webinars throughout the year as part of an ongoing drive to educate and raise awareness on these issues among our employees.



Our *Sustainability@Consilio* EAG continued to bring employees together to find ways to promote more sustainable business practices in our company and our communities. In 2023, the group supported a number of initiatives including battery recycling, volunteering at food banks and soup kitchens, adopting animals as part of an Animal Protection initiative, plastic-free July, and Consilio's "Sustainable Summer." Towards the end of the year, the EAG solicited volunteers to serve as global "Green Champions" to further our engagement with employees around the world on sustainability topics in 2024 and beyond.



In mid-2023 we launched our newest EAG, the Hispanic Affinity Group *¡HOLA!* The group aims to foster an environment that passionately promotes and celebrates the different Hispanic cultures, traditions, and experiences, through its four pillars of execution: Community, Engagement, Enrichment, and Awareness. The group was introduced company-wide during *Consilio World*, and immediately signed up 68 new members. The affinity group celebrated Hispanic Heritage Month with a charity 5K in partnership with the *Consilio Wellness* affinity group, which generated a donation to the charity *Latino Stem Alliance*. The group also created its *¡HOLA!* SharePoint page where they maintain a blog for recipes and a Spotify playlist. The group closed the year with a holiday call where they presented their accomplishments in 2023 and goals for 2024 and engaged with a fun Hispanic holiday trivia!

We formed a new EAG for our Hispanic employees in 2023.

Looking forward to 2024, Consilio will expand its EAG program by launching two new affinity groups with a focus on our global communities, *WE-Together India* and *Consilio Cover to Cover*.



With a kick-off planned for early 2024, *WE-Together India* will aim to foster an environment that passionately invests in and strengthens the capacity of women-led movements to advance meaningful social, cultural, and economic change in our company and personal lives. *WE-Together India* will support and encourage women colleagues from different cultures, ethnicities, roles, and educational backgrounds to be able to come together to express their opinions, exchange views, and develop the skills to succeed in a highly competent and challenging work environment.

In early 2024 we will launch two new affinity groups, one for our women employees in India, and another for our global community of avid readers.



Also starting up in the first quarter of 2024 is our new book club affinity group, *Consilio Cover to Cover*. The group's mission is to create a vibrant community of avid readers within our organization, transcending geographical boundaries and departmental silos, through the shared joy of discussing their varied experiences reading diverse literary works.

## Inclusion Through Learning

### CEO **ACT!ON** FOR DIVERSITY & INCLUSION

In partnership with [CEO Action for Diversity & Inclusion](#), for the fourth consecutive year Consilio hosted a “*Day of Understanding*,” which is a day set aside for employees to engage in candid conversations that bring people together and cultivate understanding.

This year we turned our focus to “psychological safety.” We engaged guest speaker [Devon Walker](#) to help educate our entire global workforce on the concept of psychological safety at work. Devon explained why it’s important for high-performing teams, and he explored ways that we can work collaboratively with each other to build a culture of safety at Consilio. Following Devon’s workshop we distributed resources and tools to facilitate further conversation around psychological safety and to advance our understanding of its importance. We decided to highlight psychological safety for our Day of Understanding because it’s such an important element of an inclusive culture. Unless employees are confident that they can express their ideas and concerns, speak up with questions, and admit mistakes—without fear of being belittled or punished—they will not feel a true sense of inclusion on the team.

In 2023 Consilio also made a significant investment in *LinkedIn Learning* as a development resource for all employees. *LinkedIn Learning* includes substantial content on DEI related issues, and as we move into 2024 we are working to organize thematically-focused collections of courses to share with our team members. We are excited about this ability to provide our entire employee base with convenient access to relevant, high-quality learning resources that will build their DEI competencies.

## Inclusion Through Integration

2023 was another year of exciting growth for Consilio, with the acquisition of LOD and SYKE. Through that transaction we significantly expanded our geographic reach into new countries and new continents and welcomed new team members from around the world. As with past acquisitions, we approached the integration of our LOD and SYKE colleagues with careful attention to ensuring that these new employees feel included in the Consilio community. Throughout the integration process, it’s important to demonstrate that Consilio shares the core values of their legacy organizations, including their commitments to diversity, equity, and inclusion.

