Diversity at Oak Street Health







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Introduction



Oak Street Health is glad to share our annual Diversity, Equity and Inclusion (DE&I) Report.

Our mission is to Rebuild Healthcare as it Should Be. This mission is advanced through our relentless commitment to DE&I. Our vision is to build Oak Street Health into the leading healthcare provider for Diversity, Equity and Inclusion, for our team, our patients and our communities.

Since the last DE&I Report, we rolled out the "Oaky Way" -- a framework for how we do our work -- which reinforces our common purpose of creating a sense of belonging and inspiring confidence to deliver the unmatched care our patients and communities deserve. We aspire to do this every day through our DE&I efforts.

Our DE&I-related data collection methods have amplified in an effort to improve quality of care for our patients and tailor policies and programs for our team members (Oakies); we provided training to Oakies on the importance of voting and civic engagement and the impact it has on health outcomes, resulting in hundreds of our patients being assisted to vote in 2022; our People Resource Groups (PRGs) have continued to grow in terms of the types of groups, number of members and initiatives delivered; we have further embedded DE&I into our recruitment, onboarding and performance processes, which supports our goal of building more diverse teams; and we have launched a variety of DE&I learning opportunities to increase awareness and support personal and professional development.

Our team of Oakies remains very diverse, and we are continuously aiming for measurable improvements in representation. This work remains an urgent priority for Oak Street, and we are delighted to share our progress and workforce data in this document.

Thank you for taking the time to review this report.



Geoff PriceChief Innovation Officer
DE&I Executive Sponsor



Charniece TisdaleDirector DE&I

DE&I Progress @ Oak Street Health

Last year, we established four key objectives to help drive DE&I forward at Oak Street Health.

- 1. Inclusion of DE&I in People Processes and Policies. Ensure that all Oak Street Health people processes and policies in the talent lifecycle (i.e., recruiting, training, benefits) include DE&I best practices.
- 2. Enhanced DE&I Data Collection. Collect and utilize patient and employee demographic and inclusion data to deliver culturally competent care consistently, and to ensure inclusive and equitable decision-making processes for our internal workforce.
- 3. Consistent DE&I Communication. Standardize internal and external DE&I communication in order to increase DE&I awareness among all Oakies.
- 4. Increased Belonging among Oakies. Identify and create opportunities to connect team members by fostering a sense of inclusion and belonging.

In the following pages we provide an update on our progress in these areas.



DE&I Objective 1

Inclusion of DE&I in People Processes and Policies

Each year, we administer a bi-annual Oaky Engagement Survey that provides team members with the opportunity to share feedback on their experiences across a variety of organizational measures. In 2022, our overall DE&I Efforts and Belonging scores both increased 4 points from our mid to year-end assessments. We are proud of the progress made and look forward to continuing the momentum.

Progress Updates:

- Launched a series of micro e-learning courses on a variety of DE&I topics such as Bias, Race and Ethnicity, Microaggressions, LGBTQIA+ and Disability. The e-learning courses were accompanied by quarterly deep dive discussions focused on the applicability of specific topics.
- Added a DE&I Impact Index for people managers into our bi-annual engagement survey in order to assess and help leaders understand how their team members perceive the ways in which they demonstrate key leadership behaviors that support belonging and inclusion.
- Developed a DE&I Quick Guide for all Oakies and senior leaders, which contains actionable steps that all Oakies can take towards achieving our DE&I goals, while supporting each other.
- Assessed our Executive Committee on DE&I topic areas they would like additional coaching and/or training on, and contracted with an external vendor to deliver customized sessions that deepen the individual and collective understanding of the Race, Equity, Diversity, & Inclusion (REDI) approach to building a more inclusive and equitable organization.
- Created a DE&I Recruitment Process Talk Track for hiring managers and recruiters to ensure aligned and proactive communication around Oak Street's DE&I efforts and to field common questions for potential candidates.
- Hired Oak Street's first Chief Wellness Officer to enhance provider and care team wellness and foster a positive culture in aim of our Great Place to Work and Leader in DE&I vision.
- Instituted Juneteenth as a paid holiday, beginning in 2023.

