



# 2022 IMPACT REPORT



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## OUR JOURNEY FORWARD

How do we **make an impact?**

By **celebrating individuals, supporting organizations, and helping millions** realize their dreams and ambitions we improve the pathways from education **to and through professional life.**



YOUR JOURNEY  
IS UNIQUE. YOU  
DON'T HAVE TO  
GO IT ALONE.

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CastleBranch can  
help you get there.

We're each on our own personal and professional journey, fueled by **discovery**, **growth** and **opportunity**.

For over 25 years, **CastleBranch** has helped **8.6 million people** and **thousands of organizations** take the next step toward realizing their dreams and ambitions. Whether it's looking for a new job, the perfect employee, an advanced college degree or a fulfilling career pursuing your passion, **CastleBranch can help you get there.**

In this impact report, learn more about how **CastleBranch's** team of **420 individuals** has helped transform the education and healthcare industries, and connect millions of people with schools and employers as they progress along **their journeys to and through professional life.**



# CB Mission: Strengthening the Transition To and Through Professional Life

Improving pathways for individuals, schools, healthcare facilities and employers

## What does it mean to make an Impact?

Is it strictly the bottom line — moving the most products, making the most money? Or does it **mean something more**? Something **substantive, long-lasting, more impactful**?

At **CastleBranch**, we're driven to help individuals along their journeys **to and through professional life** (TTPL), and to improve their pathways through higher education, to their first job, and all the way through their entire professional career. That goes for our incredibly talented and dedicated **420 team members, 35,000 clients, and hundreds of thousands of employees, students and individuals** across the United States who interact with us each and every year.

We believe in **empowering all stakeholders** and helping them to realize their goals and ambitions. It's what we do, and have done, **for over 25 years** — positively impacting individuals, organizations and communities.

But while what we do is focused on **creating positive impacts**, it's **how we do it** that makes us truly special.

## Self-Discovery, Growth and Fulfillment

No two journeys are alike. But while our individual paths may be unique, those who rely on **CastleBranch** are united in their drive to **learn, grow, and discover** what lies ahead.

In over 25 years, nearly **8.6 million individuals** have relied on **CastleBranch** to help them take the next steps in their **personal and professional development**. For many individuals, that journey begins while pursuing a higher education.

Today, **CastleBranch** works with **over 70 percent of colleges and universities nationwide**, providing a wide array of services for schools and students. This



MISSION

includes providing students with access to our **industry-leading myCB™ platform** — a **compliance management solution** that provides a convenient, streamlined, web-based and secure means to share critical documentation with school administrators prior to the start of a semester. Each program or school may have **different documentation needs** — proof of vaccinations such as MMR, varicella or TDAP; a recently completed drug test; or a comprehensive criminal background check. **CastleBranch** can help facilitate it all, helping both individuals and schools share this information in ways that are **compliant with relevant privacy rules and regulations**, including FERPA, HIPAA, FCRA, GDPR, CCPA and more.

For many individuals, after higher education comes employment. Here, again, **CastleBranch** is a **key player**. With tens of thousands of public- and private-employer clients spread across the nation, **CastleBranch** provides millions of criminal record searches, drug testing results, and onboarding document assistance every year. Considered a prerequisite to joining most organizations during the onboarding or hiring process, this step is key in the **individual's growth to and through their professional life**, allowing them to pursue an exciting new career, opportunity or passion.

## Reversing the Nationwide Nursing Shortage by Strengthening the New Graduate Nurse Supply Chain

While **CastleBranch** is the industry leader in **background screening, drug testing and compliance management services** to colleges and universities, our true specialty lies with healthcare — an industry that, for decades, has struggled to overcome a nationwide nursing shortage due, in part, to a **shortage of incoming graduate nurses**.

**CastleBranch** is partnered with **over 80 percent of nursing education programs** in the United States, helping to connect aspiring student nurses with colleges, universities, hospitals and healthcare facilities. But in addition to offering our core **myCB™** services, **CastleBranch** also pioneered two unique services to help strengthen the pathway from student nurse to professional: **CB Bridges™** and **CB FutureFocus™**.