This latest acquisition brings with it a new dimension that wasn’t present in other transactions—a broader degree of cultural diversity among our workforce. We now have colleagues in Australia, South Africa, the Middle East, South America, and additional regions of Asia. As we continue to integrate these new teammates into our business operations, we need to be intentional about welcoming this diversity and providing a safe environment for them to express their cultural differences.



# Employee Perspectives: Why “DEI Matters”

In each of our past Annual Reports, we’ve shared the viewpoints of employees on different aspects of our DEI program. This year we solicited input from employees who have stepped up in various ways to participate in our DEI efforts, asking them why “DEI matters” to them and why they choose to contribute their time and energy to this work. Especially at a time when DEI initiatives are in the crosshairs, we thought it was important to give voice to the perspectives of our people, who are the most important aspect of Consilio’s DEI program. Their insights are thoughtful and inspiring.

“My DEI journey started at birth, when I was born into a family that raised me to always believe in equal rights for all and to fight for the greater good. My Aunt Ann, who was one of the first black attorneys in Little Rock, Arkansas, was determined that I would be the next Himmelbaum family attorney, and helped shape my experience as a law student and then as a lawyer. As a founding member of Consilio’s D&I Advisory Board, I am invested in taking Consilio’s vision to the next level. My involvement helps me to work closely with all Consilio employees and to ensure my clientele understands how much we value diversity, equity, and inclusion.

**Canaan Himmelbaum: Director, Global Business Development**



“I serve as the UK’s DEI Co-Chair at LOD. As a gay man, I felt fortunate to work in an environment that not just accepted who I was but actively celebrated it. So, I jumped at the opportunity to play my part in helping others feel the same. Together, we’ve learned that support, allyship, and inclusion come in lots of different ways, whether by organising a large event or just checking in with a colleague one morning. We can all do things to make our organisation a better place – and that’s a great foundation for celebrating a diverse workforce.

**Elliot Kushner, Client Solutions Manager, LOD**



“ I joined the DEI team at Consilio because I believe that each of us, no matter our background, colour or impediment, should be given the same opportunity to develop and contribute to our growth. I am proud to be associated with a company that puts diversity and inclusion at the forefront of its business.

**James Morrey-Jones: VP, Project Management, EMEAA**



“ I offered to help lead our WE-Together women’s group because I wanted the opportunity to meet other professional women who are juggling a career and parenting, and experiencing the related struggles. The programs that this affinity group provides have given me practical advice and actions I can take to better manage both my career and personal life.

**Karen Hornbeck: Senior Manager, Advisory**



“ I’ve been involved in the DEI group at LOD to help deliver the agenda for awareness of diversity matters across the board. It’s a great way of getting to know each other and celebrating all that makes us the individuals we are. Celebrating diversity also creates a safe and accepting environment for all our people, clients, and lawyers.

**Kajal Parekh: Managed Teams Lead Lawyer, LOD**



“ Coming from a smaller company that didn’t have a formal DEI program, I was excited to join Consilio’s DEI Advisory Board and further educate myself in different areas of the larger DEI community. Growing up biracial, I have always felt a part of both communities, yet excluded from both as well. So for me, inclusivity has always been top of mind. If we don’t discuss challenging topics, and give voice to tough issues, we won’t address them. And without active engagement, progress won’t happen. I am very proud of the work we do at Consilio.

**Lamine Reese: Director, Enterprise Talent Solutions**





“As someone with a neurodiverse child, I have the ability to look at D&I efforts through multiple lenses—as an employee who participates in and benefits from our efforts, as leader who designs our compensation and benefits plans, and as a parent who dreams of a world of inclusion for her child in the future. The efforts of Consilio and other large organizations give me lots of hope for future generations of neurodiverse members of the workforce.