DE&I Objective 2

Enhanced DE&I Data Collection

Progress Updates:

- Published our inaugural Social Impact Report, which highlights the impact that we are making on patient outcomes, the communities we serve and the U.S. healthcare system overall. <u>Click here</u> to access the report.
- Integrated Race, Ethnicity and Language (REL) patient data capture into our Screening & Vaccination program as a new measure. Additionally, REL data capture training was provided to Medical Assistants and Patient Relations Managers.
- Piloted an initiative for Sexual Orientation and Gender Identity (SOGI) patient data capture. This included adding SOGI fields to our data warehouse, and collecting data and providing training for Providers and Clinic Informatics Specialists at three pilot centers.
- Conducted our first voluntary workforce self-identification (Self-ID) data capture campaign aimed at better equipping Oak Street to make inclusive and equitable decisions regarding policies, processes and programming.



DE&I Data Collection Progress in Action: Self-Identification at Oak Street

In an effort to advance our goal of being a Great Place to Work and Leader in DE&I while championing the Oaky Way, we launched our first team member self-identification campaign, titled "See Me, Know Me: Self-ID at Oak Street."

The goal of the campaign was to capture accurate and up-to-date selfidentification information about all Oakies on the following dimensions:

- Disability Status
- Gender Identity
- Sexual Orientation
- Parent and/or Caregiver Status
- Military Status

We believe this data will better equip us to make more inclusive and equitable decisions regarding policies, processes and programming for our workforce, such as benefits and accommodations. It will also:

- 1. **Provide a more complete picture of our workforce** allowing us to have a better understanding of intersecting identities among Oakies
- 2. **Drive DE&I efforts and programs**, specifically related to creating a more inclusive environment
- 3. Improve work culture and belonging through more targeted initiatives, and
- 4. Allow Oak Street to set strong DE&I goals, measure diversity and inclusion in new ways and offer the opportunity to reflect on strengths and areas for growth

We were able to capture some initial baseline data during the campaign. In 2023, we aim to increase participation by incorporating Self-ID into new and existing processes and systems.

DE&I Objective 3

Consistent DE&I Communication

Progress Updates:

- The DE&I Director embarked on a year-long "roadshow" across Oak Street Health to provide teams and leaders with an overview of the DE&I priority areas for 2022 as well as to discuss role-specific actions and opportunities for collaboration.
- Instituted quarterly DE&I updates that include progress on our DE&I objectives and plans, Oaky leaders in DE&I, ways our centers and teams celebrate DE&I and opportunities to get more involved in our DE&I efforts.
- Refreshed the organization-wide People Resource Group (PRG) quarterly newsletter to include a PRG Member Spotlight, updates/announcements and a "What our members are reading, watching, and listening to" section in order to get to know Oakies more closely.
- Created an organizational Oak Street Health DE&I calendar to help Oakies plan activities for some of the most-celebrated DE&I holidays and events.
- Updated DE&I internal and external web pages to include the latest information, tools and resources



DE&I Objective 4

Increased Belonging among Oakies

Progress Updates:

- Established three new People Resource Groups (PRGs) Black @ Oak Street
 Health, Global and Multicultural PRG and Military and Veteran PRG (see page 12 for more information).
- Celebrated Women's History Month and International Women's Day by hosting a series of interactive events ranging from guest speakers to speed networking to a financial wellness seminar. These events were coordinated and sponsored by our Women's and Female Minorities in Medicine (FM^2) PRGs.
- Hosted virtual panels for Black History Month, Asian American and Pacific Islander (AAPI) History Month and Hispanic Heritage Month. These panels consisted of a variety of team members from Oak Street and RubiconMD who shared their personal and professional experiences and the intersections of their identities.
- Celebrated Pride across the organization with a variety of activities, including LGBTQIA+ patient care training with RubiconMD, lunch and learns with internal and external speakers, distributing swag, participating in local Pride parades, and more.
- Kicked off a DE&I Spotlight Video initiative that highlights different Oakies, their personal passions and inspiring stories. The short videos are conducted in an interview format, allowing team members to share a wealth of information regarding their commitment to DE&I inside and outside of Oak Street.
- Celebrated Diwali at the Treehouse (corporate office) and in centers. The Global & Multicultural PRG (GMP) organized Oak Street's first organization-wide celebration of the Indian festival of lights by providing decorative items, educational information and a special snack to celebrate the festival.
- Conducted our first cross-team movie watch and discussion on a topic relevant to DE&I. Provided tickets to almost 200 of our PRG members to watch the movie Till, based on historical events related to the murder of Emmett Till, and hosted two virtual meetings to discuss current implications and opportunities for advocacy.

