



2023 ESG Report

Table of Contents

1.....	A Message from our CEO
2.....	MyPath's Year in Review
4.....	Environment
5.....	GHG Reporting
5.....	ENERGY STAR Portfolio Manager
6.....	Energy Efficiency
7.....	Green and Healthy Schools
8.....	Social
9.....	Owner Dignity Process
9.....	Month of Giving
10.....	Changing in Purchasing
10.....	Purchasing Change – Amazon
11.....	Pathfinders
11.....	Owner Experience
12.....	Communication
12.....	Training and Development
13.....	Stakeholder Code of Conduct

14.....	Governance
15.....	Principal Risks
16.....	SDG Goals
21.....	Looking Ahead
21.....	GRI Reporting



A message from our CEO



Dear MyPath Community,

At MyPath, we are deeply committed to making meaningful and measurable progress on our Environmental, Social, and Governance (ESG) initiatives. I am pleased to share our 2023 ESG Report.

Our mission is to transform lives: the lives of the individuals we support, and those of our employee-owners. We adhere to several key Beliefs and Behaviors: Passion, Accountability, Teamwork, Openness, and Continuous Learning and Innovation. MyPath's ESG initiatives are firmly embedded in these core values. And as an employee-owned organization, we are committed to improving the lives of the individuals we serve, the employee-owners who provide those services, and the communities where we live and work.

In 2023, we continued to make progress in ESG, with a special focus on developing metrics and measures. In the Environmental area, we took steps to continue to measure the environmental impact of more than 100 program locations throughout Wisconsin and Indiana. We were able to enlist the individuals we serve in efforts to improve their environment, for example, by planting trees to enhance landscapes. A focus on our vehicle fleet was to reduce the amount of time spent in unnecessary idling, which wastes gas, harms vehicles, and impairs the environment.

MyPath also renewed its commitment to Social goals. Welcoming a diverse set of voices allows us to achieve better mission and business outcomes. In 2023, the representation of BIPOC individuals among leaders of company operations doubled from 12% to 25%. Our Owner Resources Groups, Pathfinders, expanded their efforts to encourage every employee-owner's voice to be heard. And we have used technology to invest in our employee-owners. For example, as part of our implementation of Workday, we rolled out Workday Learning, allowing employee-owners to access training on a variety of DEI and other topics using their mobile devices. This included training on the Owner Dignity Process, where we offer means to protect employee-owners from the trauma that can be caused by racial slurs.

In the Governance area, we are supported by a strong board of directors that represents and values diverse views. In 2023, we rolled out MyPath's first Stakeholder Code of Conduct, laying out expectations for interactions with every group with whom we interact. We also created a Compliance Committee to promote a culture in which MyPath follows the rules and regulations that govern its business.

At MyPath, we take pride in breaking boundaries—boundaries of what others say is possible. We welcome your review of the 2023 activities that moved the needle in ESG. Thank you for supporting MyPath as we join the thousands of organizations that have expressed their dedication to support the communities that allow us to thrive. On behalf of 2,000 Owners Who Care, we thank you!

A handwritten signature in blue ink, which appears to read "Terry Leahy".

Terry Leahy

Year in Review Spotlight

► Impede the Idle

As a community-based human services organization, our environmental footprint derives from the buildings where we locate our programs and from our transportation fleet. In 2023, we used fleet management software to gain insight into the driving habits throughout the company. We discovered something common to vehicle fleets everywhere: excessive idling. Whether the idling happens to bring the car to a comfortable temperature or occurs while waiting outside the doctor's office, idling is a fact of life in vehicle fleet use. It can serve a valid business purpose, but at the cost of damaging vehicles and wasting fuel.

According to the [EPA](#), idling causes twice the wear on internal parts of an engine when compared to driving at regular speeds. And the [US Department of Energy](#) estimates that 6 billion gallons of fuel are wasted annually through the idling of light and heavy-duty vehicles. In our initial review of data from the MyPath fleet,

we discovered that for every 24 hours of drive time, our vehicles idled for nearly 8 hours! Here was something we could measure and address.

In April 2023, MyPath kicked off its first companywide environmental initiative: Impede the Idle. The goal was to reduce instances of "Long Idles," which we defined as idles of more than 30 minutes. We recognized that in the human services business there may be good reasons for idling vehicles. For example, we transport some of the people we serve in wheelchair vans. It can take significant time to load and unload individuals in wheelchairs, thereby requiring the vehicle to idle to maintain a comfortable temperature for those still in the vehicle.

We determined that 30 minutes should be adequate time to address this and similar needs, but idles over 30 minutes would be reviewed by each company and vehicle manager.

Our final numbers for 2023 were:

- 174 vehicles measured,



- 7,792 instances of idling over 30 minutes, and
- 6,344 total hours idled.
- 4 Highest Months: January, March, February, and December.
- 4 Lowest Months: September, July, August, and October.

In 2024, these numbers will be reviewed to determine appropriate goals for each vehicle depending on how it is used. As we track our GHG emissions data, these goals will flow into overall carbon reduction goals for MyPath in 2024!

Year in Review

► Measurement and Growth

2023 was MyPath's first year of a holistic ESG program, adding Environmental programs and metrics to our existing programs and metrics for Social and Governance.

For Environmental metrics, it was a year of creating systems and measuring what data we have. As a dispersed and varied company, MyPath systems run the gamut from companywide, such as fleet management software, to site specific, such as energy and gas bills. The 2022 MyPath ESG report was the first time we measured emissions for the company and the first time usage was seen companywide. Yet companywide data, while useful for reporting, is too broad to utilize for environmental initiatives. These initiatives are at the site or vehicle level; whether that is comparing utility usage year over year or comparing against Energy Star norms, the work happens in the details for environmental reporting. In 2023, it was a year of data discovery and the creation of systems to measure and implement change where possible and necessary.

For Social metrics, 2023 was a year of continued growth from a strong foundation. MyPath Pathfinder groups (our Employee Resource Groups) continued to take root and drive a stronger community within MyPath while also looking outward. Examples of that abound, whether for the Generations Pathfinders 5K challenge in Aduro (our wellness software), or for the Month of Giving project run by the Mental Health Pathfinders. Additionally, in 2023, we took the first step in creating purchasing systems to ensure our spending aligned with the MyPath DEI and Environmental Commitments. We believe a company of MyPath's size, one that is so embedded in our local communities, can have a distinct impact on our purchasing ecosystem.

For Governance metrics, we are expanding our discussion of both governance and risk. As a 100%



employee-owned company, some aspects of governance are dictated by federal agencies like the IRS and the Department of Labor. Beyond those, MyPath has internal governance goals. For example, we are taking steps to create a Board of Directors

with a diverse set of skills and experiences. Another governance topic this year focuses on principal risks. Every organization, depending on industry, has its own set of risks unique to that company. Some risks, however, are nearly universal for modern companies and can be compared across industries. This year we focus on two such risks that are making headlines: cyber security and property insurance.

Taken together, our first year of a complete ESG program shows great strides both in measurement and achievement. The information on the following pages shows how our company lives up to the standards we set for ourselves, and how we plan to evolve in the future. Enjoy!

Environmental Spotlight

► Farm to (School) Kitchen

Farm to School programs support the distribution of fresh, local produce to schools to allow students to have access to nutritious and healthy food. Preliminary results show that such programs positively influence student's knowledge of food and nutrition. Most studies also suggest these programs promote healthy food selection, nutrition self-efficacy, and greater willingness to try fruits and vegetables. ([NIH](#)) At Genesee Lake School, the evolution of the relationship between Homegrown Farms and the GLS Kitchen has been remarkable. The two areas work hand in hand to ensure the students and employee-owners of GLS have access to as much fresh, hyper-local produce as possible.

The work for this partnership begins the fall before the growing season and continues throughout the year. Some of the steps include:

- The Nutrition Services Coordinator (NSC) provides farm staff with the quantities needed for each meal service and how many pounds of each crop they can take per week.
- Farm staff create detailed crop plans, listing the weekly harvest estimate for the entire harvest season.
- The NSC takes this information and creates menus to optimally use farm produce while still adhering to National School Nutrition guidelines and Nutrition Services features such as Around the World in 80 Trays. ([WI DPI](#))



Homegrown Farms produces roughly 20,000 lbs. of fresh produce per year. For crops that can be grown year round in our aquaponics system the savings are substantial. We estimate savings of roughly \$450 per month in

lettuce costs alone. When our fields are producing, the system becomes so efficient often Nutrition Services purchases no outside vegetables during the summer months. During the harvest season, GLS saves an

average of 50% in produce costs, over \$6000 per year.

None of this would be possible without the dedication of the Nutrition Services department and the employee-owners who make it work. Donna, James, Jean, Joanne, Thomas, Anna, and Erika have an average tenure of nearly 7 years with GLS. They know the students and they know the staff, and they work hard to ensure everyone is well fed and properly nourished.

The farm-to-cafeteria model fosters seasonality in food menus, provides students with better quality, and dramatically reduces food costs, while supporting sound environmental practices and helping to teach about [plant rich diets](#).

