



Office of the Minnesota Secretary of State
Minnesota Public Benefit Corporation / Annual Benefit Report
Minnesota Statutes, Chapter 304A



Read the instructions before completing this form
 Must be filed by March 31
 Filing Fee: \$55 for expedited service in-person, \$35 if submitted by mail

The Annual Benefit Report covers the 12 month period ending on December 31 of the previous year.
 Notice: Failure to file this form by March 31 of this year will result in the revocation of the corporation's public benefit status without further notice from the Secretary of State, pursuant to Minnesota Statutes, Section 304A.301

1. File Number 9L-996
2. Corporate Name: (Required) Professional Data Analysts, GBC
3. The public benefit corporation's board of directors has reviewed and approved this report.
4. In the field below, enter the information required by section 304A.301 subd. 2 or 3 for the period covered by this report, (see instructions for further information): Note: Use additional sheets if needed. (Required)

See attached

5. I, the undersigned, certify that I am the chief executive officer of this public benefit corporation. I further certify that I have signed this document no more than 30 days before the document is delivered to the secretary of state for filing, and that this document is current when signed. I further certify that I have completed all required fields, and that the information in this document is true and correct and in compliance with the applicable chapter of Minnesota Statutes. I understand that by signing this document I am subject to the penalties of perjury as set forth in Section 609.48 as if I had signed this document under oath.

[Signature]
 Signature of Public Benefit Corporation's Chief Executive Officer

3-13-2024

Date (Must be dated within 30 days before the report is delivered to the Secretary of State for Filing)

Email Address for Official Notices

Enter an email address to which the Secretary of State can forward official notices required by law and other notices:

operations@pdastats.com

Check here to have your email address excluded from requests for bulk data, to the extent allowed by Minnesota law.

List a name and daytime phone number of a person who can be contacted about this form:

Kelly Laurel

612-254-6033

Contact Name

Phone Number

Entities that own, lease, or have any financial interest in agricultural land or land capable of being farmed must register with the MN Dept. of Agriculture's Corporate Farm Program.

Does this entity own, lease, or have any financial interest in agricultural land or land capable of being farmed?
 Yes No

Public Benefit Corporation Report

2023 Activities



Prepared for
Minnesota Secretary of State

Prepared by
Professional Data Analysts



Professional
Data Analysts

WHO WE ARE

OUR MISSION

To create positive social impact by providing tailored data-centric solutions that move public health initiatives forward.

OUR VALUES

BE CURIOUS.

Encourage innovation, challenge assumptions, and create a culture of shared learning and continuous improvement.

DO GOOD.

Support our community, reduce our environmental impact, and provide opportunities for others to thrive.

EXCEL TOGETHER.

Work with each other and our clients to deliver insights and solutions that exceed expectations.

INSPIRE DATA EXCITEMENT.

Use data to create meaning and serve as a catalyst for action.

MAKE AN IMPACT.

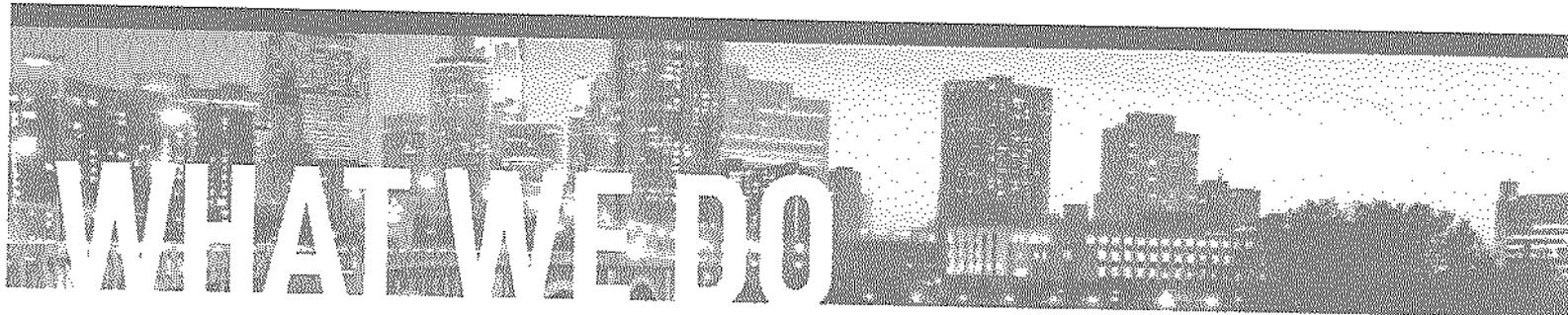
Strengthen communities with equitable and effective data-centric solutions.