**CB Bridges™** is designed to **connect the interdependent ecosystems** of healthcare and education, to **remove barriers** to progress for students, schools and healthcare facilities, and **guide thousands of nursing students** each year through their clinical rotations and experiences.

With **CB Bridges™**, our first opportunity for discovery happens before the health professions student even steps foot inside a classroom, let alone a clinical experience. It starts with **verifying identity** — background checks, drug tests, medical and immunization record review — a **necessary step** all healthcare students must take before they are admitted to a program.

With a baseline established, we turn to guiding the student, school and healthcare facility through the next steps of the journey by helping to **onboard, place, schedule, track** and **evaluate** the clinical rotation experience. Each new touchpoint allows our learnings to grow, to understand a student's preferences, history, interests and competencies. Over time a picture of the individual starts to **slide into focus**, a story that when told with consent and purpose, contains **incredible power for individuals, schools and healthcare facilities**.

In the aggregate, this data contains tremendous power and potential to **better the entire industry** — both healthcare and education. For the individual, we take great pains to ensure the ownership and control of the data **remains completely with the individual**, empowering them to use their own information to discover their unique path forward on their journey **to and through professional life**.

Repairing the bridge between student, education, healthcare and professional has had a profound effect on the industry — **but more can be done**. Our true potential lies with **data**, with **learnings collected** — with **consent** — at critical moments along a student's educational journey, waiting to be unearthed, analyzed, and unleashed for the **betterment of the individual and the institutions**.

Enter **CB FutureFocus™**.

Launched in 2021, **CB FutureFocus™** leverages data collected during a student's clinical journey and adds to it, collecting information on **over 160 forces and factors** that help determine whether or not a student will become a successful healthcare professional.

This information, which is shared with healthcare HR professionals only with the student's consent, can also help both **student** and **healthcare facility** determine if the two are a **good match** — a good fit — for one another.

With **CB FutureFocus™**, our **impact is clear**. By providing healthcare facilities with **unprecedented visibility** into student data, we help them identify promising young students early, students who have the potential to **transform into great long-term professionals**. As the pathway is improved and qualified nurses stay connected to their facility, our platform is able to **help reverse the nationwide nursing shortage**, ensuring talented new graduate nurses are welcomed into the industry with open arms.

And what happens when the nursing shortage is reversed? When hospitals and healthcare facilities are **no longer struggling** to staff their facilities, when the quality of life-saving care delivered **isn't limited** by the number of qualified staff in the building, or when the pathway between nursing student and nursing professional **isn't littered with obstacles**?

The results are **nothing short of revolutionary**.

With **CB Bridges™** and **CB FutureFocus™**, **CastleBranch** is on a mission to **improve the entire healthcare system** for all stakeholders — for students, professionals, schools, hospitals and patients. It's a mission that impacts us all, one that starts by **improving pathways** and **fostering strong connections** between individuals and institutions.





# Empowering Millions to Achieve their Dreams

We're proud to serve millions, **empowering individuals** to take the next step in their educational and professional lives, and organizations to find and onboard highly qualified candidates. Since 1997, **we've served nearly 8.6 million customers**, creating a widespread **CastleBranch** community that spans the nation. Among this community is **70% of U.S. colleges and universities**, and **80% of the country's nursing students**. Compliance reports like background checks, drug tests, employment and education verifications, and COVID vaccine passports are **crucial stepping stones** in each customer's **successful education and employment**.

**We're honored to be part of each person's professional journey.**



**42.4 MILLION**  
Background Check  
Records Delivered



**46.1 MILLION**  
Records Reviewed



**8.6 MILLION**  
Individuals Served



**2.8 MILLION**  
Drug Tests Processed



**5.8 MILLION**  
Students Supported





# TRANSFORMATIVE CHANGE FOR INDIVIDUALS & ORGANIZATIONS

Solving complex problems with thoughtful, elegant and simple solutions that **empower** and **elevate** us all.



