



# doing more together

2024 SOCIAL IMPACT REPORT

DIX & EATON +



For more than 70 years, Dix & Eaton has built its business around several core values. One of those values is inherent in our daily work: collaboration. We recognize the power of working together – with our team members and our clients – to strengthen relationships and outcomes.

Together and individually, we are empowered to make an impact that reaches beyond our work and extends into our communities. And during the last year, the breadth and depth of our commitment not only doubled in size, but also significantly increased in impact.

In November 2023, Dix & Eaton announced its [acquisition of Standing Partnership](#), a St. Louis-based marketing communications consultancy that specializes in helping clients drive growth and mitigate risk. The integration aligns our strengths, expands our capabilities and unites two firms that have social impact embedded in their collective DNA.

We entered 2024 as one firm with two operating groups and a shared energy around discovering what is possible. Our combined organization has more than 60 employees in eight states.

We are proud to support organizations and initiatives that reflect our passions and improve the quality of life in our communities. We also cultivate a culture that prioritizes development, flexibility and inclusivity for our team. This report illustrates our social impact over the past two years and highlights our belief that our future involves **doing more together**.

### *The Dix & Eaton Way*

Social impact, community engagement and economic development that benefit the communities and audiences we interact with on a regular basis have long been priorities for Dix & Eaton. Our co-founders, Henry Eaton and John Dix, believed pro bono work created opportunities for influence, impact and a way to become an asset to the community. They set the tone and built a legacy that continues to drive us forward. More than 70 years later, we continue to be guided by an unwavering commitment to community improvement, philanthropy and volunteerism.

### *The Standing Partnership Culture*

For more than 30 years, Standing Partnership has been nationally recognized for its agency leadership, workplace culture and growth. The firm operated as a women-owned boutique agency prior to being acquired by Dix & Eaton and becoming part of Dix & Eaton's employee stock ownership plan (ESOP). Today, Melissa Lackey, former owner and now group president of the Standing Partnership operating group, continues to instill the firm's values of collaboration, ambition, innovation and integrity into our daily work.



the DNA of D & E

DIX & EATON +





When I reflect on the work and purpose of D&E, I see an intersection of converging paths. One of those multilane, multidirectional intersections where some roads are straight and steady, some are curvy and unpredictable, and others are rocky and hidden. Somewhere at the center, surrounded by all of these pathways, solidly rest our firm and our people.

This is where we operate – at the intersection of numerous key audiences: clients and customers, colleagues, communities, and even media and professional organizations. Our role as a dedicated service provider is enhanced by a commitment to supporting and listening to these audiences to serve them best. Encompassing our Dix & Eaton team and our Standing Partnership colleagues, the D&E organization is a team of storytellers, marketers, listeners, counselors and connectors. We craft narratives that resonate with diverse groups and demonstrate understanding across complex landscapes – and that ultimately shape impact and outcomes.

D&E has trusted in the power of connected storytelling since its founding more than 70 years ago. Our intent to connect audiences, standing at that intersection to help others navigate the path they are on, is at the heart of what we do. And as this report demonstrates, we have always viewed our role as one that goes well beyond our daily work. We are highly invested partners, creating positive change in all the places we call home.

I am an enormous believer in the power of teams, and how the collective can stretch well beyond individual capability. When we work together on a program or project that adds value and makes an impact or contributes to our communities, we strengthen our relationships, internally and externally. In collaboration with others, we often find that we can far outperform what we ever thought possible (take, for example, our service project for Rise Against Hunger – we were humbled and amazed that our teams packed 10,152 meals in just two hours!).

Our 2023 acquisition of Standing Partnership profoundly expands our ability to create results and impact for all our critical audiences. Over

the past year, we've seen the expanse of our reach and added an exponential factor with more capabilities. Now, we are moving forward as one organization united by the same values, core principles and core commitments to each other and our clients that have always been the bedrock of both organizations.

As you'll find on the pages that follow, this year's Social Impact Report illustrates each word in its theme: **Doing More Together**. I am extraordinarily proud of our performance this year (and over our long history), and of the value we bring to our clients, communities and partnerships. I am so grateful to our teams, clients, communities and partners – and thank you for reading our report.



Chas Withers  
Chairman & Chief Executive Officer



“Working together to help our clients has always been the core mission of D&E, and that serves as the foundation and launching point for the impact that we make on each other and our communities. I believe that success is best when it’s shared.”

# the difference we make in our communities

At D&E, we measure our impact through time, talent and treasure and uphold a constant effort to foster positive change that aligns with a sense of purpose. Our expanded company footprint allows us to make an even greater impact – not only in the communities where we live and work, but also across the country. That impact encompasses multiple levels, including firm and individual volunteer efforts, board service and pro bono work.