Environment

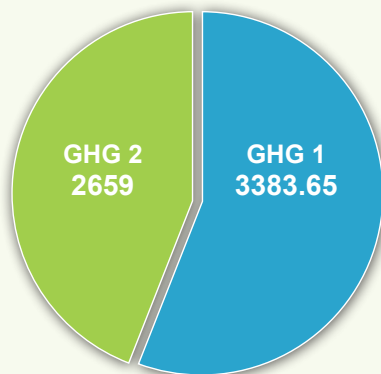
► GHG Reporting

- GHG 1: Gasoline/Diesel and Natural Gas
 - According to [EPA Emission Factors Hub](#) and LeasePlan fuel usage, our transportation fleet emitted 1,325.65 metric tons of CO2 equivalent.
 - According to the [EPA Greenhouse Gas Equivalencies Calculator](#), by using natural gas at program locations, we emitted 2058 metric tons of CO2 equivalent.
- GHG 2: Electricity
 - According to the [EPA Greenhouse Gas Equivalencies Calculator](#), by using electricity at program locations, we emitted 2,655 metric tons of CO2 equivalent.
- In MyPath's 2022 report, we relied on data from Azuga, one of our fleet management programs, based on mileage driven. In this 2023 report, we are reporting emissions data generated from overall fuel usage

from LeasePlan as we believe this is a more accurate representation of fleet emissions.

- Because MyPath has opened and closed programs, and changed the number and type of vehicles, 2023 emissions numbers are not comparable to those from 2022. For 2024, we are evaluating an energy use metric that will support year-over-year comparisons.

Metric Tons CO2 Equivalent



► ENERGY STAR Portfolio Manager

- In 2023, MyPath began using ENERGY STAR Portfolio Manager, an online resource that allows us to benchmark energy usage depending on building type.
 - Portfolio Manager is the industry-leading tool for commercial energy benchmarking, with 25% of the market in the US. It is also the national benchmarking tool in Canada.
 - Portfolio Manager not only allows us to compare our buildings to ENERGY STAR standards, but also offers access to training opportunities on how to effectively manage the physical plant.
 - For buildings that score high enough, we can apply for ENERGY STAR Certification, a third-party system that recognizes building efficiency.
 - Compared to its peers, an ENERGY STAR certified office building:
 - Uses 35% less energy



- Generates 35% fewer greenhouse gas emissions
- Costs \$0.54 less per square foot to operate
- Has higher occupancy rates
- While we have not yet pursued certification, we began to evaluate buildings across the company and were pleased to discover that some scored very highly on the ENERGY STAR rating scale. The highest performer was the headquarters for Homes for Independent Living in Green Bay, Wisconsin, which scored an incredible 95 out of 100 in energy efficiency!

Environment

► Energy Efficiency

With the variety of building types in the MyPath portfolio, energy efficiency can have an outsized impact on energy bills and emissions. During 2023, MyPath updated equipment in a variety of settings. Below are three examples:

- Paragon Community Services installed a Payne PA5S Energy Star Certified Air Conditioning unit at its Plymouth program location. This unit is rated at 16 SEER (Seasonal Energy Efficiency Rating), a standard efficiency rating for Air Conditioners, and replaces an older



13 SEER unit. Moving from SEER 13 to 16 is projected to save 29% per year on energy costs through higher efficiency.

- In 2023, Genesee Lake School installed two additional Navien High-Efficiency Condensing Heating boilers, bringing our total to four. These boilers are Energy Star certified and have 97.5% Thermal Efficiency, placing them near the top in efficiency standards with a lower emissions output.
- T.C. Harris installed new roofing over the dining and laundry areas,

which included additional R-15 insulation. R-Value is a measure of insulation's ability to resist heat traveling through it. The higher the R-Value, the better the thermal performance of the insulation. T.C. Harris now has a total insulation rate of R-33 in these areas, which exceeds building standards in Lafayette, Indiana. This will require less heating and less cooling to keep these critical spaces comfortable for staff and students.



With these changes come opportunities for measurement. Following installation, we will measure actual energy use reductions versus projections and will use this information to inform decisions on future projects.

Environment

► Green and Healthy Schools



Green and Healthy Schools stems from a partnership between Wisconsin's Department of Public Instruction and Department of Natural Resources to catalyze a culture of sustainability and wellness in all Wisconsin schools. Every year schools in Wisconsin can fill out a survey built on three goals aligned with the U.S. Department of Education Green Ribbon Schools:

- Reduce environmental impacts and costs,
- Improve health and wellness, and
- Increase environmental literacy.

In 2023, for the first time two MyPath schools, The Richardson School—Madison and Genesee Lake School, submitted a survey measuring their

achievements on these three goals.

MyPath is extremely proud that both schools received Sapling recognition, the 2nd highest of the 4 achievement levels! This recognition shows the commitment of these two schools toward sustainability and wellness for both students and staff. Moving forward, all MyPath



schools will use the knowledge and resources gained from this process to achieve the goals of the Green and Healthy Schools program. Our goal is for all Wisconsin MyPath Schools to achieve Sugar Maple School recognition, the highest

recognition level and the threshold for eligibility for nomination for the U.S. Department of Education Green Ribbon Schools program.

Social Spotlight

► Human Rights Campaign – All Children, All Families Certification

Beginning in 2022, affirming MyPath's commitment to create a welcoming environment for the children we serve, we embarked on a pilot project with the Human Rights Campaign (HRC) and its All Children – All Families (ACAF) certification. This program promotes LGBTQ+ inclusive policies and affirming practices among child welfare agencies, and celebrates those agencies that are leading the field with innovative approaches to inclusion.

At MyPath, we began by creating a team of employee-owners to complete a self-assessment based on ACAF benchmarks. We used the results of the self-assessment to design more inclusive policies and practices. Following the self-assessment process, we implemented a MyPath-wide training initiative from July through September of 2023 in which 86% of MyPath employee-owners learned about how to create a welcoming and affirming environment for the individuals we serve.

ACAF-participating agencies receive a designation in one of three Tiers of Recognition, depending on the extent to which they have implemented the ACAF Benchmarks of LGBTQ+ Inclusion. We are pleased that HRC formally recognized that MyPath earned a Tier 1 out of a 3-Tier process. Tier 1 is Building Foundation for Inclusion. At this level, benchmarks focus on establishing nondiscrimination protections, providing staff with online learning related to LGBTQ+ topics, and improving LGBTQ+ inclusion in forms, paperwork, and messaging. We will continue to embed inclusive practices throughout MyPath as we seek to maintain this status.



Social

Social issues remain fundamental to MyPath. In 2023, we launched several initiatives to strengthen the social fabric for our colleagues and those we serve.

► Owner Dignity Process

2023 saw the release of the Owner Dignity Process training across MyPath. This initiative began at a meeting of our Race and Ethnicity Pathfinders Group wherein one of our colleagues shared their experience of being subjected to racial slurs by individuals we serve. From this discussion a team was formed to create a process in which to help individuals at MyPath gain a more holistic understanding of what it means to respect the dignity of each individual.

The MyPath Owner Dignity Process is a resource that offers guidance on how to promote a dignified culture of support, safety, and inclusion for employee-owners who experience verbal discrimination and psychological harm, as well as their colleagues and supervisors.

For example, these incidents require a response that includes cross-team collaborations to provide appropriate redirection for the person causing harm. This process provides a level of heightened awareness, a framework for how to provide support and be in alliance with the person experiencing the discriminatory behavior, and method to shift the conversation to safety, inclusion, and belonging for employee-owners and the person served.

The Owner Dignity Process training is the result of these efforts. It is now a required training for all employee-owners.

► Month Of Giving

A variety of studies has shown that charitable giving and sharing gratitude are good for mental wellbeing. In November and December of 2023, the Mental Health Pathfinders Group, one of MyPath's seven employee resource groups, convened the inaugural MyPath Month of Giving. During this month, MyPath employee-owners were encouraged to donate money, time, or items to a charity of their choosing in their home communities. Staff were invited to get involved individually, or in groups. At the end of the program, the group tallied and celebrated the results:



- ✓ 31 Charities Chosen
- ✓ 1,800 Items Donated
- ✓ 2,670 Dollars Donated

► Changes In Purchasing

The purchasing function at MyPath is dispersed across a variety of layers within the company. Because settings are diverse in location and size, there is no single method to secure the goods and services we need to operate. Larger MyPath settings can take advantage of economies of scale by purchasing through our GPO (Group Purchasing Organization). Smaller program locations rely on local community vendors or use MyPath's Amazon Business account.

MyPath is moving toward purchasing policies that align with the company's DEI and Environmental commitments. Through these changes, we seek ways to direct dollars to organizations that share these goals.

In the fourth quarter of 2023, MyPath introduced screens in its Amazon Business Prime account that afford preference to suppliers and products that meet DEI and Environmental

criteria. These screens elevate preferred suppliers and products to the top of search results so that MyPath employees are empowered to make purchases that align with company values. In addition, these preferred suppliers and products are marked as "Organization Preferred".

In 2023, these screens triggered a 185% increase in purchases with preferred vendors compared to the fourth quarter of 2022, driving an additional \$27,828 toward preferred vendors and products. In 2024, we will continue to work to inform employees throughout the company about the importance of favoring products and suppliers that promote our DEI and Environmental commitments.

► Purchasing change – Amazon

2022 Q4 Amazon	Purchases	Percentage
Small Business	332	10.72%
Minority Owned	18	0.58%
Veteran Owned	3	0.10%
Woman Owned	3	0.10%
Climate Pledge Certified	96	3.10%
Total Overall Purchases	3098	
Percentage of Purchases with Preferred Vendors		14.59%
Total Dollars Overall	\$102,673.69	
Total Dollars to Preferred Vendors	\$14,980.15	

2023 Q4 Amazon	Purchases	Percentage
Small Business	803	21.48%
Minority Owned	181	4.84%
Veteran Owned	16	0.43%
Woman Owned	52	1.39%
Climate Pledge Certified	281	7.52%
Total Overall Purchases	3739	
Percentage of Purchases with Preferred Vendors		35.65%
Total Dollars Overall	\$120,075.75	
Total Dollars to preferred vendors	\$42,808.50	

Year Over Year Change

Increase in percentage of purchases with preferred vendors	185%
Increase in actual dollars spent with preferred vendors	\$27,828.35
Increase in dollars spent with spending held constant at 2022 level	\$21,624.30

Social

► Pathfinders

In 2023, our Owner Resource Groups, Pathfinders, continued to offer employee-owners opportunities to explore their passions and share their voices in ways that contributed to a healthy work environment.

