



A COMMITMENT TO OUR

People --- Community --- Environment

Corporate Social Responsibility 2018



Corporate Social Responsibility

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Our commitment to our people has resulted in being recognized with workplace awards by various organizations and media publications throughout the U.S.

We pride ourselves on being diverse organization that builds long-lasting relationships with and provides support for our communities, as well as national organizations.

2018 National Awards



Workplace Awards 2014-2018



13

Workplace Awards

in 2014



23

Workplace Awards

in 2015



34

Workplace Awards

in 2016



50

Workplace Awards

in 2017



52

Workplace Awards

in 2018

Our Company

Culture

Mission Statement

To provide exceptional advice and solutions that help our clients achieve their goals

Vision Statement

To be recognized by our clients as the premier provider of accounting, insurance and other professional business services and by our team members as their employer of choice

Core Values

We do the right thing.

Our people matter.

We are dedicated to the success of our clients.

We expect to win.

We are One CBIZ.

Service Promise

Quality, Attentive, Responsive Business Services

We pledge to provide quality, attentive, responsive business services.

Individual Attention: We will treat each client with the utmost care; we will develop and maintain a strong personal relationship; we will provide service with a commitment to professionalism, trust and the highest level of personal and professional integrity.

Responsive: We will respond to a client's urgent need immediately; we will return all voicemail and e-mail communications within 24 hours; we will deliver and review all work product on a timely and as agreed basis.

Proactive: We are committed to understanding the goals and needs of our clients, responding to such needs with our best service, advice and products. We will strive to provide our clients with innovative solutions and opportunities to improve and grow their business.

Our guarantee:

If you are not satisfied with our **responsiveness and the service** we have provided, tell us immediately – we will correct the situation to your satisfaction.

Ethics

Professional Conduct and Ethics

The success of CBIZ is directly tied to our reputation for integrity in the marketplace. We earn loyalty and trust because we are honest, dependable, reliable and responsible. We adhere to the highest ethical standards, more than merely required by law or expected by others, because it is the right thing to do and makes good business sense. We take great pride in our reputation for integrity.

Simply stated, we act with integrity by incorporating the values of honesty, fairness, respect, loyalty and cooperation into all our business decisions and actions.

Our Core Values serve as the foundation for the following ethical business principles:

- We treat people with dignity and care.
- We transact business fairly and honestly, promoting the Company's best interests, without regard to our personal interests.
- We safeguard all the Company's property and information and treat others' property and information with the same respect.
- We work to enhance the quality of life in the communities we serve.
- We comply with the law.

To help guide team members to make the best possible decisions, CBIZ has created a Code of Professional Conduct and Ethics Guide. Although this is not a detailed manual for resolving every question or conflict, the Code of Professional Conduct and Ethics Guide has been designed to provide useful guidance about the way associates are to do business every day. It is the responsibility of our team members to read and understand the Code, as well as other CBIZ policies and guidelines, and comply with them both in letter and spirit. [Click here](#) to view full Code of Professional Conduct and Ethics.



Governance

Board of Directors

Please [click here](#) for more information on our Board of Directors, pictured below.



As a publicly traded company, it is CBIZ's goal to conduct our business in a manner that will maintain and improve our good reputation. In order to foster this goal, and to provide shareholders with more information regarding the means by which we hope to achieve our goal, CBIZ has made the following charters available: [Audit Committee](#), [Compensation and Human Capital Committee](#), and our [Nominating and Governance Committee](#).



Whistle Blower Hotline

The CBIZ Employee Ethics Hotline is available 24 hours a day, seven days a week. CBIZ associates may choose to remain anonymous when calling the hotline and any employee who reports possible or actual wrongdoing in good faith will not be retaliated against if they choose to share their identity. Associates may report a complaint by calling 1-866-255-2611 or by visiting the Security Voice website at www.securityvoice.com/reports. The CBIZ Internal Audit Department will provide the Audit Committee with a report of all complaints received and the results of its investigation.