We aim to actively engage with and empower organizations in our communities that champion disenfranchised populations. These vital organizations confront some of the most pressing needs in our communities, creating access to:

- Nutritious food
- Essential clothing
- Safe housing
- Accessible health care
- Life-changing trauma services
- Reliable access to technology
- Quality education
- Meaningful employment
- Small business development
- Inspiring youth programs
- Enriching arts and culture



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**Dix & Eaton has always felt that as employees advance professionally and grow as leaders, they have a responsibility to support those around them. Our team embraces the opportunity to give back to the communities in which they live and takes pride in doing so.”**

– Lisa Rose, GROUP PRESIDENT, CLEVELAND OPERATING GROUP

**60+**  
employees

**~400**  
volunteer hours  
since 2022

**80+**  
organizations  
supported

### Volunteer Efforts

We strive to give back to causes that resonate with our employee owners' passions and values and contribute to positive change in our communities. Many of our firm volunteer efforts have immediate impact, from packing food at the Greater Cleveland Food Bank to fulfilling holiday wishes for children in foster care at Our Little Haven. We also support a variety of nonprofit and professional organizations through firm donations.

This spirit of volunteerism is also ignited in our personal lives, and team members are encouraged to engage in a variety of service projects on their own time to support issues that are close to their hearts.

### Board Service

As a firm, our colleagues serve on more than 30 national and local boards, many centered on addressing social needs. Our team holds board positions with United Way, the YMCA, the YWCA, DigitalC, Helping Hand-Me-Downs, Greater Cleveland Sports Commission, Cleveland Leadership Center, Business Volunteers Unlimited, Ronald McDonald House Charities, Mi Work Matters, the Rock and Roll Hall of Fame, The Diversity Center of Northeast Ohio, FOCUS St. Louis, Missouri Botanical Gardens Corporate Council, Greater Cleveland Partnership, Playhouse Square and many more.

Participation on these boards gives team members meaningful ways to grow as leaders and deepens their understanding of how an organization can run effectively. This, in turn, enhances our ability to guide clients and other organizations, and to see connections across sectors for amplified impact.



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**We are transparent and intentional about exposing our team to what it takes to run a business. That knowledge helps team members add greater value when sitting on a board, and it accelerates their learning about how other organizations operate. Board involvement enables our people to ask better questions and bring different perspectives to our practice and our clients.”**

– Melissa Lackey, GROUP PRESIDENT, ST. LOUIS OPERATING GROUP

We offer our employees

**8** hours of service time off each year so they can dedicate their volunteer time to the causes of their choice.

Standing Partnership has been recognized by the *St. Louis Business Journal* as a finalist for its Corporate Philanthropy Award for the past three years.



### *Pro Bono Work*

**P**ro bono projects deliver critical results for charities that could not otherwise afford marketing and communications services. Our pro bono efforts help nonprofit organizations further their mission and enable us to build stronger connections to critical initiatives that are shaping the future of our communities.

Standing Partnership has supported **Five Acres Animal Shelter**, **United Way of St. Louis** and the **Special Education Fund** through pro bono work over the last two years. Dix & Eaton has supported **Esperanza**, a nonprofit providing scholarships and mentoring to Hispanic students and families in Northeast Ohio, since 2022 and more recently engaged with **Getting to We**, an organization that fosters inclusivity and social trust.



### *Investing in Social Trust*

As Dix & Eaton continues our journey into diversity, equity, inclusion and belonging (DEIB) for all, we are connecting with organizations that promote multicultural and multiracial living. In 2024, we partnered with Deborah Plummer, a psychologist, university professor, author and founder of **Getting to We**, a nonprofit that works to build social trust among diverse communities.

Plummer recently produced *Trust in Black & White*, a documentary that is the culmination of decades of DEIB work and captures how Black and White women experience contemporary race relations in America. We helped market the film before its premiere at the Cleveland International Film Festival by creating the film's website and engaging local media to promote and generate awareness for Plummer and her co-producer, Lori Stevic-Rust.

We continue to work with Getting to We to promote its DEIB Edutainment™ events, which use the transformative nature of the arts to help people understand their shared core identity as humans and relate to each other without fear.

Nearly

**\$350,000**

in pro bono work and board service donated since 2022.

# expanding our impact

# TOGETHER

**O**ur combined enterprise and distinct operating groups make a significant impact through group volunteer activities. These opportunities to **do more together** unite our teams around a common purpose and further the missions of organizations in our communities.