General Pathfinder Statistics for 2023

✓ 918 meetings in 2023 ✓ 7 Pathfinder Groups ✓ 140 individual employee-owners attended

Pathfinder Group Achievements

Influenced policy and procedure to advance and elevate issues related to: inclusive benefits, Owner Dignity, safe spaces for breastfeeding mothers, gender-neutral bathrooms, recognizing and supporting the mental health needs of colleagues, and many more.

New Trainings

3 DEI related trainings were added to Workday Learning with over 80% completion.

Spreading the word

The MyPath Director of DEI and others (including the MyPath CEO and Director of Marketing and Communications) presented at 9 external conferences and meetings.

Benefit Offerings

Medical

- Medical, Dental, Vision Insurance
- Pharmacy Programs
- Life and Disability Insurance

Wellness

- MyVoyage – Aduro Wellness Plan (with discounts available for medical insurance costs)

Level	# of employee-owners completed
1 (smallest discount)	140
2	33
3 (largest discount)	169
Points achieved, but no level awarded	112

- 61% Engagement
- In addition, in our health plan:
 - 353 Human Performance Assessments were completed,
 - 211 Biometric Screenings were submitted, and
 - 270 Coaching Sessions were conducted.
 - Each of these offerings helped our employee-owners to proactively address health issues.
- Employee Assistance Program
- Paid Time Off
- Guardian Angel Program
- Five Wishes
- Financial
 - 401K with Match
 - Company-funded contributions to the Employee Stock Ownership plan
 - Employee discount program
 - Student Loan pay down
 - Tuition Assistance
 - Flexible Spending Account

► Owner Experience

MyPath is a company of people who care for people. We rely on the passion, ingenuity, and effort of each of our employee-owners daily to promote quality in the services we provide for some of the most vulnerable individuals in our society. To provide that care, employee-owners must know MyPath cares for them. We demonstrate this through a broad menu of benefits, transparent communications, and robust learning systems.

Social

► Communication

Throughout the year MyPath employee-owners enjoy regular opportunities to learn about everything from the strategic direction of the company to events at local program locations.

Keeping employee-owners informed

- Monthly MyPath Agile Calls
- Workrede App Communications
- MyPath Speakers Bureau
- ESOP Communications
- Company Newsletters
- Pathfinders Group
- Leadership Retreat
- ESOP Retreat



► Training And Development

In 2023, MyPath's learning management system converted to Workday Learning. This change allowed for a far more robust offering of both required and developmental trainings for individuals throughout the company. MyPath's future is only as bright as that of our current and future leaders, and our workforce and leadership development programs are designed with that in mind.

Workday Learning 2023

- 17,599 enrollments
- 14,946 completions
- 175 blended courses created (courses with both digital and in-person components)
- 107 digital courses created (all online/on-demand courses)
- 21 programs created (a grouping of related courses)
- 18 independent lessons created (a piece of media/content that might be a stand-alone job aid, etc.)
- 1,366 blended course offerings (individual sessions scheduled)



Governance Spotlight

► Stakeholder Code of Conduct

Remember upon the conduct of each depends the fate of all.

– *Alexander the Great*

Conviction is worthless unless it is converted into conduct.

– *Thomas Carlyle*

A reputation for a thousand years may depend upon the conduct of a single moment.

– *Ernest Bramah*

As the quotes above represent, conduct matters. How MyPath employee-owners conduct themselves each day determines the fate and ultimate success of our company. Beyond this, the conduct of external stakeholders we depend on – such as families, guardians, funders, and Board members – also collectively reflects on MyPath.

In March 2023 the Board of Directors approved the MyPath Stakeholder Code of Conduct. This was the fruition of a long process of discussion among both internal and external stakeholders.

The essence of the Code is this: Every person, family, or entity that engages with MyPath is expected to demonstrate inclusive, equitable, and respectful behaviors in every interaction.

MyPath is founded on the belief that each individual has the right to receive equitable treatment under law and within their community. This code manifests that belief by prescribing expectations for the tens of thousands of interactions that take place among the MyPath community of stakeholders each day.

A description of the MyPath Code of Conduct is found on our [website](#).

Governance

► Governance Guidelines

As a 100% employee owned company, MyPath is subject to regulation by the IRS and the Department of Labor. Our Board of Directors follows governance guidelines to support the exercise of its duties, and to inform our employee-owners how the Company is managed.

- **Board of Directors.** The business of MyPath is conducted by its employee-owners, leaders, and officers, under the direction of the Chief Executive Officer and the oversight of the Board of Directors, to enable MyPath to pursue its mission: We Transform Lives. The Board is responsible for the overall corporate governance of MyPath, including overseeing strategic direction, reviewing goals created by management, and monitoring progress against these goals. The Board of Directors regularly reviews reports by management on MyPath's performance, prospects, and short-term and long-term issues.

- **Board Nomination and Selection.** Directors are elected at regular intervals by the ESOP Trustee as the sole shareholder of the Company. The Board proposes to the Trustee a slate of nominees for election or re-election. Directors are expected to bring to the role a broad range of experience at policy-making levels in business, finance, long-term care, education, human services, and in other relevant areas. Over time, MyPath seeks Board candidates that reflect diversity by age, gender, race and ethnicity, and experience. A more diverse Board of Directors reflects our employee-owners and those we serve.

Organizations led by a diverse group of directors, research has shown, are more likely to demonstrate stronger financial performance compared to those with less diversity. According to [McKinsey](#), companies in the top quartile for board-gender diversity are 27 percent more likely to outperform



financially than those in the bottom quartile. Similarly, companies in the top quartile for ethnically diverse boards are 13 percent more likely to outperform than those in the bottom quartile. *25% of the MyPath Board of Directors are members of the BIPOC community.*

- **ESOP Trustee.** The ESOP Trustee is selected by the Board of Directors to represent the interests of the ESOP shareholders. By law, the Trustee has a fiduciary obligation to serve the shareholders, meaning that he or she must act in their best interests.

All MyPath employee-owners have access to a company created Certified Employee Owner (CEO) video series reviewing the major aspects of employee-ownership. The final section of this series is dedicated specifically to explaining how MyPath is governed. This understanding is critical if we are to receive the full benefits of employee ownership.

Governance

► Principal Risks

Cyber

According to a Cybersecurity Ventures report, in 2023 the cost of cybercrime hit \$8 trillion dollars. The [IBM Cost of a Data Breach Report](#) explains:

“Healthcare continues to experience the highest data breach costs of all industries, increasing from USD 10.10 million in 2022 to USD 10.93 million in 2023—an increase of 8.2%. Over the past three years, the average cost of a data breach in healthcare has grown 53.3%...”

MyPath has addressed this risk by working to increase cyber security protections and to increase the knowledge base of our employees around potential cyber security issues.

Property Damage and Insurance

The Midwest had been long thought to be safe from headline-grabbing natural disasters such as hurricanes on the coasts and wildfires in the west. However, this part of the country is not immune from climate

issues. For our states, storms with heavy rainfall, wind, and hail are causing substantial property damage, triggering significant increases in insurance premiums. In some situations, the extent of the damage and the increase in construction and repair costs are rendering property insurance unprofitable.

- In Wisconsin, according to [S&P Global](#), homeowners faced an average of a 12.3% increase in property insurance premiums, close to the 11.8% incurred by MyPath in 2023. According to our insurance adviser, the top two forces driving the property rate increase are thunderstorms and climate change.
- A significant ratio in the insurance industry is the direct incurred loss and DCCE (defense cost and containment expense) ratio, which measures claims, including reserves, plus costs such as of legal expenses, such as lawyer's fees, court costs, and paying



for experts and investigators. In 2022, the Midwest had some of the highest ratios in the country, with [Wisconsin at a higher ratio than 44 states and the property insurance market operating at a loss](#).

- A common practice in states where insurance coverage is becoming more difficult to obtain is to offer a state insurance plan. These are typically the choice of last resort due to restrictions and eligibility requirements.

- In Wisconsin, the WIP (Wisconsin Insurance Plan) is very restrictive in its offerings, only available to Dwelling Units with a value of less than \$350k and Commercial Property with building and property with a value of less than \$500k.
- In Indiana, the FAIR Plan is also restrictive, only available to Dwelling units with a value of less than \$250K for building and contents and Commercial units with a value of less than \$1 MM for building and contents.

While higher premiums are a current reality for MyPath, neither Wisconsin nor Indiana is currently in the state of crisis that exists elsewhere. In 2023, we had no property damage insurance claims. In both 2022 and 2021 however, MyPath buildings had significant claims for hail damage. As a company with substantial property holdings that are integral to our mission, this risk is one that we are managing closely.

SDG Goals

► SDG 5 – Achieve gender equality and empower all women and girls

SDG 5 continues to be a material topic because the majority of our employee-owners are women. While this goal is critical for society, it directly relates to our workforce. [McKinsey](#) research has consistently shown that diverse executive management teams outperform those that are not diverse. In 2023, companies in the top quartile of gender representation were 39% more likely to outperform the bottom quartile. This advantage has increased from 15% in 2015. As noted below, MyPath is in a unique position to benefit from this opportunity.



1. Target 5.5 – Ensure women’s full and effective participation and equal opportunities for leadership at all levels of decision-making in political, economic and public life.
 - a. 71% of our company managers identify as women.