# Innovating Solutions for Complex Problems in the Nursing Industry

**Nursing is in crisis.** Healthcare organizations are hemorrhaging trained nurses while experiencing difficulty in hiring new ones. Simply put, **the pipeline of professional nurses** — those entering nursing education programs, attending classes and clinical rotations, graduating and entering the workforce — **is broken.**

The COVID-19 pandemic **further ruptured the pipeline** in 2020-2021, elevating the urgency to critical status and compelling **CastleBranch** to contribute our supply chain expertise toward **finding a solution.**

## Data separates a nursing supply chain from a pipeline.

It helps **refine a pool of nursing graduates into successful long-term employees** much like the refining process of crude oil turns it into high-test gasoline. By **adding visibility** into a nurse's skill sets, personality, passions, ideal work environment, and goals — **finding what is unique about them and where they want to be** — **hospitals can connect with a top candidate** who'll not only fill a position, but thrive in it.

Utilizing supply chain methodology and its **focus on quality as well as quantity** allows healthcare organizations to **identify and celebrate the individual** in building a quality staff, avoiding hiring mistakes and high turnover that just adds to the nursing crisis.

Our solution, **CB FutureFocus™**, helps hospitals find individuals who check all the boxes for an **ideal fit** in real time, forming a **fully realized supply chain** of future employees.





# Bridging The Gap Between Healthcare Facilities and Education with CB Bridges™

There's no question about it: **the need for nurses right now is critical**, and the shortage is projected to **get worse in the next decade**. Through trusted, long-time partnerships with nursing education associations and our **80% stake in nursing education programs** across the country, we at **CastleBranch** are in a unique position to strategically work within the nursing field, collaborating with our healthcare and education partners to understand and **help address the nursing shortage crisis**.

Education is just the start of the journey for a future nurse, but it can also serve as a bottleneck. Nursing students need access to **valuable clinical rotation opportunities at healthcare facilities**. Without them, they lack the experience, skills and expertise needed to graduate and find work.

**CastleBranch's CB Bridges™** is designed to remove this bottleneck, helping students, educators and healthcare facilities **manage** and **standardize** the entire student clinical rotation process.

By facilitating better collaboration between educational institutions and their clinical partners, **CB Bridges™** helps to ensure no clinical rotation opportunity goes to waste, **dramatically improving partnerships** between schools and hospitals and outcomes for students looking to gain the **valuable experience necessary** to graduate and become professional nurses.



Scan here  
to watch video



## CB FutureFocus™: Working To Solve The Nursing Shortage

With **CB Bridges™** enabling more students to make it through clinical rotations, hospitals have a more **robust employment pipeline** flowing through their facilities. But without any visibility into this pipeline, the best nursing candidates will **slip away**. To help address this issue, we've developed a solution to **reveal the employment pipeline** and bring it into sharp focus: **CB FutureFocus™**.




**CB Future Focus™** is an online tool offering **never-before-seen visibility** into students attending clinical rotations at a medical facility, allowing employers to **identify** and **connect** with ideal nursing candidates **earlier in the process**. By providing visibility into key data points that can help organizations determine whether a potential nurse will be a great long-term fit, **CB FutureFocus™** helps to effectively match students to open opportunities, ensure a **right fit for the employer**, and enable a **smooth and fulfilling transition** to professional life for nursing students.



# My Data. My Decision. My Future.

**Your data should be yours** — and nobody else's. It can reveal a lot about who you are, what you want, and where you're headed, which is why we believe **you should be empowered to decide, how, where and with whom your data is shared at all times.** This is a **CastleBranch core value**, driving how we help **you control your data** and **empower you to realize your future dreams and ambitions.** With an individual's express permission, data can be shared with schools, employers, or other organizations, helping to ensure it's used in an ethical, moral, and legally compliant manner throughout your journey **to and through professional life.**

## Your Digital Bill of Rights:

-  Your personal data remains yours and yours alone — **you are the sole owner.** If you don't grant us express written permission to collect or share your data, we won't.
-  **You are informed every step of the way** about how we use your data. We don't use or share your data in any way other than how you have granted us permission to use it.
-  **You are protected** in a changing legal landscape of international, national, and local data privacy laws and regulations.