**60+ Team Members. 2 Hours. 10,000+ Meals.**

The integration of our two operating groups into one firm means that we can expand our impact, and we realized the expanse of our reach through a service project that we completed at our all-staff, in-person meeting in May 2024. The meeting marked the first time our colleagues gathered as a combined enterprise. As part of our gathering, we partnered with Rise Against Hunger and packaged 10,152 meal pouches for families and communities facing food insecurity. The meals, which were distributed to the Philippines, will provide 47 children with one meal a day for an entire school year.

## *Supporting Families in St. Louis*

In 2023, the Standing Partnership team packed 600 bags of toiletries for LifeWise StL, a nonprofit that provides programming to help under-resourced families access clothing and household supplies, as well as education, employment and therapy programs.

In another group effort, the Standing Partnership team collected clothing, toys, books, art supplies and other gifts to make the holidays special for children living in foster care.

## *Packaging Meals for the Greater Cleveland Community*

For the last two years, the Dix & Eaton team has volunteered at the Greater Cleveland Food Bank and packaged food for distribution to local food pantries and community shelters. In 2023, we assembled meal boxes that included pasta, rice and canned goods. During our latest service project, we packaged more than 2,000 pounds of carrots for delivery at the food bank's distribution hub.



# organizations supported by



The list below includes organizations we have supported over the past two years, through individual volunteering time, team activities, financial contributions, board participation and pro bono work. We are proud to maintain connections with so many organizations that do good in our communities and beyond.

## Dix & Eaton

- 100 Women Strong Ohio
- The 50 Club of Greater Cleveland
- Allison Rose Foundation
- Ann Arbor Women for Good
- The Arthritis Foundation of Northeast Ohio
- Bluecoats
- Breakthrough Schools
- Business Volunteers Unlimited
- Catholic Charities Diocese of Cleveland
- Cleveland Leadership Center
- Cleveland Metropolitan School District
- The Cleveland Museum of Art
- Colors+
- Community Life Collaborative
- Cuyahoga County Immigration Legal Services Fund
- DigitalC
- The Diversity Center of Northeast Ohio
- Earthworks Urban Farm
- Esperanza, Inc. (Cleveland)
- Federated Church
- Friends of the Rouge
- Frontline
- Food for the Hungry
- Greater Cleveland Food Bank
- Greater Cleveland Partnership
- Greater Cleveland Sports Commission
- Group Plan Commission
- Holt International Children's Services
- Holy Name Hot Meal Program
- John Carroll University Alumni Association
- Kalamazoo College Alumni Association
- Linking Employment, Abilities and Potential (LEAP)
- Magnificat High School
- Mi Work Matters
- Playhouse Square
- Rock and Roll Hall of Fame
- Ronald McDonald House Charities of Northeast Ohio
- St. Angela Merici School
- St. Ignatius
- St. Joseph Academy
- St. Mary of the Falls
- United Way of Greater Cleveland
- University of Notre Dame Alumni Association
- The YMCA of Greater Cleveland

## Standing Partnership

- Affton School District
- BJC Patient Hospice Funds
- CARE STL
- Catholic Charities Diocese of Evansville
- City of Kirkwood
- Concord Trinity United Methodist Church
- Devon Oaks Assisted Living
- Entrepreneurs Organization (EO)
- FOCUS St. Louis
- Friends of Jefferson Barracks
- Gateway Region YMCA
- Grace Church
- Hands On Kirkwood
- Helping Hand-Me-Downs
- Holy Redeemer School
- Junior League of St. Louis
- Kids Against Hunger
- LifeWise STL
- Literacy Volunteers of Morris County
- Little Bit Foundation
- Missouri Botanical Garden
- Murder-Suicide Loss Network
- My Sister's Keeper Success Institute
- Nurses for Newborns
- Operation Food Search
- Our Little Haven
- Parents for Equity
- Room at the Inn
- Rosati Kain High School
- Rung for Women
- St. Gerard Majella
- St. Louis Language Immersion School
- St. Louis Small Business Empowerment Center
- Stray Rescue
- Triumph Over Trauma
- United Way of Greater St. Louis
- VA Press
- Woodland Pattern
- YWCA Metro St. Louis



# how we care for our people

We want our colleagues to thrive at D&E and recognize that a culture of support encompasses multiple dimensions. In order to attract and retain top people, we provide a competitive benefits package, opportunities to learn and grow, and flexible schedules to encourage our colleagues to balance life in and out of work.

