

Elevating the Hispanic Experience:

Actionable Strategies for
Workforce Transformation



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Executive Summary

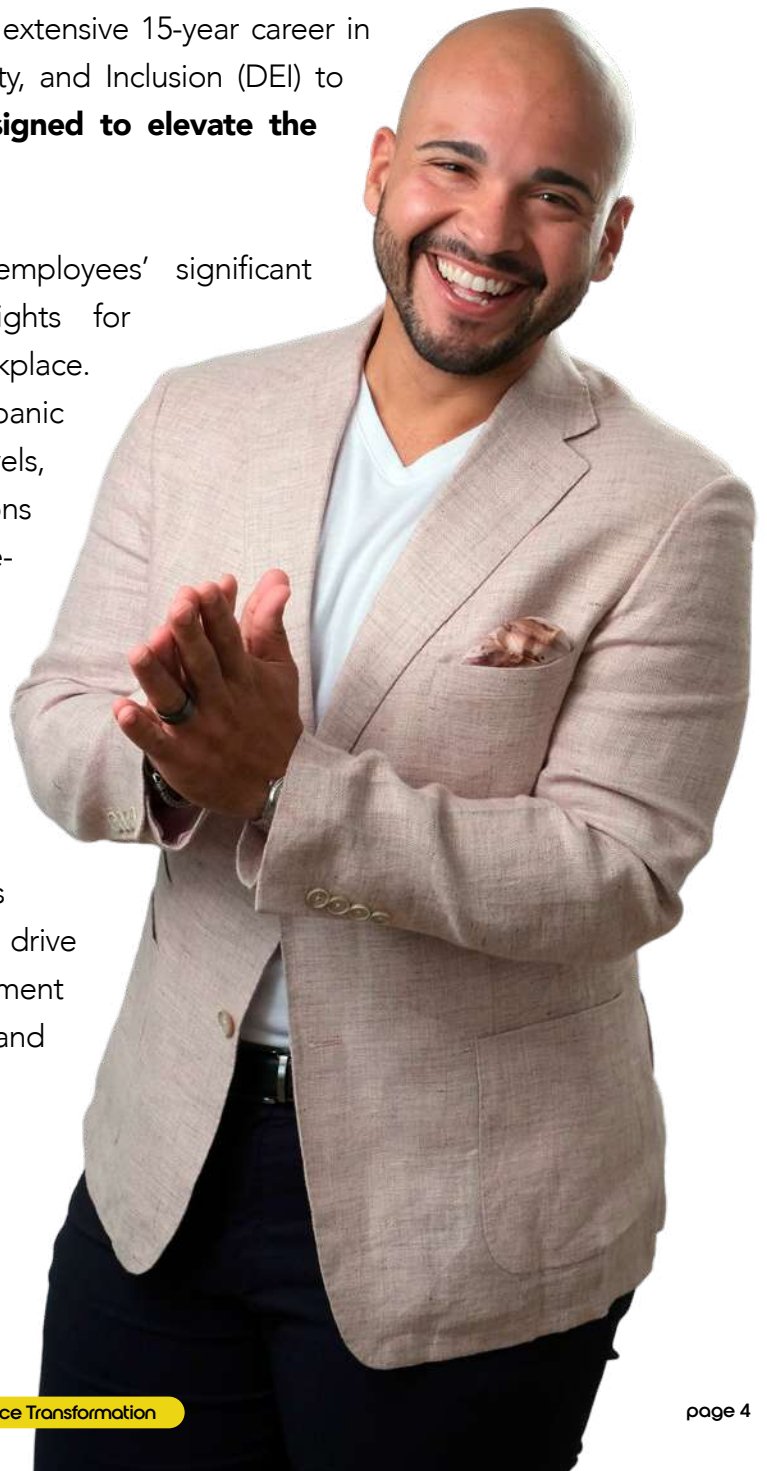
Overview

EXECUTIVE SUMMARY

Lead researcher **Joey Aviles** leverages his extensive 15-year career in Human Resources (HR) and Diversity, Equity, and Inclusion (DEI) to present a **transformative framework designed to elevate the Hispanic experience in the workplace.**

This white paper addresses Hispanic employees' significant challenges and provides strategic insights for creating a more inclusive and equitable workplace.