- b. 71% of our company executives identify as women.
 - c. 50% of members of the Executive Team identify as women.
 - d. 86% of the Executive Directors of MyPath Operating Companies identify as women.
 - e. 12% (1) of our board of directors identifies as a woman.
 - f. Our professional development program participation reflects the gender identity of the company as a whole.
2. Target 5.a – Undertake reforms to give women equal rights to economic resources, as well as access to ownership and control over land and other forms of property, financial services, inheritance and natural resources, in accordance with national laws.
 - a. 73% of MyPath employee-owners identify as women.

3. Target 5.c – Adopt and strengthen sound policies and enforceable legislation for the promotion of gender equality and the empowerment of all women and girls at all levels.
 - a. Our health insurance covers the specific needs of women and has coverage of transgender-inclusive healthcare.
 - b. We have a policy that addresses equal pay for work of equal value.



SDG Goals

► SDG 10 – Reduce Inequality Within and Among Countries.

SDG 10 continues as a material topic because it is fundamental to MyPath. MyPath exists to support individuals with developmental disabilities and mental health issues, two groups disproportionately affected by inequality. According to the report “[Financial Inequality](#)” by the National Disability Institute, the “poverty rate for adults with disabilities is more than twice the rate of adults with no disability”. This is further exacerbated when groups are analyzed by race: People of color with disabilities seem to face double marginalization, discrimination and stigma that lead to poor socioeconomic outcomes. Even when adjusting for education level, African Americans with disabilities are more likely to be in poverty than other disability groups. This racial disparity persists among adults with disabilities with higher levels of education.



MyPath has the opportunity to help address issues both within the disabilities community and within our community of employee-owners. At MyPath, 36% of employee-owners are BIPOC individuals, roughly in line with national statistics. According to a study conducted by the Rutgers Institute for the Study of Employee Ownership and Profit Sharing, ESOP programs can and do have an marked impact on narrowing gender and racial wealth gaps.

Nearly 70% of ESOPs are in these four industries: professional services, manufacturing, construction, and finance/insurance/real estate. These industries are typically male dominated and this plays a part in who works at ESOP companies. Health Care and Social Assistance companies, of which MyPath is one, represent only 2% of ESOPs. Our industry is predominantly female and representationally diverse. Because of this, we can have an outsized impact on narrowing gender and racial wealth gaps.

We have the opportunity to affect several of the SDG targets:

1. Target 10.1 – By 2030, progressively achieve and sustain income growth of the bottom 40 percent of the population at a rate higher than the national average.
 - a. Caregiving is an undervalued industry, with distinctly lower wages. As an employee owned company, MyPath returns the value of the company to the caregivers who create it. This value is returned through the ESOP as a company provided benefit with no contribution from the individual employee. In 2022 (the most recent year stats are available) MyPath had 1,585 plan participants whose accounts valued \$40.6 MM.
2. Target 10.2 – By 2030, empower and promote the social, economic and political inclusion of all, irrespective of age, sex, disability, race, ethnicity, origin, religion or economic or other status.

- a. MyPath, through business operations and through its ESOP, operates according to the goals of this target.

3. Target 10.3 – Ensure equal opportunity and reduce inequalities of outcome, including by eliminating discriminatory laws, policies and practices and promoting appropriate legislation, policies and action in this regard.

- a. MyPath has previously, and will continue to support the elimination of laws that discriminate against individuals with disabilities. Our services seek to provide equal opportunity through education, treatment, and community engagement.



SDG Goals

► SDG 4 – Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all.

We have chosen SDG 4 as a material topic because education is one of the three major components of the services MyPath provides. Every year we serve hundreds of students both locally and from throughout the country whose needs are beyond what can be supported in their home school districts. In addition, we also provide early childhood development services for children in need of ABA opportunities.



Target 4.1 – By 2030, ensure that all girls and boys complete free, equitable and quality primary and secondary education leading to relevant and effective learning outcomes.

- a. Students at each of our schools, T.C. Harris, Genesee Lake School, and each campus of the Richardson School receive

educational opportunities developed specifically around the best practices for teaching neurodiverse students.

Target 4.2 – By 2030, ensure that all girls and boys have access to quality early childhood development, care and pre-primary education so that they are ready for primary education.

- a. Genesee Community Services provides community and center based services utilizing Applied Behavior Analysis (ABA) techniques. These techniques help to prepare children for accessing academic services as they get older.
- b. Our clinic-based services are offered to children 18 months to 6 years old.
- c. Our community-based services are offered to children 18 months and up.

Target 4.3 – By 2030, ensure equal access for all women and men to affordable and quality technical, vocational and tertiary education, including university.



- a. Transition Services, run through Paragon Community Services, provides individuals opportunities for prevocational and vocational experiences with the ultimate goal of helping individuals to achieve competitive integrated employment.

- b. In the first year of operation we had 57 individuals access our programs.

Target 4.5 – By 2030, eliminate gender disparities in education and ensure equal access to all levels of education and vocational training for the vulnerable, including persons with disabilities, indigenous peoples and children in vulnerable situations.

- a. The mission for all MyPath schools is to provide innovative learning environments that acknowledge and focus on individual learning styles and strengths to cultivate equitable learning and promote independence.

Target 4.7 – By 2030, ensure that all learners acquire the knowledge and skills needed to promote sustainable development, including, among others, through education for sustainable development and sustainable lifestyles, human rights, gender equality, promotion of a culture

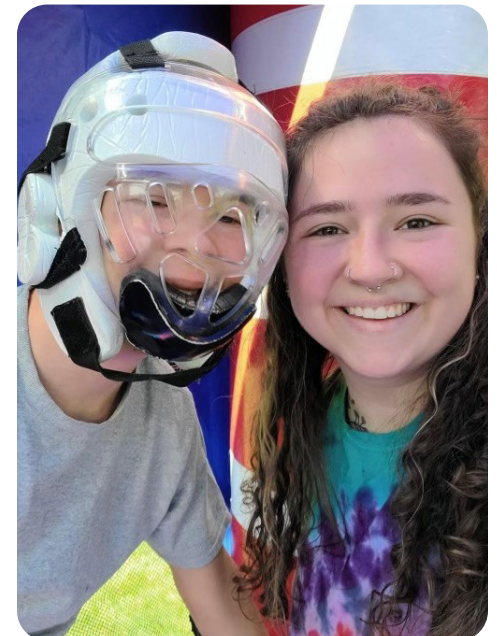
SDG Goals

of peace and non-violence, global citizenship and appreciation of cultural diversity and of culture's contribution to sustainable development.

- a. All Wisconsin schools are required to integrate the [Wisconsin Standards for Environmental Literacy and Sustainability](#) within their curriculum.

Target 4.a – Build and upgrade education facilities that are child, disability and gender sensitive and provide safe, non-violent, inclusive and effective learning environments for all.

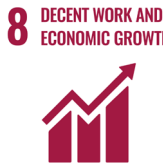
- a. Each of our education facilities is built to meet the needs of students. We have both purpose built educational environments and retrofitted educational environments. In both cases the environment is designed to be sensory friendly and inclusive. Our behavior management plans emphasize hands off de-escalation techniques and crisis cycle management.



SDG Goals

► SDG 8 – Decent Work and Economic Growth: Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all.

Target 8.5: By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value.



a. In January of 2023 Paragon Community Services launched Transition Services, a MyPath service line whose mission is completely in line with Target 8.5: To support people of working age and all abilities in achieving competitive integrated employment leading to enhanced social capital in their communities. We believe anyone can work in the community if the role is the right match for the individual's unique skills and interests, and if the person receives the appropriate supports. Competitive integrated employment should be the first and preferred employment outcome for all working age youth and adults.

In 2023, we had 13 admissions to our Empower Prevocational Skills Program.

Paragon's Empower Prevocational Skills Program is a hybrid of facility and community-based programming that works on skill development to lead to competitive integrated employment. When in the classroom, individuals receive instruction in employability skills, financial literacy, social skills, daily living skills, self-advocacy and rights, disability awareness, digital citizenship, and more. When in the community, individuals practice the skills developed in the classroom. Program participants also explore career opportunities through volunteering, business tours, and informational interviews.

In 2023, we had 14 admissions to our Employment Services offering.

Competitive Integrated Employment offers individuals typical jobs in the community, earning at least minimum wage, and working among peers without disabilities for the maximum hours consistent with the person's abilities and preferences. Paragon Employment Services is a service provider for the Wisconsin Division of Vocational Rehabilitation. Paragon offers the following services for consumers: customized employment, internship/temporary work, job shadow, and many more. Paragon Employment Services also provides long-term job coaching for both supported employment and customized employment consumers.



Looking Ahead

2023 was a year of new measurement and continued foundation setting. Our environmental initiatives have begun to take hold and our social and governance goals continue to drive strategic decision-making. As we move into the future, this work will continue to grow and strengthen as more MyPath employee-owners are engaged in these measures. In addition, this report marks the beginning of more significant Board engagement in ESG initiatives, as this is our first report to be approved by the MyPath Board of Directors before release.

ESG metrics do not exist on their own, they only function as part of the greater whole of MyPath. As indeed MyPath only functions as part of the greater whole of the industries and communities we operate in. We look forward to working together with our fellow employee-owners, our industry partners, and the wider business community to advance the goals of sustainable development and build the future we want for ourselves and for those we serve.