## PBSA Accredited

Our national accreditation by the **Professional Background Screening Association** is proof of our commitment to delivering the **highest level of industry compliance standards** to significantly reduce your risk and liability, going **above and beyond** to protect the sanctity of your data.





## PEOPLE & COMMUNITY

**Inspired individuals** come together to **create inspiring communities**, from our **CastleBranch teammates** to the hundreds of thousands of students, employees, schools, hospitals and employers we support.



# Our CB People

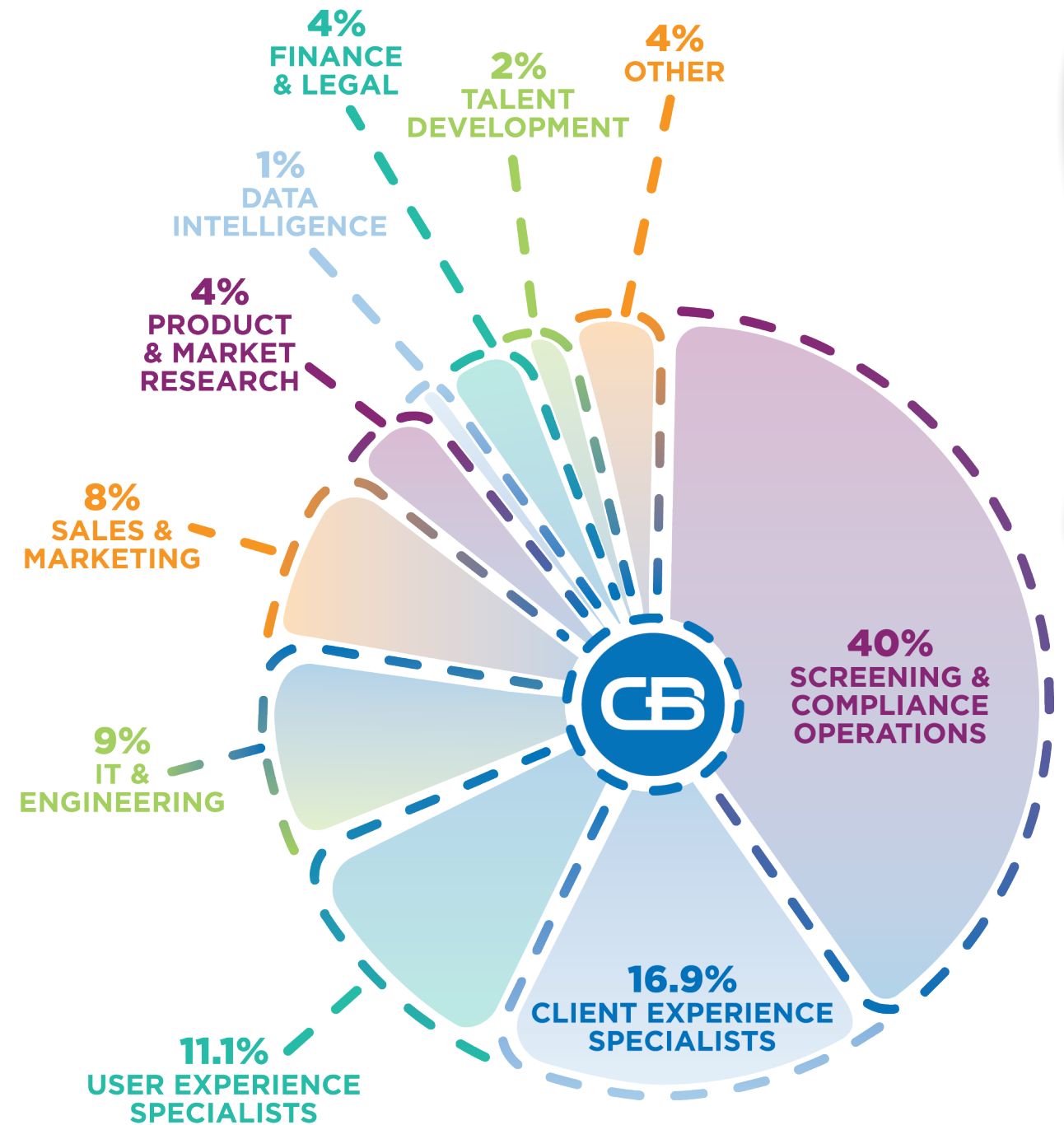
At **CastleBranch**, we are made stronger through **diversity, uniqueness, and inclusion**, and we believe in celebrating **every team member's individual strengths and accomplishments**. Through internal advancement and career-exploration opportunities, we work to nurture each individual's **professional path**. Our team members are on an everyday journey of **self-discovery**, powering **CastleBranch** with their **creativity, courage and passion**.