OUR TEAM

We're a team of passionate, driven, and creative individuals from a variety of backgrounds united by a common desire to improve communities with sound and effective data-centric solutions. We have expertise in public health initiatives including tobacco cessation, cancer control, chronic disease prevention, and youth development programs.

OUR CULTURE

We strive for impact, putting our knowledge and resources where we can make the most difference to our clients and in our communities. Curiosity and thirst for knowledge drive our culture of continuous improvement and inspire us to go above and beyond for our clients.



WHAT WE DO

OUR WORK

We transform data into actionable insights, in partnership and through shared learning with our clients. We support health, wellness, and community initiatives through independent program evaluation, research, statistical consulting, and custom web development. We use data to create meaning and serve as a catalyst for action.

OUR COMMITMENT



As a Public Benefit Corporation in Minnesota and a Certified B Corporation, we are committed to considering the needs of all stakeholders. Our commitment to clients is objective, high quality data and innovative, cost-effective solutions. We provide a balanced work environment for staff that encourages professional growth, continual learning, teamwork, and healthy living. We support our local community through service and financial backing while reducing our environmental impact through carbon neutrality, near sourcing, and extensive recycling efforts. We are proud to be part of a global community using business as a force for good.

TESTIMONIALS

“ Florida’s successful tobacco cessation program was built on data and PDA’s evaluation recommendations. Florida found by including PDA during the planning process of evidence-based interventions, measurement became an important component of any new initiative. The collaboration between PDA and Florida resulted in Florida’s robust array of cessation services provided by Tobacco Free Florida.

—Jane Parker, Tobacco Free Florida’s retired Tobacco Cessation Manager

“ I have worked with PDA for nearly four years and have been consistently impressed with their customer relations and the level of professionalism within their organization. Our contract, though small in scale to others, is well-managed and always treated as a high priority among project staff. The work that PDA does for our project has been an essential component for improving the quality and delivery of services, and we value the time that the staff at PDA have spent to go above and beyond to ensure that they are meeting our needs.

—Brianna Longeway, MPH, Community Tobacco Treatment Coordinator | Minnesota Department of Health

“ The team of evaluators at PDA has in-depth expertise in both quantitative and qualitative methods and provides added value at every step of the evaluation process. They are particularly skillful at anticipating clients’ needs and proactively raising issues. We have found this level of forward-thinking to be crucial in implementing quality evaluations with high levels of respondent participation.

—Barbara A. Schillo, Ph.D., Vice President, ClearWay



March 4, 2024

Millie Cardinal
Business Analyst
Office of Minnesota Secretary of State, Steve Simon
60 Empire Drive, Suite 100
St. Paul, MN 55103

Dear Ms. Cardinal,

Professional Data Analysts, GBC (PDA) is dedicated to helping health initiatives succeed by offering our clients sound, effective data-centric solutions. As a Certified B Corporation, we are also committed to positively impacting our staff, vendors, community, and the environment.

PDA became a General Benefit Corporation in April 2019 to better align with our mission of creating positive social impact. Not long after, PDA became a Certified B Corporation™. Our board of directors chose to use the B Corp certification because the assessment examines the overall positive impact of a company, including all stakeholders. This aligns well with the mission and values of PDA. Additionally, the certification offers third-party validation, public transparency, and legal accountability. We determined that B Lab™, the nonprofit that administers the B Corp Certification, is independent.