Terms of Use & Privacy

[Terms of Use & Privacy Policy](#)

[Website Privacy Policy](#)

Our People Matter

“Our People Matter” is one of our five Core Values. We pledge to:

- Commit to the personal and professional growth of our team members.
- Respect individuality and diversity and extend dignity to all.
- Value and recognize the hard work, effort and contributions of our team members.
- Support the communities in which our team members live and work.
- Understand the importance of balance among our personal, community and professional lives.

As such, the overall wellbeing of our team members is critically important to us; therefore, we advocate a wellbeing philosophy focused on five key areas: purpose, social, financial, community and physical.



Pillars of Wellbeing



Purpose

Liking what we do each day and being motivated to achieve our goals



Social

Having a strong sense of community at work as well as supportive relationships and love in our lives



Financial

Effectively managing our economic life to reduce stress and increase security



Community

The sense of engagement and involvement we have with the area where we live



Physical

Striving for optimal health and enough energy to get things done on a daily basis

Workplace Awards

Our commitment to our people has resulted in being recognized with workplace awards by various organizations and media publications throughout the U.S.



8 National Workplaces

Best Workplaces for Consulting and Professional Services

2018 Workplace Excellence Seal of Approval

2018 Best Workplaces for Millennials

2018 America's Best Mid-Size Employers

Best Places to Work in Insurance 2018

2018 Top Entry-Level Employer

2018 Top Intern Employer

2018 Best and Brightest Companies to Work For in the Nation



2 National Health and Wellness

2018 Health & Wellness Seal of Approval

2018 Best & Brightest Companies in Wellness



8 Certifications and Rankings

Great Place to Work Certification

Vault Accounting 50

Vault Best Accounting Internships

Vault Best Consulting Internships

Most Prestigious Accounting Firms

Best Accounting Firms for Forensic Accounting

Best Accounting Firms for Tax Accounting

Best Practices for Supporting Workers 50+



3 Credibility

Top 100 Retirement Plan Advisers

Top RIA Aggregators

2018 NAPA Top Defined Contribution Multi-Office Firm



9 Local Health and Wellness

Greater Atlanta, GA

Cumberland, MD

Greater Kansas City

Central Ohio

Phoenix, AZ

Providence, RI

San Jose, CA

South Florida

Winston-Salem, NC



22 Local Office Workplaces

Greater Atlanta, GA
Boca Raton, FL
Boston, MA
Greater Chicago, IL*

Irvine, CA
Kansas City, MO
Lewiston, ID
Maryland Hts., MO

Northeast Ohio*
Overland Park, KS
Oxnard, CA
Phoenix, AZ*

Providence, RI*
Tucson, AZ
San Diego, CA

Northern California
Tampa Bay, FL*
Torrance, CA

*Multiple award winner

Purpose

Liking what we do each day
and being motivated to
achieve our goals



Onboarding and Training Programs

All new employees are welcomed into CBIZ through onboarding, a process during which we integrate new team members into the organization, prepare them to succeed at their job and encourage them to become fully engaged, productive members of the company. We provide access to opportunities which allow our associates to further develop their talents and abilities.

For detailed information about content and types of training, please refer to our [Enterprise-Wide Training Brochure](#).



Steven L. Gerard Legacy Award

The Steven L. Gerard Legacy Award (SLG Award) was established in 2016 in honor of the tremendous impact that our former CEO has had on our company. Nowhere is his impact more evident than in the development of the values and culture we now collectively embrace.

Each year, we honor Steve's legacy by giving the SLG Award to the employee who has most exemplified one or more of our core values.

This award is designed to recognize one team member who goes above and beyond expectations. It can go to ANY current employee regardless of role, title, practice or office. The recipient will receive recognition on our intranet, a trophy for their office, and their name engraved on the permanent trophy in our corporate office in Cleveland.