**Senior Learning Systems Specialist** Ian Harper has over 15 years of combined experience at **CastleBranch** working in different roles. "There are so many different facets to this organization. For me, learning new layers of the business has been the best part." As a longtime employee, he takes pride in being a founding member of **CastleBranch's** industry-defining customer service team. With so many different roles under his belt, he now acts as the administrator for **CastleBranch's Learning Management** system and loves working with his team to deliver training material to the over 400 individuals within our organization. "I'm kind of addicted to the faith and trust **CB** puts in me every day — it's a true honor."

“**CastleBranch has always made sure that I can put my family first with anything.**”

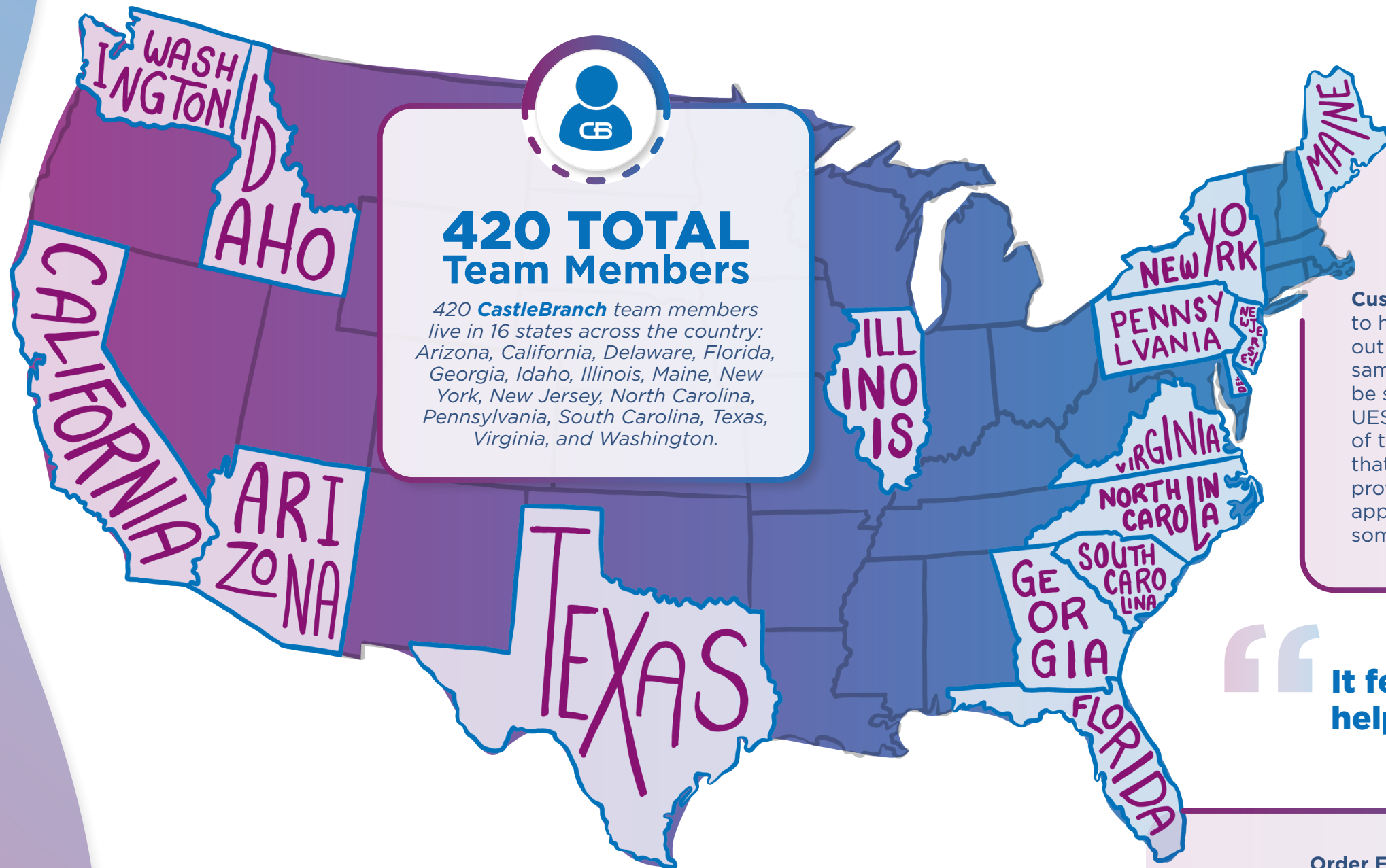
**Senior Account Executive** Mario Rodriguez celebrated his 19th work anniversary at **CastleBranch** in August 2022. Mario and his wife have two young children, so working for a company that prioritizes family is crucial to him. "**CastleBranch** has always made sure that I can put my family first with anything," Mario says. "All the things that mean the most to me I get from **CastleBranch**. That's why I've been content."