MyPath GRI Reporting

The organization and its reporting practices

► General disclosures

GRI Disclosure	
► 2-1	<p>a. Oconomowoc Residential Programs, d/b/a MyPath.</p> <p>b. MyPath is a private, for-profit, 100% employee owned company.</p> <p>c. MyPath's headquarters is in Oconomowoc, WI 53066.</p> <p>d. MyPath operates within the United States.</p>
► 2-2	<p>a. Included in the MyPath ESG report are its affiliates Homes For Independent Living (HIL), Prader-Willi Homes (PWH), Paragon Community Services (PCS), Genesee Community Services (GCS), Transitions Academy of Indiana (TAI), The Richardson School (TRS), Genesee Lake School (GLS), T.C. Harris School and Academy (TCH), ORP Real Estate Holdings (ORPREH) and MyPath Support Services (MSS).</p> <p>b. All entities included in MyPath's financial reporting are included in our ESG reporting.</p> <p>c. MyPath consists of HIL, PWH, PCS, GCS, TAI, TRS, GLS, TCH, ORPREH, and MSS. For reporting as MyPath, we consider all material impacts from each affiliate as reflected in MyPath totals.</p>
► 2-3	<p>a. MyPath reports ESG topics on an annual basis. This report covers the year from 1/1/2023 to 12/31/2023.</p> <p>b. MyPath reports financial topics on an annual basis from January 1st to December 31st of every year.</p> <p>c. This ESG report is published on September 12th, 2024.</p>
► 2-4	<p>a. There are no restatements of data from previous periods necessary.</p>
► 2-5	<p>a. There is no policy or practice for MyPath to seek external assurance regarding our ESG reporting.</p>

► Activities and workers

GRI Disclosure	
► 2-6	<p>a. MyPath is active in multiple sectors within the human services and education industries. Based on the International Standard Industrial Classification of All Economic Activities (ISIC) MyPath provides services in the following activity categories:</p> <ul style="list-style-type: none"> a. Section P – Education: “For each level of initial education, the classes include special education for physically or mentally handicapped pupils.” <ul style="list-style-type: none"> i. 8510 – Pre-primary and primary education: GLS, TCH, TRS. ii. 8521 – General secondary education: GLS, TCH, TRS. iii. 8522 – Technical and vocational secondary education: GLS, PCS b. Section Q – Human Health and Social Work Activities <ul style="list-style-type: none"> i. 8720 – Residential care activities for mental retardation, mental health and substance abuse: HIL, PWH. Note: We do not provide substance abuse services. ii. 8730 – Residential care activities for the elderly and disabled: HIL, PWH. iii. 8790 – Other residential care activities: TAI iv. 8810 – Social work activities without accommodation for the elderly and disabled: PCS, GCS. <p>b. MyPath provides community-based residential settings, care services, treatment programs, year-round education programs, and day services for children and adults with developmental, behavioral, medical, and emotional needs at over 130 sites throughout Wisconsin and Indiana. The company offers a continuum of care for individuals from childhood to adulthood. While MyPath has a physical presence only in Wisconsin and Indiana, MyPath works with up to 17 different states that send individuals to our program locations for care and services.</p> <p>As MyPath is a services company, our value chain has two parts. First is the value chain centered on individuals served. Upstream from MyPath is a wide variety of settings where individuals previously lived or studied, including individual living, family living, other placement agencies, local school districts, state institutions, and others. For many adult residents, due to their significant needs, MyPath provides a permanent home in which the resident will spend the remainder of their lives, with all of the support services associated with these settings. For children, MyPath provides education and treatment so that children can return to their homes and local schools and successfully complete their education. For our residential schools, children live with us. For our day service programs and day schools, individuals live with families, guardians, supported living, or independently, while we provide services during the day.</p>

GRI Disclosure

► 2-6

Second, the MyPath value chain includes the products and services we need to provide services under the first part of the chain. This includes hundreds of the typical suppliers one uses to run a household, a school, a day program, and a business, such as GPOs, Amazon, and local grocery and hardware suppliers. In 2023 we began the process of looking at suppliers through the lens of DEI and Environmental Commitments. This process will result in a MyPath Recommended Buying Guide in 2024. (See Social for details)

Downstream from MyPath is waste. We currently work with organizations to effectively dispose of waste, including recycling and compost. In October 2023, MyPath announced its involvement with Another Life, an initiative focused on the responsible disposal of waste.

c. MyPath works with several outside organizations to ensure effective reporting for its Employee Stock Ownership Plan (ESOP), including ESI for third-party valuation services, BDO for audit, and Principal for ESOP account administration.

d. There have been no significant changes compared to the previous reporting period.

► 2-7

a. Total Number of Employees broken down by gender and region.

	Men	Women	Total
Wisconsin	375	1162	1537
Indiana	118	189	307
Totals	493	1351	1844

b. Total number of:

i. Full-time employees (84% of MyPath)

	Men	Women	Total
Wisconsin	345	926	1271
Indiana	110	170	280
Totals	455	1096	1551

ii. Part-time employees (4% of MyPath)

	Men	Women	Total
Wisconsin	11	63	74
Indiana	3	1	4
Totals	14	64	78

iii. Casual employees (12% of MyPath)

	Men	Women	Total
Wisconsin	19	173	192
Indiana	5	18	23
Totals	24	191	215

c. The methodology used to calculate these numbers is general head count as an average over 2023.

d. MyPath uses the following definitions regarding employees:

i. Full-Time: regularly scheduled to work 30 or more hours per week

ii. Part-Time: regularly scheduled to work less than 30 hours per week

iii. Casual: not regularly scheduled to work, is assigned or requests work hours on ad hoc basis

GRI Disclosure	
► 2-8	a. All workers performing work for MyPath are employees. MyPath does not have workers who are not employees.

► Governance

GRI Disclosure	
► 2-9	<p>a. The governance structure of MyPath is dictated by state law as well as ERISA, the federal law that governs ESOP companies. A Trustee represents the interests of the shareholder employees who participate in the ESOP. The Trustee appoints the Board of Directors, which exercises oversight over the activities of management. The Board has a Human Resources Committee and an Audit and Compliance Committee. There is no separate committee on the Board that oversees ESG initiatives; the Board is responsible for such oversight.</p> <p>b. The Board currently includes eight members.</p> <p>a. The Board includes the Chief Executive Officer of MyPath and seven other members.</p> <p>b. Two Board members represent former shareholders, one Board member is the CEO, one Board member has a consulting agreement with the company, one was interim Executive Director for TCH for a part of 2023, and two are independent.</p> <p>c. The tenure of board members ranges from 30+ years (pre-ESOP) to three years.</p> <p>d. Board members have various other employment and volunteer activities, described publicly on the MyPath website.</p> <p>e. The Board includes two members of an under-represented social group.</p> <p>f. Each Board member brings to the board a specific background within either the human services industry or within a specific aspect of business in general, e.g. finance.</p> <p>g. Two board members represent the selling shareholders of the company. No other specific stakeholder groups are represented.</p>
► 2-10	<p>a. Current Board members and MyPath leadership may submit names of potential board members. If a potential board member is interested, the Executive Team, members of the Leadership Team, and the leadership of the MyPath Pathfinders groups all meet with the potential Board member. After collating feedback, the Board will make a decision to recommend to the ESOP Trustee that the candidate be invited to join the Board of MyPath. The Trustee conducts his own review to ensure that Board members are qualified, and ultimately it is the Trustee who selects the members of the Board.</p> <p>b. In assessing the potential for Board membership, MyPath looks for individuals who have experience within the broad human services field and who have a particular expertise in related sectors to MyPath operations. MyPath also looks for members who can add to the skills of the Board as a whole, for example, through community engagement experience, change management, or general finance. MyPath continually seeks to expand the diversity of the board to better reflect the company, the individuals we support, and the communities where we operate. The independence of the Board members depends on current business needs beyond Board participation and the relevant skill set of the Board member. MyPath has at times called on Board members for assistance on projects above and beyond Board participation.</p>

GRI Disclosure	
► 2-11	a. The chair of the MyPath Board of Directors is an external board member.
► 2-12	<p>a. The Executive Team of MyPath is responsible for developing, approving, and updating MyPath's Mission, Vision, and Beliefs and Behaviors. This team is also responsible for developing, approving, and updating MyPath strategies globally, which includes strategies related to ESG matters. The MyPath Board of Directors oversees the Chief Executive Officer and provides general oversight over MyPath.</p> <p>b. The ESG function was newly defined in 2023 and new processes for the oversight of ESG initiatives were put in place. MyPath released an Environmental Commitment to accompany its DEI commitment. MyPath also defined the five sustainability pillars that will guide our initiatives: energy, transportation, purchasing and waste, compliance and funder requirements, and environmental justice. Public reporting of results and project management were enacted. The Director of ESG and the Director of DEI both report directly to the CEO. Governance matters are managed by a combination of the Board, the Executive Team, and the Trustee of the ESOP.</p> <p>c. As the ESG initiative evolves, MyPath will create further policies around ESG matters, oversight, stakeholder engagement, and accountability. It is MyPath's goal to publish an annual ESG report coinciding when possible with financial reporting. MyPath ESG</p>
► 2-13	<p>a. The Board, through the CEO, has delegated specific responsibility for DEI related initiatives to the Director of DEI. The Board, through the CEO, has delegated specific responsibility for ESG related initiatives to the Director of ESG. The Executive Team has general oversight of ESG and DEI related initiatives as they cross functions of the entire company.</p> <p>b. The process for reporting to the Board and Executive Teams includes attendance at Board meetings and Executive Meetings as necessary and appropriate. It also includes a broad reporting process integrated within the company as initiatives are launched and are reviewed.</p>
► 2-14	a. The CEO and the Board of Directors review the ESG report before publishing. The CEO, with Board input, is responsible for approving to publish.
► 2-15	<p>a. The Board of Directors includes two representatives of the former shareholders of the company. These shareholders sold 70% of the stock in MyPath to the ESOP trust in 2016. When combined with the 30% previously sold to the employees, this transaction resulted in MyPath becoming a 100% employee-owned company. Each Board member discloses any possible conflicts of interest on an annual basis.</p> <p>b. There are no conflicts of interest to disclose regarding cross-board membership, cross-shareholding with suppliers or other stakeholders, an existence of controlling shareholders, or related parties, their relationships, transactions, and outstanding balances. Two MyPath Board members held professional services contracts with the company for specific purposes in this reporting period.</p> <p>a. MyPath has a published Conflict of Interest Policy for all MyPath employees in the MyPath Owner Handbook.</p>

