NAMICon 2020
A Virtual Event • July 13-14
Together Toward Tomorrow
Rethinking DEI: From ‘nice to have’ to mission imperative

Monica L. Villalta
National Director Inclusion & Diversity Officer

NAMICOn 2020
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Rethinking DEI:
From ‘nice to have’ to mission imperative

Purpose:
- Introduce myself
- Rethinking the approach to DEI
- Share selected definitions and emerging issues
- Best Practices
- What we are doing
- Your voice

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A bit about my story

- Immigrant
- Bilingual/ESL
- Pronouns: She/Her
- First girl to complete university

Focus on cultural competence

- Worked in health care systems, not-for-profit, volunteer management and research
- AECF and NHLI Fellow
- Not just a job.
Achieving Mission

NAMI envisions a world where all people affected by mental illness live healthy, fulfilling lives supported by a community that cares.

NAMI provides advocacy, education, support, and public awareness so that all individuals and families affected by mental illness can build better lives.

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Stated and Aspirational Values

**NAMI VALUES**

**HOPE**
We believe in the possibility of recovery, wellness and the potential in all of us.

**INCLUSION**
We embrace diverse backgrounds, cultures and perspectives.

**EMPOWERMENT**
We promote confidence, self-efficacy and service to our mission.

**COMPASSION**
We practice respect, kindness and empathy.

**FAIRNESS**
We fight for equity and justice.

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Executing on Strategy

NAMI 2020-2025 Strategic Plan

Roles
- The Way We Work Together
  - We Listen & Build Our Community
  - We Educate & Support
  - We Advocate
  - We Lead the Conversation

Accelerators
- The Power Behind Our Progress
  - Diversity & Inclusion
  - Technology
  - Partnerships
  - Financial Strength

Goals
- The Change We Will Create
  - People Get Help Early
  - People Get the Best Possible Care
  - People Get Diverted from Justice System Involvement

NAMICon 2020
Rethinking DEI

NAMI
2020-2025 Strategic Plan

Roles

Accelerators

The Power Behind Our Progress

Diversity & Inclusion
Technology
Partnerships
Financial Strength

Goals

One Inclusive
A Strong Alliance

The Change We Will Create
People Get Help Early
People Get the Best Possible Care
People Get Diverted from Justice System Involvement

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Some Basic Definitions

Diversity

Refers to all the similarities and differences that define us as human beings
Dimensions of Diversity

The variety of differences and similarities/ dimensions among people, such as:

<table>
<thead>
<tr>
<th>Age</th>
<th>Generation</th>
<th>Parental status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belief system</td>
<td>Geography</td>
<td>Personality type</td>
</tr>
<tr>
<td>Class/caste</td>
<td>Job role and function</td>
<td>Race</td>
</tr>
<tr>
<td>Culture</td>
<td>Language</td>
<td>Religion</td>
</tr>
<tr>
<td>Disability</td>
<td>Marital status</td>
<td>Sexual orientation</td>
</tr>
<tr>
<td>Education</td>
<td>Mental health</td>
<td>Thinking style</td>
</tr>
<tr>
<td>Ethnicity</td>
<td>Nationality</td>
<td>Work experience</td>
</tr>
<tr>
<td>Gender</td>
<td>Native or indigenous</td>
<td>Work style</td>
</tr>
<tr>
<td>Gender identity</td>
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</tbody>
</table>
Definitions

Inclusion

The climate we create to help organizations and individuals benefit from diversity of ideas, knowledge and experience
Inclusion is:

• A sense of belonging.

• Feeling respected, valued and seen for who we are as individuals.

• There is a level of supportive energy and commitment from leaders, colleagues and others so that we—individually and collectively—can do our best work.

Equity vs. Equality

- Diversity ≠ Inclusion
- Equity ≠ Equality
Culture

Source: Video Organizational Culture by Kathy Milhauser. 2014
Culture

The set of beliefs, values, customs, actions, thoughts, communications, institutions, and ideas shared by social groups

Source: Video Organizational Culture by Kathy Milhauser, 2014
Where do we see Culture?