Celebrating DE&I with Oakies

2022 was all about finding ways to celebrate our organization, our teams and individuals. Below are just a few examples of how our local teams recognized and celebrated various cultural and diversity-related events in our aim of being a Great Place to Work and Leader in DE&I.



Germantown Team (Philadelphia) celebrating Black History Month with custom made t-shirts designed by their Sr. Practice Manager



Roosevelt Team (Philadelphia) celebrating Women's History Month in their center



Cherry Hill Team (Michigan) celebrating Pride month in their center



Treehouse (HQ), Population Health team and Chicago-based Oakies at a local volunteer event for Juneteenth



West Bellfort Team (Texas) created a cultural wall in celebration of Hispanic Heritage Month



Treehouse team members packed over 170 gift boxes in celebration of Diwali

People Resource Groups at Oak Street

Diversity, Equity, and Inclusion make us stronger. That's why Oak Street Health is proud to support People Resource Groups (PRGs). PRGs are voluntary, team member-led groups focused on fostering diversity, inclusion, and belonging.

These groups help team members build stronger internal and external connections; offer social, educational and outreach activities; and create development opportunities for future leaders. Membership in any group is open to all Oakies.

See below for a list and description of each of our PRGs.

Alliance Network - Provides volunteer opportunities and service events to the local communities that Oak Street Health serves. Its goal is to cultivate an environment of camaraderie among team members, while also supporting patients.

Black @ OSH - Creates an inclusive environment that brings together people from a similar background with shared experiences. This PRG is a safe space to garner support and community across a group that is historically underrepresented in healthcare and corporate America.

Female Minorities in Medicine (FM²) -

Promotes opportunities for education, networking, leadership and mentorship within the medical/healthcare field. This group aims to provide the resources needed to successfully pursue development through female racial minority empowerment.

Global and Multicultural PRG (GMP) - Works to increase awareness, cultivate inclusiveness, provide belonging, and empowerment to multicultural Oakies and our patient community.

LGBTQIA+ PRG - Focuses on the needs of our LGBTQIA+ patients and staff. This group believes Oak Street Health should be a preferred and desired place to work, and a preferred place to receive primary care for Medicare-eligible adults.

Military and Veteran PRG - Fosters a military/veteran-friendly environment at Oak Street Health, while creating development opportunities and a network for anyone interested in supporting or learning about working with military personnel.

Parent's PRG - Creates a forum for Oak Street Health parents to share experiences and struggles, discuss balance, and support each other. The group shares best practices for being successful in your career while also being a parent.

Women's PRG - Cultivates a gender-inclusive environment - both at Oak Street Health and in the greater community - where all individuals are valued for their talents and empowered to reach their fullest potential.

Additionally, our RubiconMD team members have the following PRGs: Women @ Rubicon, Black @ Rubicon and Mental Health @ Rubicon.

People Resource Groups at Oak Street (Cont.).

Our PRGs made a huge impact last year, welcoming over 500 new members and hosting over 50 events - many of which were in collaboration with each other!

Additionally, the PRG leadership team identified and made progress in areas such as increased member engagement, internal and external communication, leadership development and senior leader championship and sponsorship.

Below are just a few examples of events and initiatives hosted by our PRGs in 2022.

Example of Events and Activities	Membership Total		
■ Back to School Drive	129		
Grateful Giving Drive			
 Leadership Spotlight Discussions 	205		
■ Culture Corner			
Leading Ladies Speaker Series	214		
Microaggressions in the Workplace Workshop			
■ Oaky Recipe Book	90		
■ Diwali Festival of Lights			
■ GLMA Conference Attendance	148		
Senior Care in the LGBTQIA+ Community Panel			
■ Guest Speakers	40		
■ Toys for Tots Drive			
■ Working Parents Benefits Lunch and Learn	231		
■ Pajama Yoga			
■ Monthly Coffee Chats	401		
■ Individual Development Plan Workshop			
	 Back to School Drive Grateful Giving Drive Leadership Spotlight Discussions Culture Corner Leading Ladies Speaker Series Microaggressions in the Workplace Workshop Oaky Recipe Book Diwali Festival of Lights GLMA Conference Attendance Senior Care in the LGBTQIA+ Community Panel Guest Speakers Toys for Tots Drive Working Parents Benefits Lunch and Learn Pajama Yoga Monthly Coffee Chats 		

Diversity Data for Oak Street Team



Executive Summary for Workforce Data

The following pages include detailed data on the diversity of the Oak Street Health team.