**Linda Caldwell: VP, Global Total Rewards**



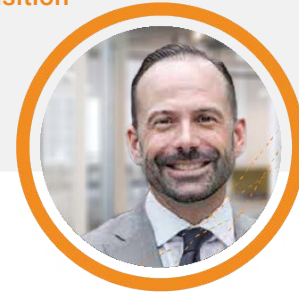
“I firmly believe that celebrating our differences unites us and helps us build a better society. When my daughter was born in 2021 with Down Syndrome, it became even more vitally important to me to help all those like my daughter to have opportunities to utilize and be appreciated for their unique skills. I am dedicated to helping our company continue to become an employer that will celebrate diverse employees and help them thrive.

**Meggan Capps: Director, Business Development**



“As a member of the DEI Advisory Board, I am surrounded by individuals from diverse backgrounds and perspectives, which has broadened my understanding of different cultures, experiences, and viewpoints. This exposure has helped me become more open-minded, adaptable, and empathetic in my approach to work. Moreover, the discussions and insights shared within the board have challenged my own biases and assumptions, prompting me to question my unconscious biases and strive for greater inclusivity in my interactions and decision-making processes.

**Matt Sumrack: VP, Talent Acquisition**



“I volunteered to chair the *Proud@Consilio* affinity group to serve as a model for others through my leadership role in the business organization, and by being visible as a voice for LGBTQIA+ employees at Consilio. I have never been shy about my identity and have always felt welcome to share my experience with colleagues, so it’s special for me to be involved in creating a space within Consilio where members of the LGBTQIA+ community can feel that same support, celebrate, raise concerns, and learn together.

**Sean Reisman: Associate Director, Review Portfolio Lead**

“My journey as a first-generation Singaporean has been deeply rooted in the values of diversity and inclusion from the very beginning. Growing up, I was immersed in a tapestry of cultures, languages, and traditions, both within my own family and throughout the vibrant mosaic of the Singaporean society. This early exposure instilled in me a profound appreciation for the richness that comes from embracing differences. As I navigated through schools and later entered the workforce, I was acutely aware of the importance of being in environments that respected and celebrated individuals from diverse backgrounds. It wasn't just about tolerance; it was about fostering genuine understanding and unity amid our differences.

**Sharon Pidakala: People & Development Associate, LOD**



“Being involved with diversity and inclusion fosters a richer, more innovative environment by bringing together various perspectives and experiences. It promotes equity, helps break down barriers, and creates a more supportive environment. Embracing diversity and inclusion is not just morally right, but also enhances creativity and problem-solving.

**Taffi Schurz-Jaso: Managing Director, Central North Region**



# OUR COMMUNITIES MATTER

In 2023 Consilio significantly expanded its support for organizations in our communities across the globe that promote diversity, inclusion, and social justice, as well as those that serve historically underserved populations. In addition to our corporate support, Consilio employees offered up their time and energy to volunteer with these organizations and contributed monetary donations that totaled many thousands of dollars. Contributions on behalf of Consilio in 2023 increased more than 60% over the prior year. These are some of the charitable and professional organizations we supported this year—