## *The Value of an Owner Mindset*

Our status as an employee-owned firm, as well as the added benefit of our employee stock ownership plan (ESOP), is a differentiator for talent recruitment and retention. The meaning and significance of an “owner mindset” will continue to be a North Star for us going forward.

This owner mindset is an individual and collective attitude. It represents investment in the shared success of the firm, including personal and team accountability, and sharing input about the work we do and how we make an impact. On an individual level, an owner mindset means taking responsibility for how we contribute and interact with our clients and teammates, as well as how we represent the firm and act as advocates in our communities.

We recognize the importance of social impact – and as our organization continues to grow, we see even more prominently what we can accomplish by **doing more together**. Read more about our ESOP on [page 13](#).

## *Encouraging Open Communication*

Gathering regular feedback from our employees is important to help us identify what is going well within our organization and where we can dedicate additional attention. We conduct an annual employee engagement survey and use a third-party tool to send shorter pulse surveys on a regular basis. The pulse surveys help our leadership team monitor employee satisfaction and assess trends.

Survey results in recent years have led to:

- Additional benefits, including a Mental Health Day, pet insurance and the observation of Juneteenth as a company holiday
- Expansion of onboarding topics
- New ideas for learning and development within the organization
- New office amenities to better support collaboration

Our employees across the enterprise receive paid time off for 11 national holidays, a Mental Health Day to use at any time and the option to incorporate flexible Friday hours into their schedules.

### HEALTH & WELL-BEING

- Medical, dental and vision benefits for a variety of family structures
- Firm contribution to Health Savings Accounts
- Firm-paid employee assistance program
- Pet insurance and pre-tax plans to offset additional expenses

### PAY & INCENTIVES

- Competitive salary, bonuses and merit increases
- ESOP participation
- Firm contribution to 401k
- Awards for service years and the annual “Outstanding Owners” award

### LEARNING & DEVELOPMENT

- Performance management program that includes 360-degree feedback
- Support from senior colleagues and mentors
- Board and committee positions
- Memberships in professional organizations

### WORK-LIFE BALANCE

- 20–30 vacation days per year
- Flexible schedules
- Hybrid and remote work
- Personal, maternity and parental leaves
- Mental Health Day
- Service time off



Health & Well-Being



Pay & Incentives



Learning & Development



Work-Life Balance

## *Elements of Our People-Centered Culture*

Our colleagues view learning and development as crucial opportunities to stay ahead of emerging trends, gain new and advanced knowledge that enhances our expertise, and help each of us grow in our own careers.

In turn, we support our colleagues' professional growth in many ways, including:

- Lunch and Learn sessions, offered in-person and virtually
- 360-degree annual performance reviews and mid-year check-ins
- Mentoring for first-year employees
- A supervisor or development partner for each employee to provide feedback and guide career goals
- Financial support for professional development opportunities
- Attendance at networking events, conferences, seminars and webinars
- On-the-job opportunities to try new projects and tools

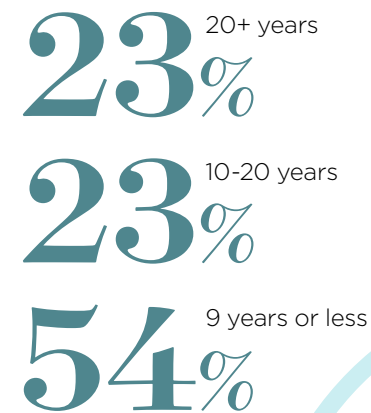
Standing Partnership invests 1,600 hours per year in learning and professional development. All D&E employees are encouraged to explore topics and tools that help do our jobs better, take on stretch projects to prepare for advancement, and participate in external activities that sharpen leadership skills and expand networks.

We are building an enhanced professional development curriculum for our Standing Partnership and Dix & Eaton team members together, which will involve Lunch and Learn topics, coaching and educational sessions on critical topics, and bringing in outside speakers.

### *Growing* **TOGETHER**

Because we provide plenty of opportunities to learn and stretch into new roles, our employees are able to shape their own career paths. Many of us have spent decades together, which further solidifies our shared commitment to each other, our clients and our communities.

\*Includes Dix & Eaton and Standing Partnership colleagues. Data as of November 1, 2024.



### *A Legacy of Leadership Development*

Part of D&E's DNA is a long-standing commitment to developing future leaders, many of whom enroll in professional development programs in our communities. **FOCUS St. Louis** offers professional development programs that combine leadership training with civic education. In recent years, Standing Partnership colleagues Mihaela Grad, Andrea Shea, Lindsay Auer and Julie Steininger have completed the Women in Leadership program, and Melissa Lackey participated in the Leadership St. Louis program.