Service Anniversary Program

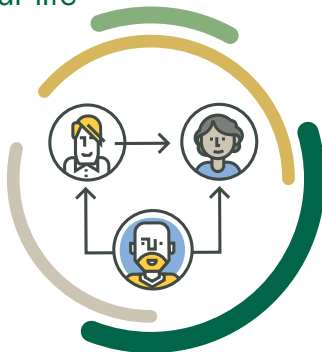
Our Service Anniversary Program is designed to recognize and celebrate our team members as they reach their milestone service anniversaries (i.e. 5, 10, 15, 20 and 25 years). The hard work and dedication of our team provide critical support to our clients and help CBIZ grow; for that, we are truly thankful.

Individual External Recognition

Our CBIZ Women's Advantage program is proud of the recognitions our professionals have received for their contributions to diversity, their professions, clients and to CBIZ. We track this and as an example, a growing number of CBIZ [professionals have been recognized](#) in their local communities.

Social

Having a strong sense of community at work as well as supportive relationships and love in our life



Our “Great People, Great Place” Program

The commitment to our people means making CBIZ a great place to work. With this philosophy in mind, we established our Great People, Great Place (GP2) program in 2006. GP2's mission is to ensure that we create a place of which our team members are proud.



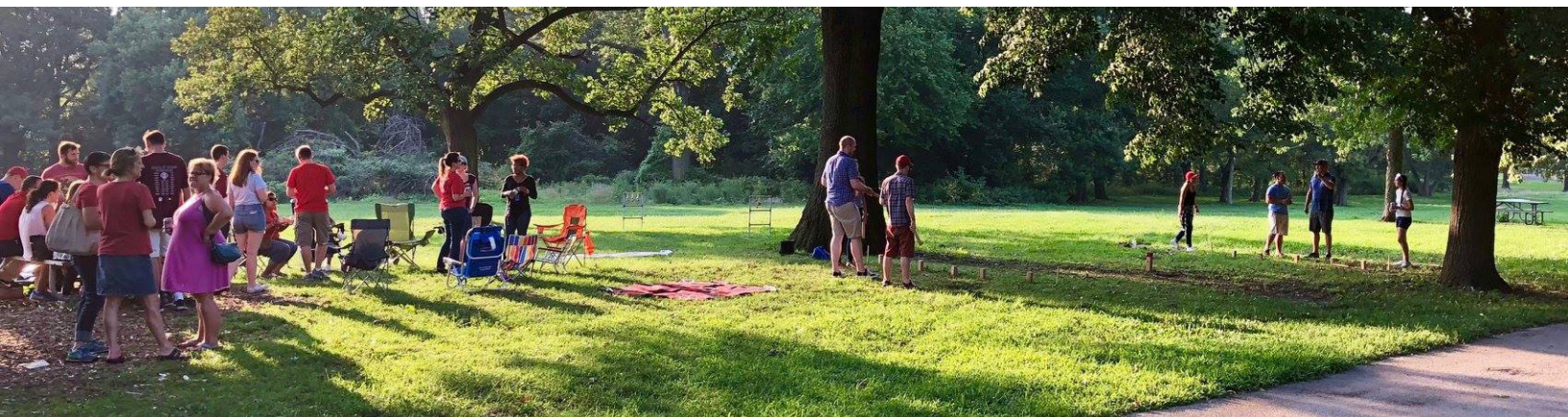
CBIZ's commitment to making our company a great place to work



Defining our company and establishing a common culture



An expression to our team members that we care



Communication

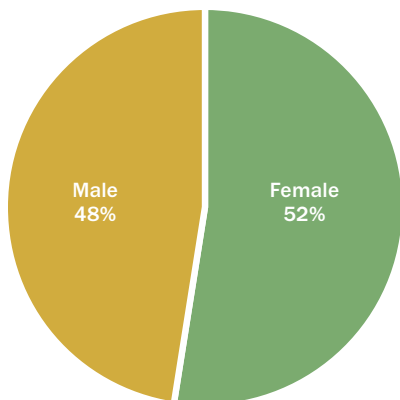
Feedback from our team members emphasizes that frequent and varied forms of communication are critical to sustaining a cohesive environment.