Drawing from extensive interviews with Hispanic professionals across various industries and levels, the findings offer actionable recommendations that organizations can implement immediately. Joey's role as the Founder and Chief Belonging Officer of MJA & CO and his pioneering tenure as the first civilian Chief of Diversity and Inclusion in the largest Coast Guard in the world further underscore the depth of experience and authority behind these strategies. The goal is to equip senior executives with the tools to drive meaningful change, fostering an environment where Hispanic employees can thrive and contribute to organizational success.



Actionable Takeaways

1

Enhance Cultural Intelligence:

Invest in cultural intelligence through comprehensive training, mentoring, and experiential learning to leverage the unique strengths of your Hispanic workforce, improve multicultural team performance, and foster an inclusive, high-performing organization.

- **Elevation Challenge:** *How can you leverage cultural intelligence to elevate the Hispanic experience?*

Leverage Representation:

Turn representation into action by creating a targeted accelerator program for Hispanic employees that combines mentorship, sponsorship, and rotational leadership roles to fast-track their journey to executive positions.

2

- **Elevation Challenge:** *How can you transform your current Hispanic representation into a dynamic leadership pipeline?*

3

Prioritize Professional Development and Honor Global Education

Recognize and value foreign education and experience by creating pathways for accrediting foreign certifications within your organization.

- **Elevation Challenge:** *What is the barrier to access and the long-term impact of your educational requirement policies? How can you prioritize professional development and honor global education?*

Prioritize the Hispanic Experience in DEI Initiatives:

Don't let the Hispanic experience get lost in general DEI strategies; tailor your initiatives to honor their unique perspectives and experiences.

4

- **Elevation Challenge:** *How can you ensure the Hispanic experience is not watered down in DEI efforts?*

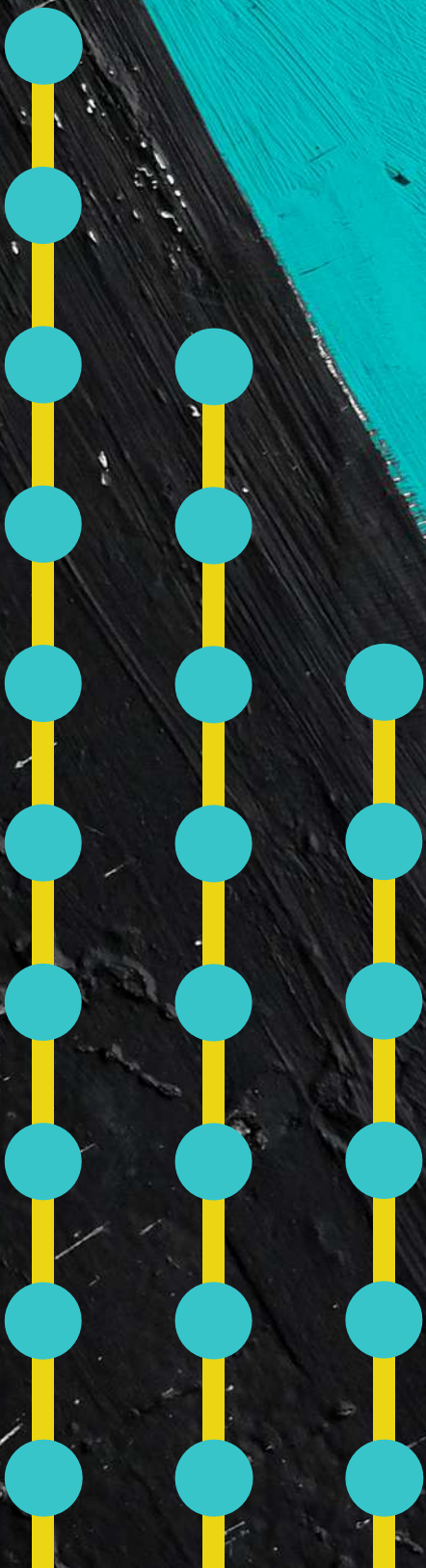
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Elevate the Hispanic Experience by Cultivating Adaptive and Inclusive Leadership.