**PROMOTIONS AND ADVANCEMENTS**

In 2022, **214 team members** were promoted or advanced to a new role. That's more than half of our team members!





## 420 TOTAL Team Members

420 **CastleBranch** team members live in 16 states across the country: Arizona, California, Delaware, Florida, Georgia, Idaho, Illinois, Maine, New York, New Jersey, North Carolina, Pennsylvania, South Carolina, Texas, Virginia, and Washington.



**Customer Success Trainer** Rob O'Connor advanced to his current role in May 2021. In 2018, he started out as a User Experience Specialist (UES), the very same role that he now trains and empowers to be successful at **CastleBranch**. He describes the UES job as “like a dispatcher,” and credits the rest of the **CB team** with creating a support system that enables UES representatives to do their job, providing frontline assistance to students and applicants. “It feels really good to be able to help someone immediately,” he says.

“It feels really good to be able to help someone immediately.”



**Order Expedite Specialist** Kwanisha Fowler transitioned back to **CB headquarters** in June 2021, after working remotely during the COVID-19 pandemic. She credits **CastleBranch's** strong sense of community as well as her family heritage for instilling in her the strong connections that kept her motivated during these transitions. Kwanisha lived in a small province in the city of Busan, South Korea. Being a part of a company that honors diversity and inclusiveness is important to her. “Of all of the organizations I’ve ever worked for, **CastleBranch** has been the most progressive,” she says. “It’s another reason **CastleBranch** is a step above. I look forward to continuing long-term growth with **CastleBranch**.”

“Of all of the organizations I’ve ever worked for, **CastleBranch** has been the most progressive. It’s another reason **CastleBranch** is a step above. I look forward to continuing long-term growth with **CastleBranch**.”



# Serving Our Community



## GLOBAL AMBASSADOR

Technical Support Specialist **Brandon Cagle**'s activism and passion led to an invitation to enroll in **CastleBranch's Global Ambassador University**, a one-of-a-kind program designed to help individuals **build networks, travel, and discover knowledge** of others and themselves. As a Global Ambassador, he has led conversations on **equity and inclusion** and is working to foster connections, communication and building blocks of the **Black entrepreneurial journey**. In 2022, Brandon continued his work with Lowercase Leaders, the organization he co-founded with the goals of harm reduction, mutual aid and community cohesion for historically marginalized populations.