Our four core methods of communication are in-person meetings, our company intranet, quarterly communications and our open-door policy for suggestions.

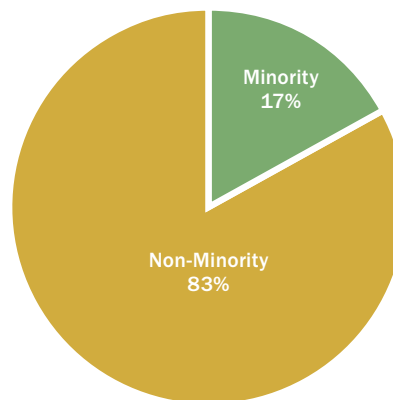
Diversity

Metrics

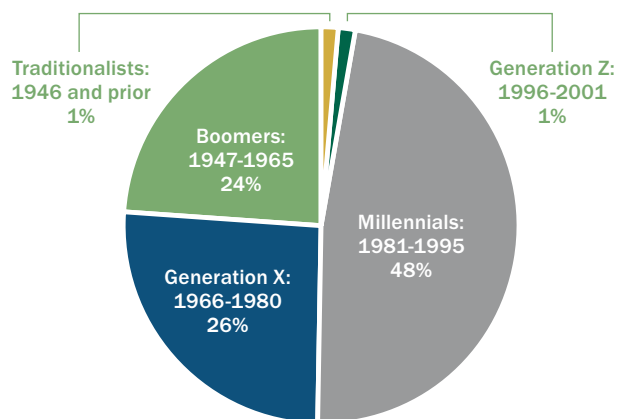
PERCENTAGE OF
TEAM MEMBERS BY GENDER



PERCENTAGE OF
TEAM MEMBERS BY ETHNICITY



PERCENTAGE OF
TEAM MEMBERS BY GENERATION



CBIZ Women's Advantage

CBIZ Women's Advantage (CWA) provides professional training, development, mentorship, recognition, and career enhancement opportunities to our professionals, and brings these same elements to our business communities through a variety of educational and networking events.

Our Goals:

- Attract, retain and engage talented women and a diverse workforce
- Provide personal, professional and business development training
- Recognize our people for their commitment to diversity, their clients, professions and to CBIZ
- Champion CBIZ's mission, vision, values and strategic goals
- Raise up the next generation of leaders
- Encourage career intention and visibility
- Support the communities in which we live and work

[Click here](#) for more information on CBIZ Women's Advantage.

Recruiting

Our National Recruiting Office (NRO) builds outreach networks to identify qualified minority, military, disabled, female or LGBT candidates.

Personal Development

All team members are required to complete one course on each of the following subjects: ethics, anti-harassment and diversity.