Focusing on adaptive and inclusive leadership competencies to make your leadership practices more responsive to the nuances of the community.

- **Elevation Challenge:** *How can you develop adaptive and inclusive leadership competencies that elevate the Hispanic experience within your organization?*

Introduction



Introduction



Hispanics are the largest ethnic minority group in the United States, accounting for a significant portion of the workforce across multiple sectors. Despite this growth, Hispanic employees often find themselves underrepresented in leadership positions and facing barriers that impede their professional development. Research reveals a persistent gap in mentorship and support systems, which are critical for career advancement and job satisfaction.

Educational attainment among Hispanics has seen significant improvements, with more Hispanic students enrolling in and completing graduate degrees than ever before. However, these educational gains have not yet translated into proportional increases in high-level professional roles. Hispanic women face compounded challenges due to gender and ethnic biases that affect their earnings, job stability, and overall career progression.

Despite concerted efforts to enhance DEI within organizations, Hispanic employees continue to experience systemic inequities. These issues manifest in various forms, including limited access to mentorship, lack of representation in executive roles, and persistent wage gaps. The inability of organizations to effectively address these challenges hinders organizational growth and innovation.

By addressing these key areas, organizations can unlock the full potential of their Hispanic workforce, leading to a more dynamic, innovative, and successful business environment. This white paper serves as a call to action for leaders to recognize the challenges faced by Hispanic employees and to actively work towards creating a more inclusive and equitable workplace for all.



Key Insights





Focus

Development Linear progression

Components

Goal

Example

INSIGHT 1

Insight 1:

Enhance Cultural Intelligence

Cultural intelligence (CQ) refers to the ability to relate and work effectively across cultures. Implementing robust cultural intelligence training at all organizational levels can significantly improve interpersonal relationships, team dynamics, and overall workplace inclusivity.





In today's globalized corporate landscape, the traditional goal of achieving cultural competence—fully understanding and navigating a culture in its entirety—is becoming increasingly unrealistic, which makes cultural intelligence particularly important for managing the Hispanic workforce. Hispanics in the United States come from over 24 different countries, each with its own unique culture, traditions, and social norms. This diversity within the Hispanic community means that a one-size-fits-all approach to cultural competence is inadequate. Leaders need to develop a nuanced understanding and an adaptable approach to effectively manage and engage Hispanic employees.



A comprehensive cultural intelligence developmental process that includes training, coaching, mentoring, and hands-on experience is essential. Research highlights the critical role of cultural intelligence in enhancing team performance over time. A study investigating multicultural teams found that cultural diversity within teams can initially challenge performance. However, teams with higher levels of CQ showed significant performance improvements over time, demonstrating that CQ alleviates the adverse effects of cultural diversity and enables teams to harness the benefits of diverse perspectives more effectively. This underscores the importance of developing CQ within multicultural teams to foster better collaboration and performance outcomes. By appreciating and leveraging the rich cultural diversity of their Hispanic workforce, leaders can foster an inclusive environment where all employees feel valued and understood.

FEATURE	CULTURAL COMPETENCE	CULTURAL COMPETENCE
FOCUS	Specific Culture	Diverse Cultures
DEVELOPMENT	Learn & Apply	Ongoing & Adaptable
COMPONENTS	Knowledge & Skills	M.K.S.A
GOAL	Function Effectively	Thrive Across Cultures
REAL EXAMPLE	Healthcare Worker	Global Team Leader



