

# Associate Access and Engagement at Pinnacle in 2024

Company leaders aim to create a great place to work for all our associates, which depends on engaging every associate so they feel supported, safe and like they belong. We believe that highly engaged teams make highly effective teams and that intentionally building a culture where associates of all backgrounds, experiences and viewpoints feel like one unified team is critical to our success.

We are committed to being more vocal and focused on our efforts toward creating a great place to work for all. We are guided by the foundational elements of our associate guide, code of conduct and other applicable policies, namely that all people deserve a great place to work and do business and that every community deserves an equal opportunity for economic prosperity.

In 2021, we identified a few key strategic areas of focus that we believed would help us ensure our firm is a great place to work for every single associate. Our annual results indicate those strategies were working. As a result, in 2024 our primary focus was to continue executing them consistently throughout our firm.

Here are some of the actions we took in 2024 to achieve our objectives.

## Recruitment

- Members of our associate and client experience team partnered with leaders throughout the firm to leverage our expanded LinkedIn networking/recruitment strategy. They worked with leaders in multiple markets using LinkedIn's Recruiter module to expand our ability to identify potential candidates from all backgrounds that should be included in our recruit and referral-based hiring approach in targeted roles throughout our firm.
- We also continued to provide and expand the following recruitment focused programs:
  - *Intentional Inclusion online course*: Provided to all associates and all new associates who joined the firm in 2024. This is a custom course on unconscious bias that discusses common biases and how we can look to mitigate them within our firm's hiring, succession and associate development processes. The goal is to foster stronger connections among associates of all backgrounds and beliefs so that we can continue to create highly engaged and highly effective teams.
  - *Our Recruiting Approach Discussion Series*: Archived discussion with associates across the organization explaining our approach to recruiting at Pinnacle and how all leaders and associates can help us continue to build a workforce that is representative of the communities we serve.
    - This archived session is available for on-demand associate viewing by all associates.

## Development

- Continued the process of intentionally developing associates from all backgrounds for future leadership roles through intentionally focused succession plan reviews and the identification of high potential associates with leadership aspirations.
- Continued and expanded the frequency of our Leadership Learning Community for Influential Leaders, which is the initial developmental step for potential future leaders within our firm who do not currently have direct reports.
  - We conducted 4 of these learning communities for potential future leaders in 2024.
  - 81 potential future leaders completed this leadership learning community in 2024.

## Creating a Great Place to Work

- *Councils focused on engagement and connectedness:* We expanded our Councils in 2024, bringing together associates of all backgrounds and beliefs in each market to help execute firm wide initiatives that promoted connectedness, engagement and belonging within their local markets.
  - 243 associates volunteered in 16 market level Councils to assist us across our firm's footprint.
  - Increased the number of councils to 16 market level councils up from 14 in 2023.
- Our local councils executed a series of initiatives to improve the engagement, connectedness and belonging of associates within our firm. Some of those initiatives include:
  - Connection Lunches – Council members were provided with gift cards that could be used to take an associate to lunch that they don't know well or have limited contact with from a different background and/or job role than theirs. The purpose of these lunches was to encourage the development of personal connections over a meal.
  - Living Room Conversations – Council members used the living room conversations template to create a safe space for small groups of associates to engage in meaningful conversations in a productive way that promote connectedness, caring, understanding and trust.
  - Women of Influence – The purpose of these meetings was to create a learning opportunity in a casual setting for associates to connect with women leaders (women of influence) within our firm. They expanded their networks, created authentic mentor/mentee relationships and fostered a sense of belonging across teams through conversations that promote understanding and trust.
  - Hidden Figures Movie Club Discussion –The purpose of this discussion is to explore the lessons we can learn from this inspirational movie that will help us inspire leaders and associates in our firm to identify and tear down barriers to meaningful interpersonal connections.
  - Intranet Blogs - Council members contribute one or two blogs monthly for the Intranet home page to create connectedness and a better understanding of different cultures and backgrounds.
- *Work Environment Survey Inclusiveness Assessment:* Continued to provide our inclusiveness assessment of each leader's work environment survey results to help leaders intentionally focus their attention on high impact areas of the work environment they create. The goal is to simultaneously create highly engaged and high performing teams while promoting an inclusive work environment for all associates.
  - 52 leaders attended this live virtual training session on this revised work environment assessment.

## Leadership Accountability

- On an annual basis, all associates including leaders of people receive training on strategic elements of our custom Intentional Inclusion training course, which is integrated within our Equal Employment Opportunity and Affirmative Action training.
  - 100 percent of leaders and associates completed the Equal Employment Opportunity and Affirmative Action training in 2024.
- Continued and expanded the frequency of our Leadership Learning Community process, including our integrated focus on inclusive leadership practices that are aligned with the core elements of successful leadership at our firm.

- We conducted 3 of these learning communities for leaders of people in 2024.
- 44 leaders of people completed the leadership learning community in 2024.
- Offered 3 additional leadership focused training sessions in 2024.
  - Inclusive Leadership: The Power of Personal Connectedness - In this session, we explore the question “why are inclusive teams important?” Additionally, we explore how Pinnacle seeks to leverage associate connectedness through our focus on inclusive leadership practices. Leaders learn why this is a key organizational approach to building highly engaged and highly effective teams that demonstrate meaningful levels of inclusiveness.
    - 247 leaders and associates completed this training in 2024.
  - Connecting through Conversations – In this learning session, we assist leaders in building confidence and proficiency when engaging in conversations across differences. Through this approach, leaders can have conversations that create connections so that we can leverage the power of different perspectives to create a competitive edge for our firm.
    - 262 leaders and associates completed this training in 2024.
  - The Art of Storytelling – In this learning session, we help leaders learn how storytelling can be used as a powerful leadership tool to help them share their vision and build connections on their team. We help leaders learn to craft their own unique stories which can be used to help them address issues, connect with their audience and share a clear message that aligns their team.
    - 117 leaders and associates completed this training in 2024.