Benefits

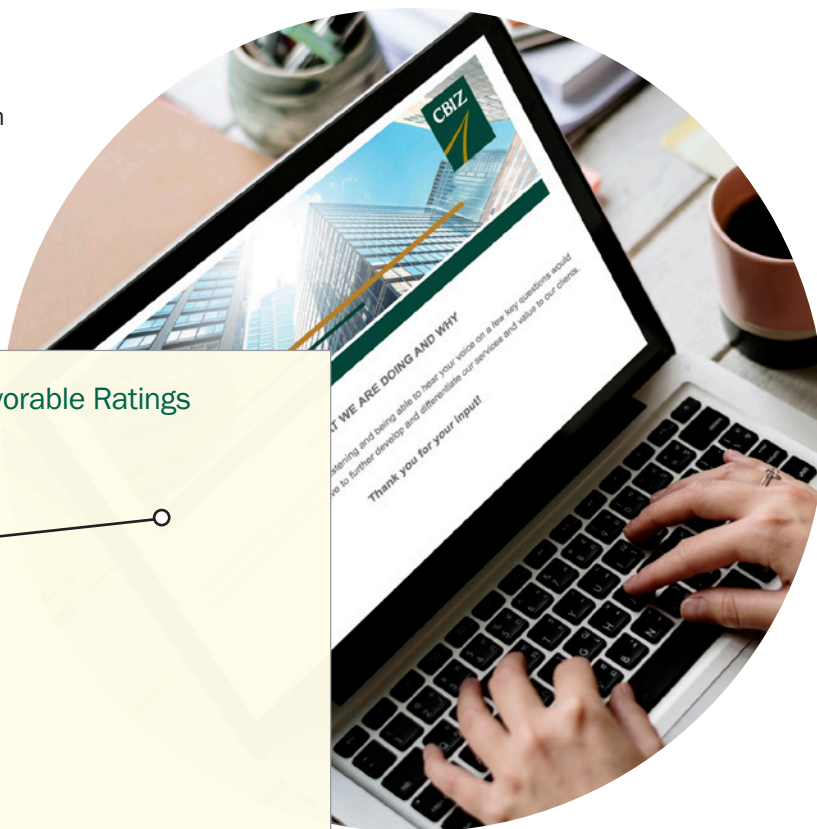
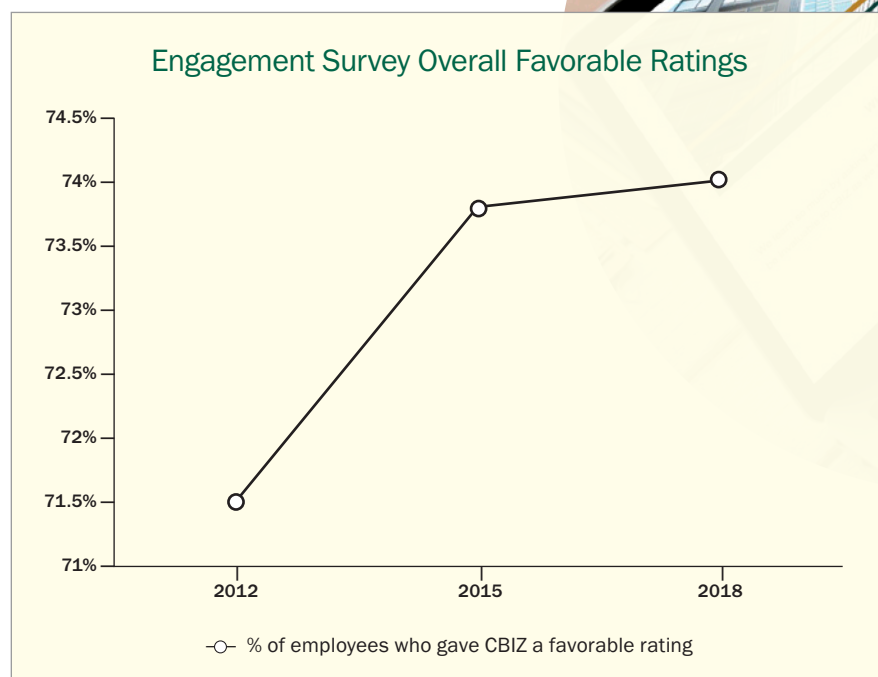
Recognizing that we have a diverse team with a variety of personal situations, CBIZ offers an array of [benefits](#) to assist with individual needs.



Engagement

Our team members' voices are important to us. Every three years, we distribute a company-wide employee engagement survey to help us gauge how we fare as an employer. The ideas expressed within the surveys by our team have resulted in establishing several new programs and policies. Among the most popular are:

- [CBIZ Women's Advantage](#)
- Domestic partner benefits
- Employee referral bonus program
- Discounted employee stock purchase plan
- [Annual CBIZ National Food Drive](#)
- Parental leave programs
- [CBIZ Cares](#)
- Flexible work arrangements



Financial

Effectively managing our economic life to reduce stress and increase security



Guiding & Rewarding Performance

Performance management is the process used by CBIZ to ensure all team members are aware of the level of performance expected in their role as well as any individual goals that are required to achieve overall organization objectives.