Similarly, numerous Dix & Eaton colleagues, past and present, have been accepted into various leadership development programs offered through Cleveland Leadership Center. These programs instill crucial characteristics for successful leadership, encourage participants to connect and grow their networks, and enhance their understanding about issues that impact the Northeast Ohio region.

Over the past two years, Angela Almasy and Nicolle Huffman were members of Cleveland Bridge Builders cohorts. Lisa Zone is representing Dix & Eaton as part of Leadership Cleveland's Class of 2025, continuing a tradition of firm colleagues who have participated in this prestigious program.

# supporting learning & development



# furthering our commitments to **DEIB**

**A**t D&E, we strive to cultivate an environment where individuals from all backgrounds feel welcomed, supported and respected. We are dedicated to embedding diversity, equity, inclusion and belonging (DEIB) principles into every aspect of our work.

Our senior leadership and cross-functional DEIB team drive accountability across the business, ensuring that our efforts are connected to our culture and operations. In 2023, we appointed a DEIB Director, who leads our efforts to foster a more inclusive and diverse workplace, track progress and drive positive change.

## *Educating to Enhance Empathy*

We believe in continuous learning and provide numerous opportunities for our colleagues to enhance their DEIB knowledge and skills, including:

- **Instructor-guided sessions** on topics such as gender literacy, identity, multiculturalism, inclusion and diverse professional networks, along with recommended content like the [Trust in Black & White](#) documentary.
- **Biweekly, internal DEIB newsletters** featuring a curated range of articles, videos, podcasts, webinars and resources.
- **Attendance at DEIB conferences** and forums through our affiliations with The Diversity Center of Northeast Ohio, Greater Cleveland Partnership and the *St. Louis Business Journal*.
- **Sharing insights** via social media and blog posts with colleagues and clients, covering topics such as ADA-compliant reporting practices, affinity days and DEIB initiatives.

## Our Areas of Focus

### *Education*

Enhance all colleagues' knowledge and understanding of DEIB in best practices and what DEIB means at D&E.

### *Inclusion*

Create an inclusive environment where everyone can thrive, be their authentic selves and feel safe speaking their truth.

### *Community*

Ensure our workforce reflects our communities where we live and work, as well as the clients with whom we partner.

Through our thought-provoking *DEIB at D&E* newsletter, D&E empowers employees with practical methods, valuable tools and real-world examples to promote inclusive behaviors, navigate candid conversations, embrace cultural awareness and use language that fosters belonging and respect.

## *Building an Inclusive Environment*

As a dynamic team of professionals, we are committed to fostering an inclusive environment where everyone can thrive, be their authentic selves and feel safe speaking their truth. We actively pursue this by:

- Encouraging connection and uniting team members through informal, in-person gatherings and recognition of colleague milestones.
- Hosting hybrid Lunch and Learn sessions, monthly staff updates and State of the Company meetings. All sessions are recorded and accessible afterward.
- Providing access to technology tools that facilitate colleague recognition and information sharing.
- Designing our new Cleveland office, opening in 2025, with a special focus on [meeting or exceeding ADA standards](#).

## *Increasing Our Diversity*

We know that the best ideas come from an environment rich with diverse voices and perspectives, and we are working toward cultivating a workforce that better mirrors the diversity of the communities we serve. Our initiatives include hosting college students for shadow days, which gives them the opportunity to learn about our services, engage with colleagues and explore the communications industry.



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**We’ve identified key elements essential to increasing our staff diversity, such as expanding our team’s collective knowledge and understanding of DEIB and fostering a more inclusive environment where everyone can thrive. I’m honored to do this work and know this is just the beginning as we continue the journey of building a more diverse and inclusive workplace.”**

– Theresa Allen, DIRECTOR OF DEIB AND CONTROLLER

Additionally, we continue to broaden our recruitment network by participating in diverse networking events and utilizing platforms such as the National Association of Black Journalists, National Diversity Council, American Marketing Association’s diversity site and Minority Jobs.

We seek opportunities to support minority-owned businesses and underrepresented entrepreneurs. In 2023, Standing Partnership exceeded its minority-owned investment goal by engaging diverse business partners in our client and internal projects.

While we have only begun tracking our progress, we recognize that building a truly diverse and inclusive workplace is an ongoing journey, and we remain committed to this goal.





# the value we create for clients

Our social impact encompasses the work we do to support our clients and helps them navigate what it means to be a responsible corporate steward and a sustainable, successful business in an evolving legislative, social and civic landscape. Through extensive research, industry connections and ongoing education, we have established ourselves as thought leaders who stay ahead of emerging trends and changes in the marketplace.