GRI Disclosure	
► 2-16	<p>a. Critical concerns regarding MyPath operations are communicated to the Executive Team and the Board of Directors through established channels depending on the matter. MyPath businesses are extensively regulated by government entities such as Wisconsin Department of Children and Families, Wisconsin Department of Health Services, and the Indiana Department of Child Services. We must comply with contractual requirements with public agencies from around the country when serving individuals from other states.</p>
► 2-17	<p>a. There have been no measures taken to advance the collective knowledge, skills, and experience of the highest governing body of MyPath on sustainable development.</p> <p>b. There have been multiple measures taken to advance the collective knowledge, skills, and experience of the company at large. Examples include:</p> <p>a. Presentations on MyPath Agile calls around environmental initiatives, MyPath Environmental Initiatives, school applications for WI Green and Healthy Schools, and Environmental Pathfinders meetings monthly.</p>
► 2-18	<p>a. The Board of Directors evaluates its own performance on a regular basis, with oversight by the Trustee. There are no specific processes in place to evaluate the performance of the Board of Directors or the Executive Team in overseeing the management of the organization's impact on the economy, environment, and people.</p>
► 2-19	<p>a. MyPath provides fixed compensation for each member of the Board of Directors. Senior Executives receive a combination of fixed and variable pay based on company performance around quality, financial, and other goals. MyPath employees are eligible for sign-on bonuses or recruitment incentive payments as determined by the position hired. All full-time employees at MyPath are eligible for retirement benefits and stock grants from the ESOP after 4 months of employment.</p> <p>b. There are no specific pieces within compensation that relate to ESG objectives.</p>
► 2-20	<p>a. The process for determining remuneration for all MyPath employees, including the Executive Team, is based on a combination of position data from a third-party unrelated compensation services company and MyPath strategic priorities. In addition, certain MyPath programs operate within a business environment that sets rates for services. Externally set rates are taken into account. The MyPath HR Department works with Operations and Finance to develop and supervise remuneration policies, led by the Chief Human Resources Officer, Chief Financial Officer, and Chief Operations Officer.</p> <p>a. The Board of Directors sets CEO pay.</p> <p>b. As mentioned, several MyPath companies operate in a business environment where external stakeholders, often funders and regulators, set the rates for services. These rates directly affect remuneration policies as they limit the upper bound of pricing.</p> <p>c. MyPath works with PayScale to determine pay ranges for positions throughout the company. PayScale is independent of any MyPath stakeholders.</p>

GRI Disclosure	
▶ 2-21	<p>a. 12.76</p> <p>b. There was no increase for the highest paid individual at MyPath. The median percentage increase for all of the organization's employees was 5%.</p> <p>c. Excluded from these calculations are student employees who are working in a vocational program as part of their education.</p>

▶ Strategy, policies and practices

GRI Disclosure	
▶ 2-22	<p>MyPath's purpose, business strategy, and business model are all aligned to achieve positive impacts on the economy, environment, and people.</p> <p>Economy</p> <p>As a 100% ESOP company, the value created by our company remains with those who created it, our employee owners. By providing shares in our company at no cost to employees, we help to build long-term wealth for caregivers, a historically undervalued career path. As a human services company, we are rooted in our communities. We cannot be outsourced and we can only be augmented by technology, not replaced. Our economic benefit stays in our own communities. We do not have public and dispersed shareholders and we are driving our spending toward products and sellers who fit with our DEI and Environmental Commitments.</p> <p>Environment</p> <p>MyPath believes individuals should be supported in the least restrictive setting possible consistent with that individual's abilities and desires. By promoting individual over congregate settings, this approach may contribute to a larger environmental footprint; however, our goal of recognizing the dignity of each individual and providing an opportunity for them to take part in their own community is our foundation and is non-negotiable. We seek to reduce our footprint where possible through efficiency measures in energy and transportation, through effectively spending dollars where possible on products that are not toxic to the environment, and through community engagement opportunities such as volunteering with local groups to protect the environment of our communities. We also seek to beautify our own properties through the planting of native pollinator friendly plants, growing our own food, and planting trees to help offset our necessary emissions. (See Environment)</p> <p>People</p> <p>Protecting and enhancing the rights of individuals with disabilities is why MyPath exists. Our company is built on the deinstitutionalization movement that fought to support individuals with special needs within either their own community or within a supportive community. We also exist to create careers for individuals who want to spend their lives working on behalf of others. As a 100% employee owned company diversified across many industries, we seek to grow and empower caregivers and give them the opportunity to create their own path to a satisfying and financially secure career. In addition, ESOPs have been shown to have a disproportionately positive impact on wealth disparities driven by race and gender. (See Social and SDGs).</p>

GRI Disclosure	
	<p>Short Term</p> <p>As the ESG initiative started at MyPath, our short-term plans were around measurement. We measured Scope 1 and Scope 2 GHG emissions and utilized already existing systems to monitor fleet usage and reduce extended idling instances. Our emissions vary from year to year as our program sites and vehicle count changes. We are working on a process to better understand emissions and best practices for vehicles and our variety of settings. Once this process is in place we will discuss any engagement with Net Zero initiatives. Our understanding is growing as we explore company purchasing and waste and early movement toward more sustainable and targeted purchasing, as well as more sustainable waste removal, is underway. (See Social section regarding purchasing changes) We are using e-waste recyclers, we are focusing on the expansion of recycling services, and we are in the final stage of developing a sustainable purchasing guide. We will continue to report on all initiatives in our ongoing MyPath ESG report. We are also presenting at various conferences in our industries to share our journey so far, including both Human Services and Employee Ownership conferences.</p> <p>Long Term</p> <p>In the long term, MyPath seeks to live up to its various ESG related commitments and to manage the company in a manner that will provide high quality care and steadily increasing share value for our employee owners. As an employee-owned company, we seek perpetual operations and will make decisions to ensure this will happen. We will measure Scope 1 and 2 GHG emissions and seek appropriate mitigation strategies to comply with international goals around Net Zero. (See GHG Measures in Environment) We will have an organized system to ensure procurement and waste streams uphold Environmental and DEI commitments. We seek to be market leaders in the ESG space. What we learn, we will share with others in the human services industry and the ESOP industry.</p> <p>Trend Impact</p> <p>MyPath is subject to a variety of broad macroeconomic, social, and political trends. Our industry is almost completely funded by government dollars and the trends around spending will directly affect our company. Whether that is through an increase in investment in education or through a cut in human services and Medicaid funds, these larger shifts will have an outsized impact on MyPath. In addition, political trends such as the polarization of the American electorate and our government will directly affect the funding and laws that guide our industry. We must keep close watch on our government partners to understand where the future is heading. The social trends of the past few years—including the COVID-19 pandemic, public health emergencies, racial justice movements, and a reduction in workforce participation in healthcare and education—have had tremendous impact on MyPath. MyPath has also been subject to the trends around racial justice that are ongoing. Our employee base has a significant percentage of non-white employees from a number of historically marginalized communities. By seeking to create financially stable careers within human services and providing ownership in the company, we are working to correct the historical economic injustice visited on BIPOC individuals. Finally, the reduction in workforce participation has hit our industry hard. Caregiving is a difficult and often lower paid industry in the United States and when workforce participation rates lower, we are often hit first. There are many theories as to why participation is down, including generational transitions, lingering pandemic issues, and others, but whatever the cause is, the results are clear in the human service industry: fewer employees.</p>

GRI Disclosure	
	<p>Key Events</p> <p>During the reporting period of 2023, a variety of key events occurred:</p> <p>Environmental</p> <p>The first two MyPath wide environmental initiatives were implemented. The first is Impede the Idle, a program designed to bring attention to and reduce idles longer than 30 minutes. The second is Another Life, a program designed to take full advantage of recycling initiatives available throughout the company, including e-waste.</p> <p>MyPath fully engaged with the WI Focus on Energy program, pursuing rebates for more efficient equipment. MyPath also began to utilize Energy Star Portfolio Manager property management software to help understand energy usage in our built environment.</p> <p>Two of our schools, TRS Madison and GLS, received recognition for their environmental initiatives and education through the Green and Health Schools program run by WI DPI and WI DNR.</p> <p>MyPath published its first ESG report, reporting emissions publicly for the first time and setting a foundation for reporting into the future.</p> <p>Social</p> <p>In 2023, due to the efforts of the Director of Diversity, Equity and Inclusion and company partners, MyPath made a significant number of advances around social impact issues.</p> <p>MyPath Pathfinder groups operated their first full year with 84 individual meetings that included 140 different employee-owners who attended at least one session.</p> <p>Many Pathfinder groups ran initiatives or events relevant to their focus area. Examples include the Mental Health Month of Giving, Generations 5K, Race and Ethnicity's Owner Dignity Process, and many more. (See Social Spotlight)</p> <p>MyPath leaders delivered nine external presentations on its ESG and DEI programs at various trade association conferences and meetings.</p> <p>Governance</p> <p>MyPath adopted its first Stakeholder Code of Conduct. (See Governance Spotlight.)</p> <p>Performance Against Historical Goals</p> <p>In our second ESG report, MyPath is reporting on our Scope 1 and 2 emissions for the second time. However, comparison is difficult because the properties and vehicles upon which this data is built change yearly. Programs close or shift, and vehicles are sold or upgraded. We are working on a process of general energy use so we can have data that will allow for some comparison and best practice setting and we hope to have this process for the 2024 report.</p> <p>Our first major environmental initiative, Impede the Idle, has a full year of data and we are working to understand the results and work with programs and drivers to reduce long idles. Results will be reported in the 2024 report.</p>