We also embrace a “**Pay for Performance**” philosophy, providing our team with opportunities to enhance their cash compensation through competitive merit increases as well as annual bonuses. Our compensation plans are designed to reward and incentivize professionals specific to criteria and competencies related to their role and level within the organization.

Incentives and bonuses are also awarded for achieving professional certifications, including pay for study materials, exams and compensation for time taken while taking exams.

Income Protection

CBIZ provides income protection for our team when unexpected and unfortunate circumstances arise. Included in our income protection plans are:

- Paid sick leave
- Salary continuation plan
- Group long-term disability insurance
- Group life insurance and accidental death and dismemberment benefits
- Business travel and accident insurance
- Voluntary life, dependent life, long-term care, and accident and critical illness insurance



Retirement Readiness

CBIZ offers a variety of benefits and programs to assist our team in preparing for retirement financially and emotionally. Our offerings include:

- No mandatory retirement
- 401(k)
- Matching contribution from CBIZ
- Loan opportunity
- Retirement Video Series – nine short videos addressing topics that we hope will reduce the stress and anxiety of retirement
- Financial Finesse – a platform to help evaluate an individual's financial wellbeing

Financial Perks & Programs

We are pleased to offer a number of perks and programs to help our team members' financial wellbeing. Please [click here](#) for an overview of these items.



FINANCIAL

Effectively managing
your economic life
to reduce stress and
increase security

Salary Continuation: Provides partial income per week for up to 180 days in the case of illness or accident.

Long Term Disability: Provides partial income continuation after 180-day elimination period while continuously disabled, up to normal retirement age.

Cafeteria Plan (Section 125): Provides pre-tax savings for reimbursement of medical, dental and vision expenses not covered by insurance, adoption expenses and dependent daycare expenses.

Transportation Fringe Benefit (Section 132): Provides for payment of parking expenses at or near your office or mass transit expenses on a pre-tax basis.

Retirement Plan: Employees contributing to the CBIZ retirement plan make automatic payroll deductions into investment accounts and enjoy a competitive matching contribution following one year of service.

Group Life and AD&D: Life insurance and accidental death and dismemberment benefits for your beneficiary in the case of your death or permanent injury while employed.

Voluntary Life, Accident and Critical Illness Plans: CBIZ offers Voluntary Life, Dependent Life, Long Term Care, Accident and Critical Illness Insurance.

Travel and Accident Insurance: Personal insurance coverage available while traveling on authorized company business.

Employee Stock Purchase Plan: Employees can purchase CBIZ stock at a discounted price through the convenience of payroll deduction.

Affac: Affac's supplemental insurance policies pay cash benefits directly to you, unless otherwise assigned, regardless of any other insurance you may have. You can use the cash benefits to help pay for expenses that aren't covered by your major medical insurance.

LifeLock: LifeLock consistently scans for use of members' personal information, monitors for the opening of new accounts and searches criminal websites that sell stolen data. If suspicious activity is detected, they immediately alert the member and take action to stop thieves before they have a chance to commit fraud.

Personal Insurance Services: Professionals that review your existing policies, provide recommendations for improving coverage where applicable (while often times improving your rates) and offer you peace of mind knowing you are adequately insured.

Physical

Striving for optimal health and enough energy to get things done on a daily basis



Elements of Physical Wellbeing

Since 2001 we have sponsored programs to assist our employees and their spouses/domestic partners to take action to achieve good health. Our programs offer a platform of support as well as tools and resources for employees to move forward, regardless of where they may be on the spectrum of personal health.



Employee Benefits

CBIZ offers medical, dental and vision coverage. Each of these benefits is designed to focus attention on maintaining or improving overall health. Please [click here](#) to see an overview of our benefits.



Rally Wellness

Rally Health is a wellness program hosted on our insurance provider's website that tracks our personal scorecards, health risk assessments, biometric screenings and premium discounts. Through Rally, we provide free access to telephonic wellness coaching programs on a variety of health-related topics. Points earned through Rally also contribute to a discount on our team members' health insurance.