The data presented in this report demonstrates that Oak Street Health's overall workforce continues to increase as it relates to diverse representation: 3% increase in Female representation and 6% increase among people of color.

Our provider team continues to be very diverse and we have taken intentional steps towards our goal of building a diverse, values-aligned group of providers by implementing a new Nurse Practitioner Fellowship to drive clinical excellence (see page 28). Diversity among our provider team helps us take great care of the diverse patient population that we serve.

We have continued to make progress towards diversity in leadership at Oak Street - the percent of people of color increased by 15% for our Treehouse Managers and above in 2022. This is a reflection of our commitment to increasing diversity in our recruitment and hiring processes. At the same time, we recognized that we still have room for further improvement.

You are encouraged to review the data on the following pages for yourself.

A few items to note:

- Data is for all Oak Street Health team members as of December 31, 2022; only those who have chosen to report this information are included in the data.
- Each category includes year-over-year comparisons from 2021 to 2022; this is to help illustrate the changes to our workforce over time. Some categories also include comparisons to benchmark representation data in the US. These benchmarks are to put our data into a broader context.
- The data in this report is rounded to the nearest tenth (therefore, some totals may not add up to 100%).
- Ethnicity reflects the EEO-1 categories required by the U.S. government reports.
- Interns are excluded from analysis.

Role categories captured in the report:

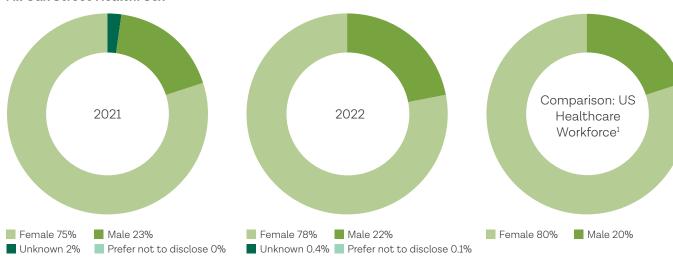
- All Oak Street Health
- Providers
- Managers
- Oak Street Health Leadership
- Oak Street Health Leadership Development Programs

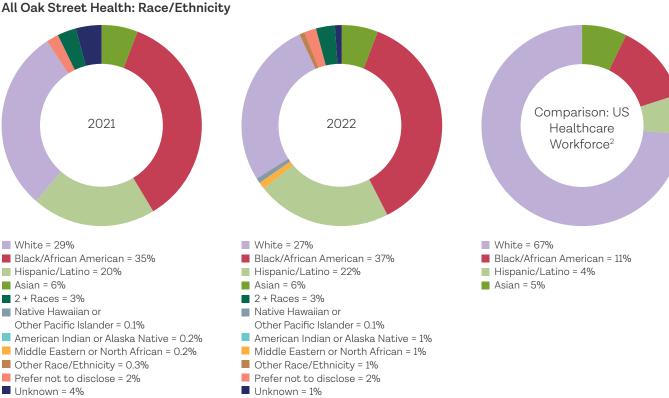
All Oak Street Health

Total workforce headcount: 2021 - 3,822 | 2022 - 5,510

- The Oak Street Health team is racially/ethnically diverse: 37% of the Oak Street team identifies as Black or African American, 22% as Hispanic or Latino, 6% as Asian, and 27% as White. This diversity continues to be reflective of the communities we serve.
- From 2021 to 2022, there was an overall increase in Female representation by 3%.
- Our overall workforce continues to be more diverse than the Healthcare/Hospital Industry overall.