GRI Disclosure	
	<p>Sustainable purchasing guidelines began in 2023 but will be fully in place in 2024. (See Social)</p> <p>Future possible material goals also include metrics such as programs with full recycling options, percentage of e-waste recycled and documented, and percentage of land restored with native plants and ecology.</p> <p><i>Contributing to Sustainable Development in the future</i></p> <p>MyPath faces several challenges as we move toward sustainable development goals. The first is external: the funding environment we operate in and the broader material trends affecting our industry. If our industry is not adequately supported, the ability to move toward environmental goals in particular will be affected. The second is internal: as we progress in our ESG process, we will need to create the environmental part of our ESG system from scratch. We need to first measure, then set goals, and then progress against these goals.</p>
<p>► 2-23</p>	<p>a. In 2023, MyPath was not specifically committed to any national or international policy around responsible business conduct or human rights.</p> <p>b. Our internal commitments were through our Mission, Vision, and Beliefs and Behaviors as well as through our DEI Commitment and our Environmental Commitment.</p> <p>c. MyPath is held to strict regulatory standards in all of our business lines around the human rights of those we serve. These standards are included in our licensing codes required by WI and IN.</p>
<p>► 2-24</p>	<p>a. The MyPath Beliefs and Behaviors, MyPath Stakeholder Code of Conduct, and the MyPath DEI Commitment are distributed to all new hires and are referenced in all applicable trainings. Some companies use the Beliefs and Behaviors in Employee Performance Evaluation systems. Both the Beliefs and Behaviors and the DEI Commitment are used in strategic planning processes throughout the company.</p>
<p>► 2-25</p>	<p>a. MyPath has a variety of processes regarding the remediation of negative impacts. These processes are dictated by the regulatory environment of the individual program within MyPath. For example, we have Mandatory Reporting in Wisconsin that requires by law our staff to report child abuse or neglect to a county or law enforcement representative. From the MyPath Owners Handbook:</p> <p><i>If you observe or suspect abuse, neglect, or any other mistreatment of clients you are required to immediately notify Management in accordance with your Company's policy and procedure. The Company also requires that any instances of harassment, discrimination or any other policy violations, or behavior that is not in the best interest of the clients be reported to your Supervisor, any member of local management, or Human Resources immediately. All reports will be investigated, and confidentiality will be maintained to the extent possible. Owners who have followed their Company notification policy may speak with any member of management with whom they feel comfortable if a problem arises where they believe normal channels did not work. No Owner will be subjected to retaliation for making a good faith report. Any behavior or action that could dissuade someone from further reporting is considered to be retaliatory and will not be tolerated. Owners that engage in harassing, discriminatory or retaliatory behavior will be subject to corrective action, up to and including termination.</i></p>

GRI Disclosure	
► 2-26	a. MyPath uses Lighthouse Services as an anonymous confidential reporting hotline. This hotline is dedicated for employees to report instances of fraud, compliance and ethics violations, and human resources issues. All employees are informed about this option upon hire and regularly through postings in employee areas within programs. Each MyPath employee also has confidential reporting opportunities through the regulating body of the industry in which their company provides services. For example, T.C. Harris employees can report to the Indiana Department of Child Services. Each regulating body has its own system for investigation.
► 2-27	a. There were no material instances of non-compliance with laws and regulations or fines paid during 2023.
► 2-28	a. MyPath holds no significant roles in associations as defined in the GRI standards. However, MyPath is a member of multiple trade organizations, including WAFCA (Wisconsin Association of Family and Children's Agencies), WALA (Wisconsin Assisted Living Association), and IARCA (Indiana Association of Resources and Child Advocacy).
► 2-29	a. Within MyPath, there are a variety of stakeholder engagement groups. These include those representing the individuals we serve (PWH Resident Rights Committee), the families of the individuals we serve (GLS Student and Family Engagement), and employees (ESOP groups, Pathfinders groups, etc.). MyPath seeks to ensure each stakeholder group has a platform to engage with the company effectively. Information from these groups contributes to change at the organization level.
► 2-30	a. MyPath does not have employees under collective bargaining agreements.

► Strategy, policies and practices

GRI Disclosure	
► 3-1	<p>a. The process to determine material topics for MyPath has evolved.</p> <p>MyPath is a human services company, founded on the belief that all individuals have a right to be full members of their community no matter their needs and disabilities. Each MyPath program area has its own metrics of success in what is materially important in pursuit of this vision.</p> <p>For example, MyPath schools measure academic and behavioral progress for students. Adult residential programs measure the number of individuals effectively supported in the community. Adult day programs measure how many participants are served, and transition programs measure how many individuals find supported employment at all levels.</p> <p>Because MyPath's reason to exist is to provide services in support of people, material topics can include not only individual company goals but also overall MyPath success. The more people served effectively, the more successful MyPath is overall as a business.</p>

GRI Disclosure	
	<p>a. The process to determine material topics for MyPath has evolved.</p> <p>MyPath is a human services company, founded on the belief that all individuals have a right to be full members of their community no matter their needs and disabilities. Each MyPath program area has its own metrics of success in what is materially important in pursuit of this vision.</p> <p>For example, MyPath schools measure academic and behavioral progress for students. Adult residential programs measure the number of individuals effectively supported in the community. Adult day programs measure how many participants are served, and transition programs measure how many individuals find supported employment at all levels.</p> <p>Because MyPath's reason to exist is to provide services in support of people, material topics can include not only individual company goals but also overall MyPath success. The more people served effectively, the more successful MyPath is overall as a business.</p> <p>In 2003, MyPath became 30% employee owned and in 2016, it became 100% employee owned. Not only does employee ownership impact the people within the MyPath ecosystem but it is an economic driver for the communities where we operate. ESOPs have repeatedly been shown to be more financially supportive of employees and their communities across the country. Material topics here include the number of plan participants, the total value in participant accounts, and the annual share price.</p> <p>In 2021, MyPath created the role of Director of Diversity, Equity, and Inclusion to oversee the expansion of DEI initiatives. Since then, DEI initiatives have grown to include surveys, Pathfinder Employee Resource Groups, and a variety of trainings to drive the goals of DEI. Material topics include Pathfinder participation, DEI survey results, and a demographically similar profile within management of overall company employee owners.</p> <p>In 2023, MyPath created the role of Director, ESG to oversee ESG initiatives generally and Environmental issues more specifically. In 2023, two companywide environmental initiatives were announced and enacted, around idling and recycling, and a variety of systems were put in place to measure issues related to the five MyPath Sustainability Pillars: energy, transportation, purchasing and waste, compliance and funder requirements, and environmental justice. Material topics include Scope 1 and 2 emissions, energy efficiency savings, and the utilization of environmentally sustainable products and food.</p> <p>b. The stakeholders and experts who have determined these topics are many and varied.</p> <ul style="list-style-type: none"> a. Industry best practices are pursued and followed by each MyPath company for service provision. b. Resources such as National Center for Employee Ownership (NCEO) are used for information regarding employee ownership. c. Resources such as research studies, market leaders, and best practices are used for DEI and environmental initiatives. d. Standards such as GRI, UN SDGs, and B-Impact Lab Scorecard are used as proxies for best practices when possible. e. Other business ESG reporting is also used for reference, including from both within and outside our industries. <p>c. The highest governing body of MyPath, the Board of Directors, is responsible for reviewing and approving the reported information, including the organization's material topics.</p>

GRI Disclosure	
► 3-2	<p>a. For the 2023 report, material environmental topics are based on the five MyPath Sustainability Pillars: transportation, energy, procurement & waste, compliance, environmental justice. Material topics also include UN SDG Goals 4 (Quality Education), 5 (Gender Equality), 8 (Decent Work and Economic Growth) and 10 (Reduced Inequalities).</p> <p>b. For the 2023 report, we have added SDG Goals 4 and 8 as material topics.</p>
► 3-3	<p>Transportation</p> <p>a. Transportation is a material topic for MyPath because it is a priority that those we serve become and remain a part of their individual communities. This includes travel to cultural activities, work or day programs, sporting events, religious services, and other important activities. Transportation positively affects the human rights of those we serve by ensuring the individuals served are deeply involved in their local community. Historically, individuals with disabilities were shut away in institutions and not allowed to participate in normal community life that most take for granted. We remedy that injustice by standing true to our community based structure. In addition, community-based organizations by their very nature have a larger economic impact on their community through greater engagement with local businesses and other organizations. However, community-based organizations also by their very nature have a larger environmental impact through the use of individual homes or apartments and through extensive use of vehicles.</p> <p>b. Negative impacts for transportation are realized through our internal activities.</p> <p>c. MyPath has an Environmental Policy and Vehicle Policy to oversee transportation.</p> <p>d. In 2023, MyPath created its first environmental initiative around transportation, a focus on idles over 30 minutes throughout our fleet. Alerts were created for all fleet managers and occurrences were tracked for the entire year. Fleet managers investigated idles and in 2024 will have baseline data to benchmark against for goals moving forward.</p> <p>e. Fleet managers received alerts through Azuga, our fleet management system, for all idles over 30 minutes. 2023 was a baseline year so effectiveness will be measured in 2024.</p> <p>f. As the idling initiative rolled out feedback was received around the usage of wheelchair vans and that impact on idling. This feedback was included in measurement.</p> <p>Energy</p> <p>a. As a distributed company with operations across more than 100 sites in two states, our energy usage is a significant cost. While energy is necessary to provide high quality of life care, energy management is critical to reduce our environmental impact and costs where possible. Our energy usage occurs at our various sites and the source mix is dependent on the local power company mix.</p> <p>b. Our energy usage is a result of company activities.</p> <p>c. The MyPath Environmental Policy includes discussion of the usage of LED lighting, energy efficient appliances, programmable/smart thermostats, each of which is directed toward lowering energy usage while ensuring high quality of life for those served.</p>