Employee Assistance Program

For mental health, our Employee Assistance Program provides access to short-term counseling for our associates and their dependents to help manage challenges at home and in the workplace.

Our Community

We pride ourselves on being a diverse organization that builds long-lasting relationships with and provides support for the communities in which we live and work, as well as national organizations. To fulfill this commitment, we launched our CBIZ Cares Program to encourage participation in volunteering, fundraising, our National Food Drive, our support of Dress for Success, and our Green Team.



In our
first two years
of CBIZ Cares, we volunteered
nearly
15,000 hours
in our communities.



Volunteering

In honor of CBIZ's 20th anniversary in 2016, we wanted to give back to the communities in which we live and work. We embarked on a project we named CBIZ Cares and encouraged all of our offices to have their team members volunteer up to five paid hours at a nonprofit organization selected by that CBIZ location. CBIZ Cares was such a success that we decided to make it an annual initiative!

The program remains the same in that each local team volunteers at an organization (or multiple organizations for our larger offices) of their choice. A CBIZ Cares leader for each location identifies and selects volunteering opportunities with nonprofits and subsequently organizes CBIZ team members to participate in the project.



We exceeded our \$50,000 goal and, with a corporate donation from CBIZ, **we donated more than \$78,500** to the American Red Cross for Hurricane Harvey relief efforts.

Fundraising

We also support fundraising initiatives such as hosting a local charitable campaign, providing funding for a CBIZ team to participate in a walk/race benefiting a nonprofit, etc.

As needs arise, we host other campaigns to help those in need. In 2017 we held a donation drive to benefit the Hurricane Harvey relief fund supported by the American Red Cross.

Since 2009,
we have donated
**more than 7 million
pounds of food**
around the country.

National Food Drive

Another key element of CBIZ Cares is our annual CBIZ National Food Drive, which was established in 2009. During this two-week event each fall, we ask our team members for monetary or non-perishable food donations to provide to their local food bank.

We make the Food Drive fun by sponsoring a friendly competition between offices. Each office is categorized by employee count and the top two offices in each category receive a prize based on the greatest amount of food and monetary donations, as measured by the total pounds collected divided by employee count.



CBIZ Women's Advantage & Dress for Success

In partnership with our CBIZ Women's Advantage program, we sponsor an annual campaign to benefit Dress for Success (DFS). DFS is a non-profit organization that provides professional attire for job interviewing, career/life counseling, technology training and mentoring support to thousands of disadvantaged women each year.



Participating CBIZ offices have local committees to develop creative campaigns for fundraising.

In recent years, we began collecting travel-size toiletry items to make hygiene bags that are given to women as they receive their wardrobe from DFS. In 2017, we greatly increased our efforts to make bags to help the DFS affiliates in Texas as they were significantly impacted by Hurricane Harvey.

Please [click here](#) for an infographic that further details our involvement with Dress for Success.



Since 2008, we have
donated 58,000
 clothing or accessory items
 and more than
\$545,000 to DFS
 affiliates nationwide.

Our Environment

Green Team

We also care about being [environmentally friendly](#). In 2018, we renewed our commitment to our green initiatives and launched a national Green Team, comprised of volunteers from across CBIZ who are passionate about enhancing our green efforts. Our goal is to establish practical and actionable solutions to support sustainable environments within each of our local offices.

We value:

- Reducing our environmental footprint
- Efficiently using resources to reduce waste
- Making green choices

We endeavor to do this because our associates care about working in a great place that values:

- Restoring and protecting our environment.
- Using resources efficiently while reducing waste.
- Opportunities for making green choices





At CBIZ, our commitment to corporate social responsibility ties directly to our mission, vision and values. We are committed to being an employer of choice and a place where our team members are proud to work, focused on being a premier provider of exceptional advice and solutions to our clients, and being good stewards of the communities in which we live and work. We are vigilant in our efforts to understand the needs of all our constituents and to do our best to address those needs. Our core values guide our actions and decisions to be in the best interest of our [people](#), [community](#) and [environment](#).