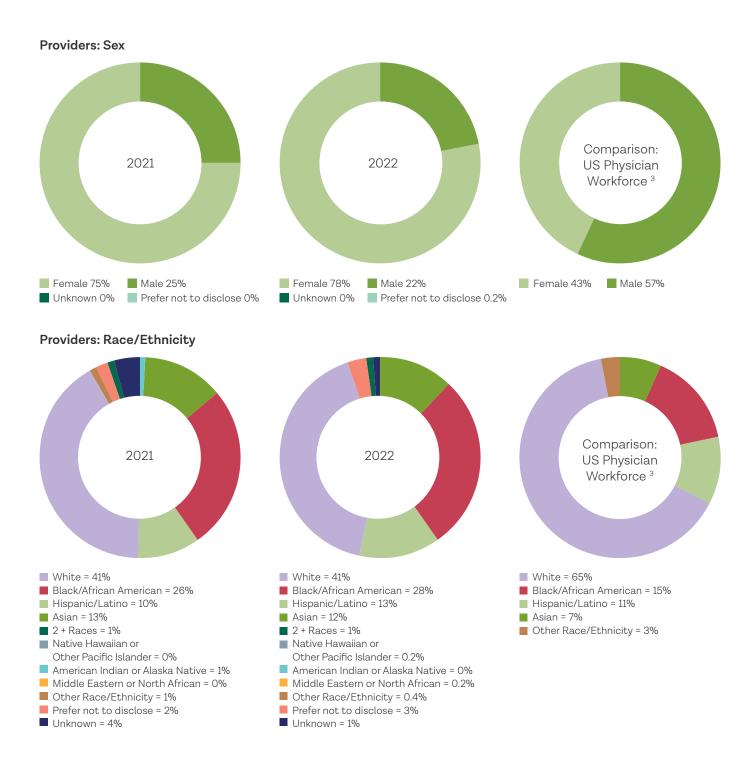






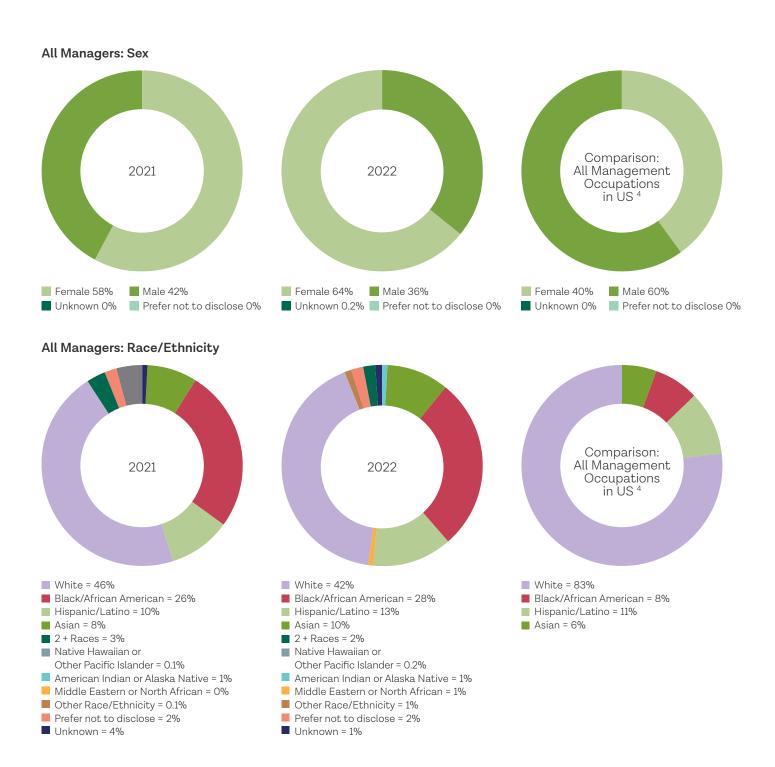
Providers

- Research demonstrates that race/ethnicity concordance between patients and providers significantly increases the likelihood of seeking preventative care, ongoing visits, communication and trust-building.
- The Oak Street provider team remains very diverse: 78% Female (+3% from 2021) and 55% people of color.
- This continues to compare favorably to the overall US Physician Workforce.



Managers

- Among all of the Manager cohorts at Oak Street, there was an 6% increase in Female representation from 2021 to 2022.
- Our management group continued to grow more racially/ethnically diverse in 2022 Black or African American (+2%), Hispanic or Latino (+3%) and Asian (+2%).
- We aim to enhance diversity among our this group through a continued focus on hiring, retention and promotion.



Oak Street Health Leadership

- We continue to focus on increasing diversity at our leadership levels though promotions and career development opportunities.
- Representation among Female Oakies has increased significantly among our Center Leaders (+17%) and Regional Executives (+11%). See appendix for 2021 vs 2022 comparisons.
- In 2023, we will further target representation through a multi-pronged talent planning approach.