We partner with clients to help them grow and communicate their enterprise value. In doing so, we provide strategic counsel on how they can anticipate risks, showcase their fair and safe business practices, and build trust with their employees, customers and investors. Our work encompasses long-form reporting, stakeholder engagement, public relations, change management and crisis communications, investor relations and more.

Additionally, we help our clients drive growth so they can remain strong, successful companies. Through lead generation, content marketing and automation, sales enablement and other growth strategy marketing, we are positioning today's businesses to deliver value for their customers and employees.

## *Sustainability Strategy and Communications*

D&E is a recognized national leader by size and reputation in the sustainability and environmental, social and governance reporting and communications landscape. Each year, our team works with more than 25 organizations to help implement, elevate and communicate their sustainability commitments, including comprehensive reporting. Our clients represent multiple industries, including manufacturing, agriculture, technology and aviation. We provide thought leadership and advise organizations on ways to address critical topics such as climate change and risk, energy efficiency, health and safety, human rights, diversity and inclusion, community engagement, governance

and ethics, and alignment with key reporting frameworks, including the U.N. Global Compact and U.N. Sustainable Development Goals.

We help our clients tell their sustainability stories by partnering with them on:

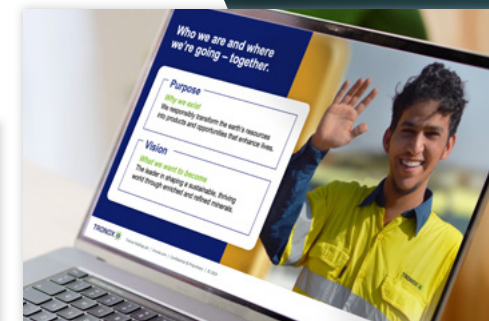
- Competitive and industry research
- Third-party auditing and benchmarking
- Primary or secondary materiality assessments
- Alignment with reporting frameworks (GRI, SASB, TCFD, TNFD, etc.)
- Efficient and collaborative project management
- Compelling content and creative design

Providing insights and helping clients stay ahead of industry trends are key components of our organization. Our team members regularly contribute to [Dix & Eaton's blog](#) and [Standing Partnership's insights](#). In addition, our teams share relevant information and trends via our newsletters related to sustainability, investor relations and marketing.

## *Helping Clients Create Accessible Content*

Two years ago, we began a learning journey to help our clients create documents that are in compliance with the Web Content Accessibility Guidelines and other voluntary standards to enable online accessibility for everyone. In 2023, a working group composed of team members from across the firm began researching and sharing best practices for optimizing content and designing for accessibility.

Today, we continuously seek new resources and updated recommendations to create documents that align with our clients' inclusion initiatives and web accessibility statements. Through the addition of alt tags – adding words that describe images and graphics for people accessing content through a screen reader – and the assurance of proper color contrast and image layers, our optimization work leads to the production of documents that are inclusive of all audiences, no matter how they access the content.



# environmental awareness

**T**oday, managing environmental impacts is an expectation of all types of businesses. As a combined enterprise, we are committed to actively caring for the environment.

D&E offers hybrid and remote work for employees, which cuts down on gas consumption and commute time. Dix & Eaton owns office space in Cleveland and offers colleagues either remote or hybrid work schedule options. Standing Partnership colleagues work fully remote with the option to utilize a leased coworking space in St. Louis, which also keeps resource use low. In addition, we conduct many internal meetings and client check-ins virtually, using technology to reinforce meaningful connections.

Our Cleveland office participates in our building's recycling program with recycle bins in each office, the kitchen space and copy station.

## *Designing a More Sustainable Workplace*

To amplify our commitment to sustainability, we are choosing environmentally conscious materials for the office space that we are renovating, located in the Bulkley Building of Cleveland's Playhouse Square. Our two-story space will feature carpet and luxury vinyl tile flooring, which is recyclable and known for its low embodied carbon footprint. Americans with Disabilities Act (ADA) compliance has been factored into the design of some individual offices, and our office will have a lift system to provide access to the top floor and rooftop outdoor space.

Other environmentally friendly features include EnergyStar appliances, sustainable finishes with recycled content, LED motion lighting and an efficient HVAC system.

In addition, our general contractor has established a goal to employ a workforce with 20% diversity. During the project, at least \$1 million will be awarded to diverse contractors and companies, including women- and Black-owned businesses.