GRI Disclosure	
	<p>d. The MyPath Environmental Policy dictates that energy efficient appliances and other purchases should occur when possible.</p> <p>e. As MyPath energy usage is site based and distributed, there is no overall management system. In 2023, MyPath began using Energy Star Portfolio Manager software to measure building usage against national Energy Star metrics. PM will be used to build out an environmental building management program.</p> <p>f. Engagement with Focus on Energy, the Wisconsin based energy efficiency program, as well as Energy Star, has helped to develop initial building management thinking. Focus on Energy helps to determine cost and emissions savings based on different products and Portfolio Manager helps benchmark MyPath building against national standards of efficiency.</p> <p>Procurement & Waste</p> <p>a. MyPath operates a variety of sites that care for individuals at all stages of life. The products that MyPath purchases include common household products, medical grade products, educational products, farm products (for Homegrown Farms), etc. On the other end, the disposal of waste varies depending on municipalities. There are recycling programs throughout MyPath sites where available, but usage can be spotty. Electronic waste can be an issue and while the Environmental Policy encourages the proper disposal of electronic waste, an overall MyPath procedure for effective disposal for both company and client products does not exist. In 2023 our IS department began a relationship with an e-waste vendor that was not successful and our disposal strategy of using Goodwill continues. In 2024, we will be exploring a partnership with Digital Bridge, an e-waste vendor located in Milwaukee. Food waste is likely comparable to regular household food waste and composting is only available at GLS through Homegrown Farms. The Environmental Spotlight of this report gives a deeper dive on food waste activities at GLS.</p> <p>b. Negative impacts are a result of MyPath activities.</p> <p>c. The MyPath Environmental Policy encourages the usage of environmentally friendly products (paper & cleaning supplies), the utilization of recycling programs where available (including e-waste), and the purchase of energy efficient products.</p> <p>d. There are no overall procedures to manage procurement and waste. A MyPath purchasing guide is planned for 2024 with overall recommendations. In Q4 of 2023, a preferred vendor/product policy went into effect on the MyPath Amazon Business account. More detail is reported in the social section of this report.</p> <p>e. With Amazon Business, reporting on purchases is now measured.</p> <p>f. There are different approaches to procurement and waste at different operating companies depending on company managers.</p> <p>Compliance</p> <p>a. As MyPath works with a variety of different funding agencies, our contracts often contain environmental clauses, ranging from general (compliance with the Clean Air Act) to specific (requiring a plan to phase out single use plastics). This topic is material because it places external requirements on the company that can have far-reaching impacts. Our compliance goals, while few currently, are increasing and all move in the direction of reducing negative impacts on the environment and consequently improving the quality of life for staff and those served.</p>

GRI Disclosure	
	<p>b. Actions through compliance are undertaken due to the contractual obligations with outside stakeholders.</p> <p>c. MyPath has no official policy around Environmental Compliance because we are contractually obligated to undertake these initiatives.</p> <p>d. The management process of these requirements will depend on the area of the company that is affected. For example, The Richardson School—West Allis has contractual requirements with one customer that it make a good faith effort to phase out single use plastics and Styrofoam. Four people were determined to have purchasing responsibilities and will need to be aware of, and follow, obligations.</p> <p>e. Effectiveness is measured by operating companies through normal contractual obligations.</p> <p>f. These goals are entirely driven by our external contracting agencies.</p> <p><i>Environmental Justice</i></p> <p>a. Environmental Justice is an issue that has historically affected those we serve (individuals with disabilities) as well as a large percentage of our employee population. Our company purpose of being community-based is in response to the denial of human rights for individuals with disabilities rampant throughout American history. Our MyPath Environmental Commitment states: <i>We believe our clients and our employee owners have the right to live in communities with clean air, clean water, and a thriving natural environment.</i></p> <p>b. We are not involved with negative impacts in this topic.</p> <p>c. MyPath has no policies or commitments specific to this topic. Our Environmental Commitment includes these issues and our standard business practices are working toward the improvement of this topic.</p> <p>d. There were a variety of actions taken to manage positive impacts, including the integration of environmental education within curricula, farm to school programming, engagement with community projects by employees such as river clean up, and the planting of native species and pollinator gardens across a variety of MyPath programs.</p> <p>e. Effectiveness tracking can be found in standard business metrics for applicable topics.</p> <p>f. Stakeholder engagement was widespread through the Environmental Pathfinder Group.</p> <p><i>SDG 4 Quality Education (New)</i></p> <p>a. MyPath chose SDG 4 as a material topic because one of the three major components of the services MyPath provides is education. Every year we serve hundreds of students both locally and from throughout the country whose needs are beyond what can be supported in their home school districts. In addition, we also provide early childhood development services for children in need of ABA opportunities. Moreover, according to the National Center for Education Statistics, the need for our services is growing. In the 2022-23 school year the number of students served under IDEA reached an all-time high of 7.5 million students. This equates to a 2 percent increase in the percentage of total public school enrollment in 10 years.</p>

GRI Disclosure	
	<p>b. We are not involved with negative impacts in this topic.</p> <p>c. MyPath has a variety of policies and commitments specific to this topic. Included in these are our policies within each school and program, including both those mandated by our regulatory bodies and those decided upon by the company.</p> <p>d. The actions taken to manage positive impacts are embedded in our core business. It is our goal to provide the necessary tools for students to return to their home districts. Our outcomes are measured by both the state and internally.</p> <p>e. Effectiveness is found in measuring a variety of metrics, including IEP goals met, number of students leaving to a lower level of support, and others.</p> <p>f. Stakeholders engaged include national and local education research around best practices for the education of neurodiverse learners, a variety of surveys and other communication with families of our students, and open and continual communication with sending school districts.</p> <p><i>SDG 5 Gender Equality</i></p> <p>a. MyPath chose SDG 5 as a material topic for two reasons. The first is our employee makeup, where more than 70% of our employee-owners are women. Issues of gender equality are particularly relevant to MyPath. The second is around those we serve, as issues regarding gender are just as prevalent within the disabilities community as they are in the non-disabled community.</p> <p>a. Employee Owners: There is a large historical inequality in the amount of company ownership owned by women, whether through public markets or through private ownership. The MyPath ESOP counteracts this historical trend by providing direct ownership, at no cost to the employee, of her place of employment. This economic benefit is rare and can be very lucrative for retirement purposes if the employee remains with the company long term. This in turn gives women more agency in their financial life.</p> <p>b. Clients: All issues surrounding gender in society also affect those we serve. Whether this is through children attending our schools going through all of the growth everyone experiences regarding gender or through adults and ensuring access to quality care for women, MyPath seeks to address them all.</p> <p>b. MyPath is not involved in negative impacts around SDG 5 goals.</p> <p>c. We have a variety of policies around SDG 5; please see the SDG 5 section of this report.</p> <p>d. Please see the SDG 5 section of this report.</p> <p>e. Please see the SDG 5 section of this report.</p> <p>f. Engagement with stakeholders has included everything from general employee surveys to the creation of the Women's Pathfinder Group. Organizational standards around surveys work to ensure necessary changes are made and the Women's Pathfinder Group has its own process of working to ensure goals are met.</p>

GRI Disclosure	
	<p><i>SDG 8 Decent Work and Economic Growth (New)</i></p> <ul style="list-style-type: none"> a. MyPath chose SDG 8 as a material topic because in 2023 we moved into the vocational space through the opening of Transition Services. Transition Services is built to support people of working age and all abilities in achieving competitive integrated employment leading to enhanced social capital in their communities. By creating this offering, we can help support individuals in achieving their work goals and bringing historically marginalized people into the workforce thereby driving additional economic growth. b. MyPath is not involved in negative impacts around SDG 8 goals. c. MyPath, through Transition Services, is committed to helping individuals achieve competitive integrated employment. d. Business line success is directly in line with SDG 8. e. Standard business metrics are applied to determine effectiveness, including number of individuals served. f. Transition Services is community oriented so constant and open communications with external stakeholders who are potential and current employers is critical. <p><i>SDG 10 Reduced Inequalities</i></p> <ul style="list-style-type: none"> a. MyPath chose SDG 10 as a material topic because our entire purpose as a company is to reduce the inequalities faced by those with developmental disabilities and mental health needs. As our company successfully opens and operates our programs, we are providing the opportunity for those we serve to access a better quality of life than is generally possible without support. This is critical for the human rights of individuals with disabilities. In addition, by creating a community-based company we are keeping funds within the local community where the program exists through our interactions with small businesses and cultural assets. b. We are not involved in negative impacts around SDG 10 goals. c. MyPath policies and commitments around reducing inequalities are built into the foundation of the organization, all MyPath policies and commitments that further our company mission work towards reducing inequality. d. Our company industry is dedicated to reducing inequality so all company actions are at least generally taken to achieve this goal, even if they are only to facilitate the success of the business. e. We use both population metrics (clients served) and internal metrics (financial, HR) to determine the effectiveness of the actions taken. f. To determine the course of our business we engage with a wide variety of stakeholders, including: customers/clients/students, families, local government, state agencies, local school districts, Managed Care Organizations, trade associations, and others. This occurs on an ongoing basis.