Oak Street Health Leadership: Sex, 2022

Female	Male
76%	24%
60%	40%
60%	40%
60%	39%
55%	45%
70%	30%
70%	30%
63%	37%
42%	58%
	76% 60% 60% 60% 55% 70% 70%

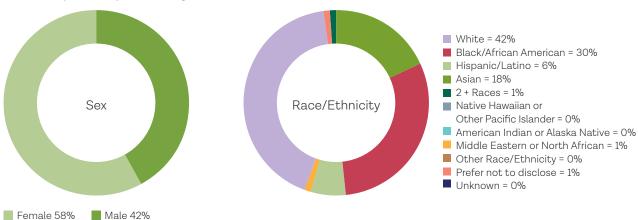
Oak Street Health Leadership: Race/Ethnicity, 2022

	White	Black/ African American	Hispanic/ Latino	Asian	2 + Races	Native Hawaiian or Other Pacific Islander	American Indian or Alaska Native	Middle Eastern or North African	Other Race/ Ethnicity	Prefer not to disclose	Unknown
Center Leaders (PM, OD, Med Dir)	31%	36%	19%	7%	2%	0.3%	1%	1%	1%	1%	1%
Regional Execs (RVP, Sr RVP, SMD, RMD)	48%	14%	8%	16%	4%	0%	2%	0%	2%	2%	4%
Other Regional Leaders (see the terms and definitions for included roles)	38%	32%	15%	10%	3%	1%	0%	1%	0%	0%	1%
Treehouse Managers	47%	17%	11%	17%	2%	1%	2%	0%	0%	2%	2%
Treehouse Directors and VP+	65%	10%	5%	14%	2%	0%	1%	1%	1%	3%	0%
PXSO Managers	25%	52%	11%	7%	0%	0%	0%	0%	0%	0%	5%
PXSO Directors and VP+	60%	10%	0%	10%	0%	0%	0%	10%	0%	10%	0%
All Medical Directors (Med Dir, SMD, RMD, EMD)	43%	21%	11%	14%	1%	0%	1%	0%	2%	4%	3%
Executive Committee	67%	8%	0%	19%	3%	0%	0%	0%	3%	0%	0%

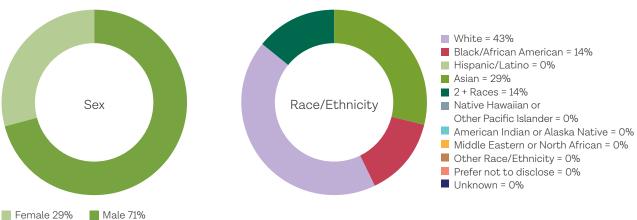
Oak Street Health Leadership Development Programs

- There are three formal leadership development programs at Oak Street Health -- the <u>Leadership Development Program</u> focused on developing operational, outreach and population health leaders; the <u>Fellowship for Value-Based Care Delivery</u>, focused on clinical leaders; and the <u>Nurse Practitioner (NP) Fellowship in Adult Primary Care</u>, which provides recent graduates with an integrative transition to valued-based practice.
- These programs help us to develop and maintain diverse cohorts of future Oak Street leaders.

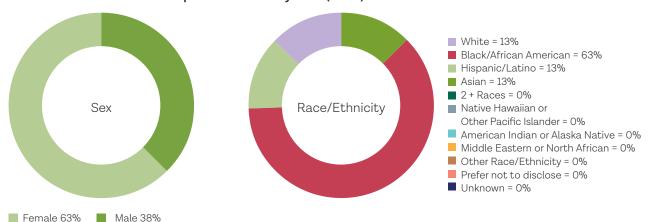
Leadership Development Program (2022)



Fellowship for Value-Based Care Delivery (2022)



Nurse Practitioner Fellowship in Adult Primary Care (2022)



Spotlight: Nurse Practitioner Fellowship

In September 2022, Oak Street Health launched a new graduate NP Fellowship in Adult Primary Care in collaboration with the University of Michigan School of Nursing. The 12-month program provides an integrative transition to valued-based practice, and empowers nurse practitioners to deliver measurably better health in under-resourced communities.



From left to right

Darrell Tuck, AGNP; Carline Uwajeh, AGNP; Samuel Altidor, FNP; Richie Torres, AGNP; Hedy Siedarta, AGNP; Isia Atkinson, FNP; Monika DeTurk, FNP; and Marjorie Remy, FNP. FNP = Family Nurse Practitioner; AGNP = Adult Gerontology Nurse Practitioner

The NP Fellowship Program has taken intentional steps towards our goal of building an effective, diverse and value-aligned group of providers to advance our mission of Rebuilding Healthcare as it Should Be by fostering the personal and professional development of NPs to drive clinical excellence.