**COMMEMORATING JUNETEENTH:** **CastleBranch** added a new company holiday for 2022 and beyond. **Juneteenth** (June 19) honors the 1865 end to slavery in the U.S. Considered the oldest nationally celebrated **commemoration of abolishing the slave trade**, it officially became a U.S. federal holiday in 2021. **CastleBranch** encourages its team members to attend festivals and educational events that **honor the legacy of Juneteenth**.



### PAID VOLUNTEER LEAVE:

**CastleBranch** team members are gifted volunteer hours each year, allowing them to take time from work to **give back to the community**. That's **3,360 hours to make an impact** while still getting paid.



## TEAM BUILDING

**CastleBranch's** entire Legal team spent a December 2022 weekday morning **volunteering at Good Shepherd Center**, a Wilmington nonprofit organization that **feeds the hungry, shelters the homeless and fosters the transition to housing**. The group boxed groceries, served lunch in the soup kitchen and cleaned the facility.

"Volunteering in a positive environment outside of the office was an awesome opportunity to **connect as a team**," Contracts Counsel **Caroline Rawl** says. "Further, working with the staff at Good Shepherd made the experience personal and fun — all **dedicated and connected by one cause**. Our work was purposeful and a good reminder that helping others can take a variety of forms. **Small actions can make the biggest difference.**"

## GIVING BACK

In addition to providing volunteer time for team members to use during work hours, **CastleBranch** also offers paid time off in exchange for hours volunteered outside of work. Team members may **donate their time to any nonprofit organization** that is meaningful to them.

Content Writer/Editor **Judy Royal** regularly transports dogs and cats for Wilmington animal rescue group **RescueConnect**, but to maximize the benefit offered by **CastleBranch** she expanded her efforts in 2022 to include volunteering for **SkyWatch Bird Rescue and Island Wildlife**. "**CastleBranch** has encouraged me to seek new ways of **giving back to my community**," she says.



### CLEANING IT UP:

**CastleBranch** team members met at Wrightsville Beach early on an October 2022 weekday morning to participate in a **volunteer litter sweep**.



# Empowering Others Through Partnerships

Our partners help drive our success, and **we help drive theirs.**

**CastleBranch** is deeply committed to finding world-class, innovative solutions to help **support healthcare professions education**, and nowhere is that commitment more evident than our **10+ year partnership** with the **Organization for Associate Degree Nursing (OADN)**. **OADN**, a transformational voice in healthcare leadership, is the national advocate for the **over 1,200 associate degree nursing programs** across the country. The organization works to advance excellence in nursing education and community college pathways into registered nursing careers, and works closely with **CastleBranch** to provide feedback, learnings and guidance to help us **better serve educators, students and healthcare professionals.**



Scan here to learn more



During the pandemic, we grew our network to include the **Infectious Disease Council**, an international coalition of multi-disciplinary experts that works to help **prepare organizations and individuals** for the threat of infectious disease. We assembled and worked closely with this panel to guide the creation of our **COVID-19 Compliance solution set**, helping individuals and organizations fight COVID-19.



## “Actionable Methods for Educators and Employers to Address Nursing Workforce Challenges”



Scan here to read the white paper coauthored by **CastleBranch** and **OADN**





# Supporting our Future Nursing Leaders Through Scholarships

CastleBranch is honored to fund annual scholarships for nursing students and educators across the country.



**TANYA SIMS, MSN, RNC-OB** is a 2022 recipient of **OADN’s Educator Scholarship for Academic Progression**. Here she shares with us her journey from nurse to nursing education.

“The first part of my career validated my calling by bringing new life into the world in the delivery room, and my second half of nursing has provided me with the blessing of birthing new registered nurses into the workforce.”



For Tanya Sims, immersion into teaching undergraduate students is a **fulfillment of her life’s calling**. During her **13-year career as a Registered Nurse** in labor and delivery, she enjoyed precepting student nurses, so answering the call to work in the Skills Lab in an Associate Degree Nursing program at Louisiana Tech University was an easy transition. That spark led to earning her **MSN in Nursing Education: Maternal-Child emphasis** and her current pursuit of a **Doctorate of Nursing Practice: Educational Leadership**.