Advocates for Children of New York	Corporate Leadership Award Dinner	Hong Kong Breast Cancer Foundation	National Immigrant Justice Center	Sonia and Celina Sotomayor Internship Program
AgeUK	Dallas CASA	Houston Food Bank	National LGBTQ+ Bar Association	South Asian Bar Association of Washington DC
Alaska Cares	Day One Voices Against Violence	Houston Young Lawyers Foundation	New England Legal Foundation	Southern California Chinese Lawyers Association
American Heart Association	DC Children's Law Center	Hudson Shea Angel Walk	NJ LEEP	St. Jude Children's Hospital
American Heart Association - Orange County	Diya Ghar Early Childhood Care	Illinois Action for Children	North Carolina Park Clean-Up	STS. CONSTANTINE AND HELEN Antiochian Orthodox Church
Animal Protection Initiative at Bannerghatta Biological Park	Direct Relief	Interfaith Dallas	Patriots Path Council Boy Scouts of America	Support Center for Child Advocates
Asian American Bar Association of Greater Chicago	Equal Justice Works	Jackson Chance Foundation	Pencil for Schools	Survivor Fitness Foundation
Asian Pacific American Women Lawyers Alliance	Feeding America	Latino Stem Alliance	Pet Rescue Australia	Swim Across the Sound/ Swim Across America
Attorneys Serving the Community	Feeding Tampa Bay	Law Rocks	Philabundance	The Greater Boston Food Bank
Be Like Jake	Food Bank of Central & Eastern North Carolina	Lawyers Club of San Diego	Philadelphia Bar Association Supporting Support Center for Child Advocates	Urban Assembly School for Law & Justice
Breast Cancer Research Foundation	Food Bank of South Jersey	Levine Music Gala	Pink Walk 2023	Volunteer Lawyers for Justice
BUiLT - Blacks United in Legal Technology	GiveIndia	LGBTQ+ Bar Association Lifeline	Public Interest Law Center - Philadelphia	Volunteers of Legal Service
Cancer Wellness Center	Glamourgals	Lifeshare	Ronald McDonald House	Women's Bar Association of DC
CARPLS	Hackney Food Bank	London Legal Walk	RBC Race for the Kids	Women's Bar Association of DC Foundation
Chicago Bar Foundation	Hispanic Bar Association of New Jersey	London Soup Kitchen	San Diego Volunteer Lawyer Program	World Central Kitchen
Community House	Hispanic Bar Association of Philadelphia	Mid-Ohio Food Bank	Second Round Foundation	
	Hispanic National Bar Foundation	Mind UK	SeniorLAW Center	
	Homeless Link	Minority Corporate Counsel Association		
		Movember		



Consilio also offers our employees the option to make charitable donations through Bonusly, our recognition and rewards platform. Employees receive awards of Bonusly “points” from their colleagues in recognition of their contributions, or as a “thank you” for going above-and-beyond on a project. Employees can redeem their Bonusly points for various merchandise, services, and gift cards, or they can choose to use their points to make a donation to a charitable organization. The dollar value of our Bonusly donations in 2023 increased by 20% over 2022. This year 182 employees chose to redeem points with a charitable donation, contributing to the success of 75 different non-profits. We greatly appreciate the donations from those employees, but we know we can do better! In 2024 we intend to roll out a campaign to raise awareness among our employees about the option to contribute Bonusly points to charity, and we will continue to add more options for non-profit organizations.

## Spotlight: NJ LEEP

NJ LEEP (Law and Education Empowerment Project) is a college access and success program serving low-income and first-generation students and families in the greater Newark area. NJ LEEP’s College Bound program empowers middle and high school students with both the academic and social-emotional skills necessary to succeed in college and beyond. 100% of NJ LEEP students graduate high school; 85% are currently enrolled or have graduated from college. Consilio is proud to have joined many of our corporate and law firm clients in supporting this worthwhile organization over the years.



In 2023, a portion of Consilio’s donation to NJ LEEP was made in honor of one particular corporate client, whose exceptional work by its legal department in advancing DEI in the profession was recognized with an “Employer of Choice” award from the Minority Corporate Counsel Association.

We asked one of our financial institution clients to share some details about its partnership with NJ LEEP, and how the program provides the students with meaningful, practical development opportunities—

- Each summer the company hosts a group of four to six 10th graders for a “week-on-the-job” experience. On the first day, the students are given a project to work on over the course of the week, and on the final day they are given the opportunity to present their project to the host team. Over the course of the week, the students meet with leaders in different functions of the business—not just legal, but also HR, banking, and communications, for example—to learn about those professions and the career paths available. One year the eDiscovery team developed a program to educate the students about this area of the law using the investigation of the “deflategate” scandal as a real-life teaching tool.
- In conjunction with their outside counsel firms’ summer associate programs, the company partners with the firms to give the students exposure to law firm career opportunities. This includes hosting the students and summer associates for “etiquette lunches” at high-end restaurants to help the students develop important professional social skills.
- Other ways the company supports NJ LEEP students include serving as mentors; participating in resume and college application review sessions; organizing clothing drives for professional attire; and facilitating programs on financial literacy.