**Artifacts**
The way the people act, the things they say, the way they dress, behave, and the items that they surround themselves with

**Values**
The articulation of the basic assumptions

**Underlying Assumptions**
The deeply buried foundation for the values that the group has formed over time

Source: Video Organizational Culture by Kathy Milhauser, 2014
Culture Clash
Culture Clash

- Invisible History
- Different experiences
- Disparate treatment
- Disparities & Disproportionalities in investments and outcomes
- Injustice and unrest
“DEI are not ‘nice to have’. They are imperative to achieve mission”

Monica Villalta
Cultural Transformation

• Diversity is leveraged to create a **fair, healthy, and high performing alliance.**

• An inclusive environment ensures **equitable access to resources and opportunities for all.**

  “When culture allows individuals and groups to feel **safe, respected, engaged, motivated, and valued for who they are and for their contributions** toward organizational or societal goals.”
CULTURAL COMPETENCE

The capacity (including skills, behaviors and attitudes) to effectively and equitably navigate and interact across cultures
NOT
≠ A fad
≠ Affirmative Action /Compliance Requirement
≠ Temporary Initiative
≠ Reactive

YES
✓ A mindset
✓ The way we do our work (Behaviors, skills, attitudes)
✓ Long Term Investment
✓ A managed process
The right approach: Woven into organizational fabric
## Why?

**Diversity has a positive impact on many key aspects of organisational performance**

<table>
<thead>
<tr>
<th>Diversity management helps to...</th>
<th>Rationale</th>
</tr>
</thead>
<tbody>
<tr>
<td>...win the war for talent</td>
<td>• A strong focus on women and ethnic minorities increases the sourcing talent pool, a particular issue in Europe. In a 2012 survey, 40% of companies said skill shortages were the top reason for vacancies in entry-level jobs.</td>
</tr>
<tr>
<td>...strengthen customer orientation</td>
<td>• Women and minority groups are key consumer decision makers: for example, women make 80% of consumer purchases in the UK.</td>
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<td>• Gay men and women have average household incomes that are almost 80% higher than average.</td>
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<tr>
<td>...increase employee satisfaction</td>
<td>• Diversity increases employee satisfaction and reduces conflicts between groups, improving collaboration and loyalty.</td>
</tr>
<tr>
<td>...improve decision making</td>
<td>• Diversity fosters innovation and creativity through a greater variety of problem-solving approaches, perspectives, and ideas. Academic research has shown that diverse groups often outperform experts.</td>
</tr>
<tr>
<td>...enhance the company’s image</td>
<td>• Social responsibility is becoming increasingly important.</td>
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<td></td>
<td>• Many countries have legal requirements for diversity (e.g., UK Equality Act 2010).</td>
</tr>
</tbody>
</table>
How?

<table>
<thead>
<tr>
<th>Diversity</th>
<th>Define a clear value proposition</th>
<th>Establish a fact base</th>
<th>Create targeted initiatives</th>
<th>Define the governance model</th>
<th>Build inclusion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aspire</td>
<td>Create a clear value proposition</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Assess</td>
<td>Where do we want to go?</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Architect</td>
<td>How ready are we to go there?</td>
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<tr>
<td>Act</td>
<td>What do we need to do to get there?</td>
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</tr>
<tr>
<td>Advance</td>
<td>How do we manage the journey?</td>
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</tbody>
</table>

- Create a clear value proposition for having a diverse and inclusive culture
- Set a few clear targets (not quotas) that balance complexity with cohesiveness
- Understand the current situation in terms of statistics and mindsets and learn from external best practices. Understand root causes and underlying mindsets
- Differentiate initiatives by diversity group, for example, gender initiatives do not always resonate with other minorities. Lead from the top
- Define the rollout strategy for all initiatives. Launch 1-2 highly visible flagship projects at the beginning of the effort. Monitor rigorously
- Continuously address potential mindset barriers through systematic change management. Link diversity to other change management efforts

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The GDIB helps organizations

- Realize the depth, breadth, and integrated scope of D&I practices
- Assess the current state of DEI
- Determine strategy and tactics
- Measure progress in fostering inclusion and managing diversity
The Journey