# SHARED

## ownership & governance

**W**e believe in the power of collaboration. Not only is it our foundation as we partner as employee owners to achieve outstanding results for clients, but it also shapes our mindset as we drive growth for our organization.

D&E is a 100% employee-owned firm with an employee stock ownership plan (ESOP). Our ESOP represents an additional financial benefit – employees own stock in the company and directly benefit from the firm's success. As employee owners, we are motivated to take personal accountability for our work and invest in meaningful, lasting relationships with our clients. This ownership mindset is core to our firm's continued success.

### *Shared Governance to Guide Our Growth*

Our executive cabinet includes leaders from both operating groups to ensure collective, informed decision-making. Together, we are working to define our firm's shared values, which will showcase our commitment to collaboration, our ambition to do good work for our clients and the value of employee ownership.

D&E also values outside expertise. We are governed by a Board of Directors that is chaired by our CEO and consists of several independent directors from various industries.

As we continue to integrate, we have organized cross-functional, inclusive teams to focus on key areas for the enterprise: client service excellence, business development, marketing, talent management, tools/technology/AI and financial operations. These groups set goals and meet regularly to strategize and ensure we are making progress on key elements of our business.

### Governance by the Numbers

60% of our executive cabinet is female

average tenure of our executive cabinet 24 years



# our impact in action

> In June 2024, team members from Dix & Eaton participated in Race for the Place – a 5K and 1-mile walk to support The Gathering Place, a resource center in Northeast Ohio that supports individuals and families who are facing cancer. The team also raised more than \$1,000 in donations. Way to go, **Team D&E in CLE!**



> **Melissa Lackey's** YMCA story goes back to high school, where she worked as a camp counselor. Then, her children played YMCA sports and learned sportsmanship and teamwork. Melissa has been on the board for the Gateway Region YMCA for more than 10 years, including a recent stint as board chair. Within the past year, **Gateway Region YMCA** partnered with Affinia Healthcare to build a facility with medical, dental and behavioral health services that is adjacent to a YMCA in North St. Louis County. In addition, the organization recently opened an inclusive youth sports complex in partnership with the Miracle League and the St. Louis Cardinals. "This organization is so much more than a gym," says Melissa. "The YMCA focuses on building healthier, inclusive communities, bringing people together and nurturing each individual's potential."

> **Sam Pekarse's** involvement with **Woodland Pattern** – a literary arts nonprofit that was founded in 1979 by poets and artists in Milwaukee, Wisconsin – began as an English major in college. Sam has been on Woodland Pattern's board for seven years and served as vice chair for the past three years. In addition to guiding the organization's strategic decisions and providing for staff, volunteers and community members, Sam has hosted workshops, filmed a documentary series and attended programs. "There is something for everyone at Woodland Pattern and it's a place that extends far beyond poetry and art," says Sam. "The space is a haven for LGBTQ+ arts, a place for people of all ages to participate in community activities and an organization determined to further arts education for youth."



> **Margo Balinski** began teaching Sunday School at **Concord Trinity United Methodist Church (CTUMC)** St. Louis – where she was baptized as an infant – two years ago to carry forward her previous career as a teacher and to honor the memory of her mom, who held kids' ministry dear to her heart. Margo prepares lessons and activities for children in grades pre-K to 5, and also participates in holiday-themed events sponsored by the church. "The goal of all activities at CTUMC, including Sunday School, is to show kids and families a positive environment in the community and share kindness and love in a fun and inclusive way," says Margo.

> **Kaitlin Kelly** became connected with **Helping Hand-Me-Downs (HHMD)**, an organization that enhances the quality of life for children and families in the St. Louis area, through her mom and her friend Byron. Kaitlin's mom is a job coach for adults with Down syndrome, which is how she met Byron. They volunteer at HHMD twice a week – and got Kaitlin, who is now president of HHMD's board, involved as well. HHMD first meets the immediate needs of children and families referred in (including clothing, seasonal coats, or jackets and socks) and then connects them with life-changing resources that foster independence. About HHMD, Kaitlin says, "Not only does this organization help get St. Louis families back on their feet, it also gives adults with Down syndrome a safe space to give back."



# our impact in action

➤ **Connie Harrington** joined the support community of the **Murder-Suicide Loss Network (MSLN)** after experiencing a loss and felt enriched and strengthened by hearing others' stories. She wanted to help the virtual organization expand its presence and began to volunteer. Connie now works with MSL survivors, co-facilitates support meetings and manages most of the organization's marketing. She serves as board secretary and contributes to community advocacy efforts, including partnering with clinicians and other experts to build awareness and develop research-based resources. "The grief after MSL is complicated and long-lasting – but it's possible to move forward," says Connie. "Our hope at MSLN is that survivors gain a tool, resource or connection to help them grieve, cope and heal."