The testimony of an NJ LEEP graduate, who not only succeeded in college but also achieved a law degree, conveys the powerful impact of this program:

“I had always known that I wanted to be successful, but I did not have any sense of direction. NJ LEEP helped me with that. NJ LEEP provided me with structure and helped me reach into my untapped potential. Thanks to the skills that I initially started sharpening as a NJ LEEP student, I was able to quickly adjust to my new position as a Law Clerk and be of great assistance to the Judge. NJ LEEP’s impact on my life will always be appreciated and I will be forever grateful.” NJ LEEP Class of 2015, Rutgers University Class of 2019, Seton Hall Law School Class of 2022.

Consilio looks forward to getting more deeply involved with NJ LEEP in the future, and to partnering with our clients in developing this pipeline of incredibly talented young people for careers in our professions.

## Spotlight: BUiLT

In March of 2023, Consilio sponsored the official launch of Blacks United in Legal Technology (BUiLT), which took place during the Legalweek conference in New York. BUiLT was formed in 2022 from the vision of Consilio's own James Edwell and the combined leadership of influential members of the legal and legal technology communities. Those founding leaders included an Associate General Counsel of Litigation for a major insurance company, an experienced career coach with a history of creating and growing similar groups, an executive lawyer from a leading re-insurance company, and an eDiscovery Manager in one of the world's largest financial institutions. All of these founders identify as members of the African diaspora and are committed to the mission of BUiLT:

BUiLT is dedicated to advancing inclusion and diversity by creating opportunities within the legal technology field for those that identify as part of the African diaspora to engage collectively in education, leadership, mentorship, service, advocacy, research, and career development.

Co-founder Zelda Owens, the career coach from Owens Williams and Associates, believes "our impact is multifaceted and far-reaching. BUiLT is actively dismantling barriers to entry, creating pathways for mentorship, and providing educational resources that equip our community with the skills necessary to excel in the evolving digital landscape."

With the help of sponsors like Consilio, BUiLT has been able to chart a partnership with sponsors and allies that enables the group to effectuate its vision. The ultimate goal of BUiLT is to become a gateway for members of the African diaspora to access more and better opportunities in the legal and legal tech fields. On behalf of the founders of BUiLT, Zelda expressed gratitude for Consilio's support for BUiLT.

"By supporting BUiLT, Consilio not only aligns itself with a powerful movement towards multicultural competency and innovation but also contributes to cultivating a robust community enriched by diverse talent and perspectives. The BUiLT leadership team and I look forward to cultivating further a symbiotic partnership with Consilio that propels our shared values to new heights as well as showcases the tangible rewards of diversity, equity, and inclusion."



## Spotlight: World Central Kitchen

“In the worst moments, the very best of humanity shows up.” – Chef José Andrés

This year Consilio proudly supported World Central Kitchen (“WCK”), which has served more than 350 million meals worldwide to those suffering from devastating food and water insecurity in crises around the globe. In addition to a direct donation from the company, in 2023 we also added WCK as an option for employee contributions through Bonusly.

WCK’s story began in 2010 when acclaimed chef José Andrés, ready to help with his culinary knowledge and talent, headed to Haiti following a devastating earthquake. Cooking alongside displaced families in a camp, he was guided on the proper way to cook black beans the way Haitians like to eat them: mashed and sieved into a creamy sauce. It wasn’t just about feeding people in need—it was about listening, learning, and cooking side by side with the people impacted by the crisis. This is the real meaning of comfort food, and it’s the core value that José and his wife Patricia established for World Central Kitchen. WCK is first to the frontlines, providing meals in response to humanitarian, climate, and community crises. According to José, “Food has the power to be the nourishment and hope we need to pick ourselves back up in the darkest times.”



For updates throughout 2024 on the community organizations we support at Consilio, please follow our social media feeds on LinkedIn or Twitter/X.

## Supplier Diversity

In 2023 we continued the efforts started in 2022 to develop repeatable, scalable processes for our Supplier Diversity program. This year Consilio increased its spend with diverse-owned businesses by 40% as compared to 2022.