The program team committed at inception to incorporating DE&I into all facets of the program and fostering an environment where inclusion is essential and all individuals thrive. One way the fellowship incorporated this value is by utilizing a selection process called Holistic Review. This process considers the "whole" applicant, which includes applicants'

experiences, attributes and academic metrics as well as the value an applicant would contribute to the community that Oak Street Health serves. The selection process is designed to mitigate bias (e.g., removing identifiers such as photos, demographic information, universities and degree type), and leverages a blinded first-round interview to ensure the selection process is mission-based.

To learn more about the NP Fellowship, including how to apply to their September 2023 or March 2024 cohorts, please <u>click here</u> or contact them at <u>NPtraining@oakstreethealth.com</u>.

Terms and Definitions



Data Included

This report contains data for all 5,500+ Oak Street Health team members as of December 31, 2022. The report includes data for those who have not identified sex or race/ethnicity in Workday (approx 1.3% of our team has not entered in sex and/or race/ethnicity data) - these individuals have been categorized as "Unknown".



The following roles have been grouped accordingly for the ease of presentation.

All Providers: Physicians, Nurse Practitioners, Physician Assistants, Podiatrist, Clinical Pharmacist, and Psychiatrists.

All Managers: Includes all supervisors at Oak Street Health, defined as those with a Manager title and/or at least one direct report.

New Hires: Refers to team members who joined Oak Street Health in the past 12 months.

Promotions: Refers to all team members who had a title increase in the past 12 months.

Leadership Development Programs: Includes participants in the Fellowship for Value-Based Care Delivery, Leadership Development Program, and Nurse Practitioner Fellowship Program.

Center and Regional Leadership:

Center Leaders: Center level leadership, including Practice Managers and Senior Practice Managers; Outreach Directors and Senior Outreach Directors; Medical Directors; and other center-based supervisors.

All Medical Directors: Includes everyone with a Medical Director title (Medical Director, Senior Medical Director, Regional Medical Director, Executive Medical Director, specific program Medical Directors).



Regional Executives (RVP/SMD): Regional leadership dyad of Regional Vice Presidents and Senior Medical Directors.

Divisional Executives (DP/EMD): Divisional leadership dyad of Divisional Presidents and Executive Medical Directors.

Other Regional and Divisional Leaders: Regional and Divisional leadership roles such as Regional Growth Director, Regional Director of Operations, Population Health Director, Senior Patient Relations Manager, Senior Clinical Informatics Specialist, and other regional and divisional supervisors.

Treehouse and Contact Center Leadership:

Managers: Leaders with Manager, Senior Manager or Supervisor titles.

Directors: Leaders with Director or Senior Director titles.

Treehouse Executives (VP+): Leaders with Vice President, Senior Vice President or C-level titles.

Executive Committee: Senior Vice President, Division President, Executive Medical Director and C-level titles.

Patient Experience and Service Operations (PXSO):

Contact Center Service, Contact Center Sales, Service Support, Referral Processing Services, Medical Records, Triage Nurse and Pharmacy Tech Operations.

Demographic Data

Race/Ethnicity data reflects the EEO-1 categories as required by the US government. The data in this report is all self-reported in Workday. This information is initially completed at the time of hire, but can be updated at any time.

Sex (listed as Gender in Workday):

- Male
- Female
- Decline to Identify

Note: As stated in the "DE&I Progress in Action" section, we have started to collect data on Gender Identity, Sexual Orientation, Disability, Parent/Caretaker Status and Military Status via a Self-ID campaign. This data will be shared in future reports.

Race/Ethnicity:

- American Indian/Alaska Native
- Asian
- Black or African American
- Middle Eastern/North Africa
- Native Hawaiian or other Pacific Islander
- Hispanic or Latino
- Two or more races
- White
- Prefer not to disclose
- Other (self identified)

Note: Individuals who self-selected more than one race were recorded as Two or more races; if an individual self-selected Hispanic or Latino, they were recorded as such, regardless of other races selected.

¹PWC Saratoga Benchmarking Data - 2021 Healthcare/Hospital Industry

² PWC Saratoga Benchmarking Data - 2021 Healthcare/Hospital Industry

³ American Association of Medical Colleges - Diversity in Medicine: Facts and Figures 2019 https://www.aamc.org/data-reports/workforce/report/diversity-medicine-facts-and-figures-2019

⁴ US Bureau of Labor Statistics – Characteristics of the Employed. 2020 Data for "Management Occupations". https://www.bls.gov/cps/tables.htm#charemp