➤ **Sarah Hihn** found in **FrontLine Service** an organization with a mission around two topics she is passionate about: homelessness and mental health. FrontLine serves some of Northeast Ohio's most vulnerable populations, including individuals experiencing homelessness or navigating traumatic life events, as well as individuals who have witnessed or experienced violence. "These are often groups who have little to no resources and benefit greatly from FrontLine's services," says Sarah. As part of her work with FrontLine, Sarah is a member of both the board and the governance committee, participates in fundraising and volunteers at the organization's annual Twinkle Shop.

➤ The six years that **Lindsay Auer** has spent supporting **YWCA Metro St. Louis** have included communications work, leadership roles on their volunteer committee and a position on the board of directors. Many clients who seek YWCA Metro St. Louis' services face unimaginable barriers every day, including violence, racism and economic barriers. The organization provides critical wraparound services to women and children in Lindsay's region at no charge, moving them past times of crisis and onto a path of safety, healing and self-sufficiency. "Families deserve the path to a better future – a safe place to sleep, a healthy meal on the table, a career that pays well and a quality education for their child or children. YWCA Metro St. Louis provides these resources and empowers women to earn a family wage and afford their own home," says Lindsay.



➤ For the past year, **Meg Kramer** has volunteered as a tutor with **Literacy Volunteers of Morris County (LVMC)**. The organization provides free tutoring to adult language learners, and Meg signed up to volunteer as a way to get involved in her new community after a recent move to New Jersey. Now, she tutors two students and prepares lesson plans for their weekly sessions. "Not knowing the primary language of the place where you live can be isolating," says Meg. "I hope that my work with LVMC helps students feel welcomed and included in our shared community."



# our impact in action

➤ **Nicolle Huffman** has supported **Ronald McDonald House Charities** (RMHC) of Northeast Ohio for nearly 14 years – beginning with an internship in college. The organization’s focus on keeping families together during challenging times is meaningful to her, and she has volunteered for multiple events over the years. She currently serves on the board’s marketing communications committee and is a member of the Emerging Leaders group. “The House provides so many resources for families, from a warm meal at the House, to the Family Room at hospitals, to resources through the RedTreehouse,” says Nicolle. “Hearing stories from families who received support makes me really proud to volunteer with RMHC.”



➤ **Jake Watroba** began volunteering with the **Allison Rose Foundation** (ARF) when it was created in 2018 and became more involved as the organization grew and developed. ARF is dedicated to changing the lives of food allergy families through education, awareness, research and advocacy. ARF provides training for staff and students at local high schools, restaurants and municipalities, including how to properly administer various epinephrine auto-injectors. Jake is now a member of the organization’s young professionals board and volunteers at annual events like ARF’s Par-Tee golf outing and Yellow Brick Road celebration. “Watching ARF grow from having a small presence at a local high school to bringing education and awareness into other schools and restaurants – and beyond to states outside Ohio – has been astounding,” says Jake. “Their advocacy and training around food allergies are important for children and families.”

➤ The work of **DigitalC**, a nonprofit technology social enterprise dedicated to bridging the digital divide in Cleveland, has been a passion project of **Chas Withers** for more than 15 years – and this project has morphed through several iterations. Chas is a member of DigitalC’s board and has witnessed a complete breakthrough over the past two years as the organization has expanded internet access across the city, creating digital literacy and equity especially among audiences most in need. Within the past year, the organization was awarded a major grant by the city of Cleveland and received support from multiple levels, including Cuyahoga County, the State of Ohio, the federal government and the Mandel Foundation. “DigitalC has extended the digital canopy and built more than 40 towers to improve the digital connectedness of our city,” says Chas. “Ensuring access connects individuals to healthcare, jobs, literacy and even social networking. If you do the work the right way, as the organization really has, the legacy impact is inestimable.”



➤ The **Missouri Botanical Garden** is an institution in St. Louis, and **Julie Steininger** has been involved with the organization since 2013. She joined the Corporate Council to serve as an ambassador for the Garden’s mission, and spent three years as chair of the Corporate Outreach and Engagement Committee. “The Missouri Botanical Garden is all about education, and as an ambassador, I can help my Standing Partnership colleagues, other regional businesses and the St. Louis community learn about plants and their environment,” says Julie. “Additionally, the Garden’s beautiful locations (including the Butterfly House and Shaw Nature Reserve) and efforts around conservation and green living resonate with a broad audience interested in sustainable living.”



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