As Consilio worked to build out its broader ESG program, we realized that we needed to incorporate our Supplier Diversity policies and objectives into an overall global Sustainable Procurement program. Accordingly, we assembled a cross-functional team comprised of business leaders responsible for procurement, members of our ESG task force, and DEI leaders to take a holistic look at our procurement practices and create a cohesive set of policies and procedures going forward. We anticipate completing that work in early 2024. From there, we will develop a plan for publishing those documents and educating our leaders on principles of Sustainable Procurement, including the importance of seeking out and doing business with diverse-owned and small businesses.

We have several companies in our supply chain who have “self-certified” to Consilio that they are woman- and/or minority-owned. In 2024 we intend to begin working with these providers to guide them in achieving a recognized diverse supplier certification.

Consilio increased its spend with diverse-owned suppliers in 2023 by 40%.

# The Future of DEI Matters

As we publish this report looking back on 2023, we are already looking ahead to 2024 and the opportunities we have to mature, grow, and refine our DEI program. We're excited about the future because we are served by a team of employees who are passionate about advancing DEI, and we are guided by leaders who are dedicated to supporting the work and providing the resources necessary to make real progress.

Our employees have told us that DEI matters to them. We know that it matters to our clients to have partners that are committed to advancing DEI in our workplaces and communities. So we will continue to lead the way in our industry with our DEI program and demonstrate to all our stakeholders that DEI matters.



# Appendix: Definitions and Conventions for Metrics Analysis

## Data Gathering and Reporting

**Gender data** are reported globally.

**Racial and ethnic data** are reported for employees in the US only. The data reflect only those employees who choose to self-identify their race and ethnicity. In 2023, 88% of US corporate employees elected to provide this information.

**Age, veteran status, and disability status** are reported for employees in the US only.

**Acquired companies** LOD and SYKE are not included in the published metrics, except for a small number of employees located in the United States.

**Percentages** are typically rounded to the closest whole number, and in some instances totals will not add to 100%.

## Representation

**Representation** data indicates how particular groups are represented in terms of their percentage of the workforce as a whole, or their percentage of the particular function, level, or other segment of the workforce being examined.

**Comparison benchmarks** are called out where we can identify a source of information that's reasonably comparable to the segment of our workforce. Such comparisons can be useful in assessing where we have opportunities to improve our diversity and establishing aspirational goals for representation. However, identifying appropriate demographic benchmarks against which to measure ourselves is difficult, because we employ a wide variety of occupations in our workforce, with different labor markets for the different occupations. Also, for some of our roles—especially those in our eDiscovery and other legal technology functions—we can find no published industry demographic data to use as a benchmark.







## Race and Ethnicity Categories

Race and ethnicity data are presented in this report based on voluntary self-identification by employees, using categories established by the US Equal Employment Opportunity Commission. Those categories are defined as follows:

**Asian:** A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian Subcontinent, including for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.

**Black or African American:** A person having origins in any of the Black racial groups of Africa.

**Hispanic or Latino:** A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race.

**American Indian/Alaskan Native:** A person having origins in any of the original peoples of North and South America (including Central America), and who maintain tribal affiliation or community attachment.

**Native Hawaiian or Other Pacific Islander:** A person having origins in any of the peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

**White:** A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.

**Two or More Races:** A person who identifies with more than one of the above races.

We recognize that these categories are imperfect. Some are too broad, and some are too narrow. Because they originate from the US government, they are very US-centric. One of our initiatives for 2024 is to explore other self-identification categories for our employees that will allow them to describe their racial and ethnic background more accurately, but still enable the company to comply with EEOC reporting requirements.

## Levels

In this report, when examining diversity at different levels of the organization, the following definitions apply:

**Senior Leadership:** Employees on the executive team, and those at the EVP, SVP, VP, and Managing Director Level. (Salary levels E1, E2, E3, and E4)

**Director Level:** Employees with titles of Director, Senior Director, and Regional Director. (Salary levels M4 and M5)

**Manager Level:** Employees with titles of Supervisor, Associate Manager, Manager, and Senior Manager. (Salary levels M1, M2, and M3)