*“The rapidly evolving climate of health care has triggered a need to prepare graduates for the **complexity and chaos of nursing**,” Tanya explains. “The pandemic, flight of bedside professionals, salary inequities, and evolving NCLEX-test plans all sent me into a metaphorical ‘labor’ to **seek the most advantageous skill set** to serve the students that sit before me in the classroom clinical setting.”*



Tanya is committed to using her newfound knowledge for the **betterment of the nursing profession**. “I will not receive a terminal degree that takes me away from students to business acumen. Instead, I plan to utilize my elevated leadership experience and **strengthen the students in my care.**”

Each year, **CastleBranch funds four scholarships** for deserving individuals to **support our future nurses and nurse educators**. We collaborate with our nursing leadership partner, the **Organization for Associate Degree Nursing (OADN)** to identify recipients.

**OADN Foundation Scholarships**

- Educator Scholarship for Academic Progression — **\$5,000**
- Educator Scholarship for Academic Progression — **\$2,500**
- Student Scholarship for Allied Health Careerists in Nursing — **\$2,500**
- Educator Scholarship for Professional Development — **\$2,500**





## CHARTING OUR COURSE

With your support, **CastleBranch** has helped millions reach their **goals, dreams** and **ambitions** for over 25 years.

**We're just getting started.**



# TOGETHER AS ONE: The CastleBranch Impact

## OUR JOURNEY FORWARD



## PEOPLE & COMMUNITY

## TRANSFORMATIVE CHANGE FOR INDIVIDUALS & ORGANIZATIONS



# Reflecting Back and Looking Ahead

## A MESSAGE FROM JOE STEWART *CastleBranch President*

More than **two decades ago**, **CastleBranch** began as a **four-person operation** running background checks for a handful of local childcare workers. Today we're **420 team members** strong. We assist **tens of thousands of clients** and **serve 80% of nursing education programs** across the country. And although our journey is **26 years in the making**, in truth, it has only just begun.



While 2022 brought uncertainty at times, it also brought **conviction, certitude** and **direction** for **CastleBranch**. We refocused our commitment to devising solutions for the complex problems our clients face with a growing national emergency at our core: **the nursing crisis**. **CastleBranch** is, and will continue to be, committed to growing individual talent in the nursing field, and helping healthcare facilities discover, hire, and retain this talent. We're passionate about helping people advance in their journeys **to and through professional life**, and about creating real-world solutions to support individuals as they progress along these journeys. As we move forward, we will continue to develop and finetune methods of achieving this goal, and spearhead new research to illuminate problems and solutions within the nursing industry.

In 2022, **CastleBranch** brought our innovative **CB FutureFocus™** solution to market, providing never-before-possible **visibility for healthcare facilities into the new graduate employment pipeline**. Using sophisticated data and reporting, **CB FutureFocus™** helps both individuals and organizations determine whether or not they'd be a good employment fit, encouraging long-term placement designed to **impact the national nursing shortage**.

But with data comes responsibility, something **CastleBranch** takes very seriously. **We believe each person has the right to control their own data**, to maintain self-sovereignty over their digital identity to ensure their information is only used in a manner they see fit. Moving forward, our unique **Nothing About Me Without Me™** approach will continue to guide our solutions. Protecting each individual's personal identity is, and will continue to be, central in all our actions.

For all of this and so much more, I am tremendously grateful. I am grateful to the **CastleBranch** team for making 2022 our most impactful year yet, when we proved that we are capable of continuously adapting and serving our community during times of great change. I am grateful to our many clients in the fields of healthcare and nurse education who fought tirelessly through the immense challenges of the COVID-19 pandemic, amidst a nationwide chronic nurse shortage. **Your determination and grit is nothing short of extraordinary**. I am grateful for the schools, employers, and companies that have entrusted us with your business, regularly allowing us insight into your worlds so we can understand how to help you solve your biggest challenges and achieve your professional dreams.

**Together with each one of you, I can't wait to see where the future takes us.**


Sincerely,

**Joe Stewart**







*Scan here*   
to visit us online at  
**discover.castlebranch.com**



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