**INTERNAL**
- Attract & Retain People
- Recruitment & Development
- Benefits
- Compensation
- Learning

**EXTERNAL**
- Listen to & Serve Society
- Social Responsibility
- Products & Services
- Marketing
- Supplier Diversity

**BRIDGING**
- Align & Connect
  - Assessment
  - Communications
  - Sustainability

**FOUNDATION**
- Drive the Strategy
  - Vision
  - Leadership
  - Structure

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Measuring Progress

FIVE LEVELS of PROGRESS

5. BEST PRACTICE
   Demonstrating current best practices in D&I; exemplary for other organizations globally.

4. PROGRESSIVE
   Implementing D&I systemically; showing improved results and outcomes.

3. PROACTIVE
   A clear awareness of the value of D&I; starting to implement D&I systemically.

2. REACTIVE
   A compliance mindset; actions are only taken in compliance with relevant laws and social pressures.

1. INACTIVE
   No D&I work has begun; diversity and a culture of inclusion are not part of organizational goals.
OUR APPROACH TO CREATING:
ONE INCLUSIVE NAMI

MANAGED CHANGE PROCESS

BOARD & DEI ADVISORY COMMITTEE

CEO DEI STAFF COUNCIL & ADVISORY GROUPS & SENIOR LEADERSHIP

SUSTAINED INVESTMENT

ONE STRATEGY

DEI OFFICE/DIRECTOR OF INCLUSION

DEI STAFF COUNCIL & ADVISORY GROUPS

CULTURAL TRANSFORMATION

COLLABORATIVE LEADERSHIP

BENCHMARKING

A STRONG ALLIANCE
That Can Deliver on Mission Through an Inclusive Culture and Strategy
NAMI’s APPROACH

We are designing a strategic, comprehensive and systematic approach to cultural transformation. Efforts include:

• Building a solid foundation and an organizational structure that supports DEI.

• Defining diversity, equity and inclusion for our organization and using our shared language to advance our understanding.

• Assessing current status and planning for a desired future.

• Enabling training and development that enhances our capacity to interact effectively with colleagues and members of our surrounding communities.
WE ARE COMMITTED TO DIVERSITY, EQUITY AND INCLUSION

NAMI BOARD OF DIRECTORS’ STATEMENT

At NAMI, we believe a diverse, inclusive and equitable organization (or Alliance) is one where all employees, volunteers and members — regardless of gender, race, gender identity, ethnicity, national origin, age, sexual orientation, education, disability, veteran status or other dimension of diversity — feel valued and respected.

We are committed to providing informed, authentic leadership for cultural equity and to modeling diversity and inclusion for the entire NAMI alliance. We shall:

- See diversity, inclusion and equity as connected to our mission and critical to ensure the well-being of our staff and the NAMI alliance we serve.
- Identify and dismantle inequities within our policies, systems, programs, and services and continually update and report organization progress.
- Explore potential underlying, unquestioned assumptions that interfere with inclusiveness.
CEO’S VISION

As an organization, we are making new investments and commitments to diversity, equity and inclusion. Through our work, we will:

- Model diversity and inclusion for the NAMI Alliance.
- Establish processes and policies that enable diversity, equity and inclusion.
- Create and maintain a positive work environment that reflects our commitment to equity and inclusion.
- Encourage participation by all staff and members so that all voices are heard and valued.
- Live up to our stated and aspirational organizational values.
- Leverage DEI to achieve our mission.

We will lead by example and help set goals and expectations that influence workplace interactions, everyday practice and long-term outcomes for the National Office and the entire Alliance.
A Framework for Operationalizing DEI

- Career and People
- Cultural Competence and how we Work
- Communications and our Brand or Identity
- Community/Clients and Growth
Stakeholder Voices

DEI STAFF COUNCIL

NAMI is in the process of establishing its first chartered DEI Staff Council. The group — comprised of voluntary staff members — is a core component of NAMI’s strategic DEI leadership group.

Together with the Board DEI Work Group, the DEI Staff Council will provide thought leadership, guidance and recommendations to the DEI Executive Sponsor and the DEI Office. They will promote activities and model behaviors and share any lessons learned or resources to support the work of the Alliance.
Your VOICE

The Alliance
Educational Resources on Racism and Inequality

Understanding the context of racism and recent events
• Video on understanding racism and the reactions to the death of George Floyd and many others
• Video on understanding the perspectives of your colleagues of color
• Article on “White Privilege: Unpacking the Invisible Knapsack”
• List of Anti-Racism resources

Understanding the context of racial inequality that impacts mental health
• APA Best Practices on working with Black patients
• APA Mental Health Facts for Black Americans (2017)

Ways to take action as an ally or champion for people of color
• Article on being a white ally through word, actions and power
• Article on being a white ally for racial justice
• Community based organizations to partner with: Color of Change, Black Lives Matter, Change Zero, The Innocent Project
Thank You!