2023 marks our fourth year using the B Corporation assessment as a benchmark for our success in creating a public benefit. We renewed our certification this year with a score of 113.9, well above the 80 points required for certification. The standard was applied in a manner consistent with the application in our previous report.

We are pleased to present this report detailing the benefits created and challenges faced in 2023. Please feel free to contact me with questions.

A handwritten signature in black ink, appearing to read 'Harlan Luxenberg'.

Harlan Luxenberg
President & CEO
612-623-9110

Introduction

Professional Data Analysts, GBC (PDA) provides program evaluation, statistical consulting, and custom web development services to move public health initiatives forward. We are headquartered in Minneapolis, Minnesota, and work in several states across the US.

Throughout 2023, PDA worked to create positive social impact for our staff, clients, community, and the environment.

Staff

PDA strives to foster an inclusive environment where every individual has the resources and opportunities they need to grow, thrive, and succeed. We offer exceptional benefits, a casual and flexible work environment, and professional development opportunities. We also pay all employees at least the living wage for a family. In 2023, we strengthened our support for staff in a few key ways.



Staff Connection

One focus for the year was helping all staff feel connected to one another. In June, we invited all our remote staff to Minneapolis for a few days of fun, connection, and learning. It was wonderful to have all our staff together for the first time since early 2020! Staff engaged in a variety of activities to get to know each other better and enjoy the beauty of Minnesota in the summertime.

Throughout the year, we supported staff connection through in-office lunches and ping pong games, walks, and virtual game breaks. We also increased the frequency of our staff newsletters, which we use to share company and project updates, highlight accomplishments, and introduce new staff.

Improved Insurance

PDA made a large investment in staff benefits in 2023. We moved from offering one health insurance plan to two. This was based on staff feedback that our current plan was a barrier for seeking mental health treatment. The new plan includes a copay, making office visits more affordable. Additionally, PDA began paying 100% of full-time employee health and dental insurance premiums and 50% of the premiums for dependents. We also began offering health insurance to part-time staff and optional vision insurance and supplemental life insurance to full-time staff.

New retirement plan

In January 2023, we ended our SIMPLE IRA plan and launched a 401(k) plan that includes sustainable investment options. We partner with Carbon Collective, which offers portfolios that invest in solving climate change, along with traditional portfolio options. In moving from a SIMPLE IRA to a 401(k), PDA increased the company match from 3% to 4%, further supporting staff in their retirement goals.

Mental Health Support

Our Mental Health and Wellbeing Committee, which was formed in 2022, continued planning events to support staff mental health this year. This included a focused two-week period in March with events ranging from virtual bingo to a mindfulness session to an open conversation about therapy. The focused period ended with two days off for all staff. This allowed staff to take time for themselves to do any activities that best support their mental health and wellbeing. Staff reported feeling less guilty about completely unplugging during that time because their co-workers were off as well.

The committee also planned events throughout the year, such as outdoor walks, online games, and modeling clay projects to encourage staff to take breaks from work.



Conferences and Professional Development

In 2023, our staff attended national conferences, participated in virtual professional development opportunities, and engaged in client site visits. Our team was well represented at the American Evaluation Association conference in Indianapolis. Several staff members gave a presentation or presented a poster to foster their own professional development and share our work with others in our field. Additionally, our staff visited Florida, Hawaii, Vermont, Ohio, Indiana, and North Dakota to better engage with clients.

Challenges: With a renewed focus on staff connection in a post-pandemic world, we were challenged to find ways to support and connect with our remote staff. Working from home can feel isolating and we're still working to find the best ways to keep everyone connected.

Clients

PDA pursues public benefit in Minnesota and across the country by providing program evaluation, statistical consulting, and software development to clients whose programs seek to

improve the health and wellbeing of individuals and communities. We work with government agencies, universities, medical institutions, and non-profits to assess and improve their programs. We are committed to delivering objective, high-quality data and innovative, cost-effective solutions to clients. Our work is focused on tobacco cessation, chronic disease prevention, behavioral health, and other public health topics.

We proudly served **23** clients across **14** states in 2023.

- ✓ We take care to ensure we only work with clients and on projects that aim to produce or increase public benefit. We will never work with clients who sell tobacco products, participate in gambling, or cause unnecessary harm to the environment.
- ✓ Our evaluations support underserved populations by helping our clients better reach and serve people of color, people living on low incomes, uninsured people, those with limited education, and other groups with their public health programs. We prioritize discussing these populations and the impact of reaching them on client health equity initiatives.
- ✓ Our staff partner with clients to present at conferences and publish peer-reviewed articles on public health topics, living our value of Excel Together.

Challenge: One of our goals is to broaden our impact by expanding into new content areas within public health. While we had some success with that in 2023, it remains a challenge to obtain work in new areas.

Community

PDA is an avid supporter of our local community. Each year we contribute to the community through volunteerism, company financial donations, staff donation matching, and pro bono work. We support organizations that help our most vulnerable neighbors and advocate for social justice.

In 2023 we supported our community in a few primary ways:

- ✓ Continued our community giving program, which allowed staff to donate to any eligible non-profit organization and have their donation matched by PDA. This resulted in donations to 12 organizations totaling several thousand dollars.

- ✓ Completed multiple service projects including purchasing and packing kitchen starter packs for Bridging and snack packs for Face-to-Face. Both organizations support Minnesotans experiencing homelessness.



- ✓ Made two large donations to the New Impact Fund, a nonprofit composed of philanthropic leaders who want to invest in and with Black, Indigenous, Latino, Asian, and Immigrant business owners in underinvested Twin Cities neighborhoods. These donations supported multiple local, people of color owned businesses. Additionally, PDA's President serves as an advisor to this nonprofit.
- ✓ Donated to specific causes related to current events, such as supporting a local Juneteenth event and a food bank in Hawaii after the devastating wildfires.
- ✓ Bought local. When ordering lunches for staff, hosting happy hours, or giving gifts to staff, we patronized local, people of color owned businesses.



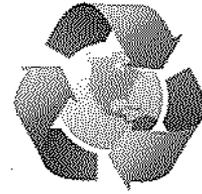
Challenge: As we hire more staff outside of Minnesota, our definition of local changes. PDA remains committed to supporting the Minneapolis community but must also provide staff with opportunities to support their home communities.

Environment

As a Certified B Corporation, we include the environment as one of our stakeholders and make every effort to minimize our impact. In 2023, we continued many of the practices we followed in previous years.

- ✓ Purchasing carbon credits from Native Energy to remain carbon neutral
- ✓ Utilizing solar panels on our building

- ✓ Buying only 100% post-consumer recycled paper products
- ✓ Recycling paper, glass, cans, plastic, and e-waste
- ✓ Using non-disposable dishware
- ✓ Composting of food scraps, paper towels, and other items
- ✓ Supporting restaurants and catering companies that utilize local and sustainable farmers
- ✓ Using non-toxic and sustainable cleaning supplies and hand soap
- ✓ Offering bus pass reimbursement to staff to encourage use of public transport
- ✓ Offering onsite showers and indoor bike parking to support biking to work



Challenge: Increased conference attendance and client site visits meant more air travel. We're challenged to do more to offset our carbon footprint.

Conclusion

PDA strives to maximize positive social impact in our community and the communities we work in while minimizing our impact on the environment. We do this through our project work, choice of vendors, philanthropy, and sustainability efforts. Additionally, we are committed to building a diverse workforce and inclusive culture where every individual has the resources and opportunities they need to grow, thrive, and succeed.



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Steve Simon

Steve Simon
Secretary of State