Feature	Cultural Competence	Cultural Intelligence
<p>Focus</p> 	<p>Knowledge and skills to function effectively in a specific cultural context</p>	<p>Ability to adapt and thrive across various cultural contexts</p>
<p>Development Linear Progression</p> 	<p>Achieved through learning about a specific culture.</p>	<p>More dynamic and ongoing. Develops through experience and continuous learning across cultures.</p>
<p>Components</p> 	<p>Cultural awareness Cultural knowledge Cultural sensitivity</p>	<p>CQ Framework:</p> <p>Drive: Motivation to engage with different cultures.</p> <p>Knowledge: Understanding cultural practices and values.</p> <p>Strategy: Ability to plan and approach interactions in different cultural settings.</p> <p>Action: Adapting behavior and communication for effective cross-cultural interaction.</p>
<p>Goal</p> 	<p>Function effectively within a particular cultural environment</p>	<p>Navigate and succeed in a variety of cultural situations</p>

Real-World Case Study

INSIGHT 1

Consider Susan, a CEO who oversees operations across more than 60 countries. Managing teams in 15 different nations, it is impractical to expect her to become culturally competent in all these cultures. This is where cultural intelligence becomes crucial.

Overnight, due to an ambitious global merger, Susan found herself at the helm of a newly expanded team. The challenge was monumental; Suddenly, cultural competence, where you're an expert in every culture, felt impossible. She needed a system, a structured approach to bridge the vast cultural divides within her team.

Susan understood that leading her diverse team to success meant embracing the myriad of cultures now under her guidance. Her drive stemmed from a belief in the transformative power of diversity—not just as a requisite for innovation but as a core pillar of her leadership philosophy. She saw this challenge not as a burden but as a privileged opportunity to grow, both personally and professionally.





Finding the Drive Within

Step #1

Elevation Question: "What's my motivation for learning about different cultures?"

Recognizing the critical need for a deep cultural understanding, Susan embarked on a journey of learning. She delved into the norms, values, and practices of the countries her team members hailed from. Understanding the nuances of direct versus indirect communication became crucial. Susan learned that what constitutes assertive feedback in one culture might be perceived as rude or dismissive in another. This knowledge was pivotal in navigating her team's diverse communication styles, helping her tailor her approach to feedback and dialogue.

Building a Foundation of Knowledge

Step #2

Elevation Question: "What cultural understanding do I need?"

Armed with motivation and knowledge, Susan then turned to strategy. She knew success lay in thoughtful planning for cultural interactions. Recognizing the varied preferences around authority, from hierarchical to egalitarian, and the spectrum from task-oriented to relational working styles, Susan devised a multifaceted strategy. She introduced flexible communication platforms to cater to different preferences, and instituted regular, culturally sensitive team-building exercises aimed at fostering a shared identity. Susan emphasized the importance of inclusive decision-making, ensuring every voice was heard and valued.

Having a Strategy

Step #3

Elevation Question: "How can I plan to adapt?"

Adaptability was Susan's final frontier. She embraced the fluidity required to adjust her leadership in real-time. Susan became adept at switching between direct and indirect communication, depending on the cultural context. She showed an incredible ability to balance between being task-oriented and relational, understanding when to focus on the task at hand and when to invest time in building relationships.

Adaptability

Step #4

Elevation Question: "How do I execute my plan?"

The journey was not without its hurdles. Providing feedback across cultures posed a significant challenge. Susan learned to navigate these waters carefully, ensuring her feedback was constructive and culturally sensitive. She also tackled issues related to decision-making styles, recognizing and respecting the varying degrees of comfort with authority and autonomy across her team.



Recommendation

Leverage the unique cultural strengths of your Hispanic workforce with an integrated approach to cultural intelligence.

1. Focus on understanding Cultural Intelligence.

Research shows that higher levels of cultural intelligence are linked to better job performance, improved interpersonal skills, and more effective leadership in multicultural settings.assistant with strong project management abilities.

2. Implement an experiential Cultural Intelligence developmental program.

Effective Cultural Intelligence training should include experiential learning, role-playing, and real-world scenarios that help employees develop practical skills in cultural adaptability and communication.



INSIGHT 2

Insight 2:

Leverage Representation

A 2016 Coqual study revealed that 76% of Latinos repress aspects of their authentic selves in the workplace, altering their communication style, leadership presence, and body language to fit in and advance professionally.

More than three out of four (76%) expend energy repressing parts of their personas in the workplace. They are covering or downplaying who they are, modifying their appearance, their body language, their communication style, and their leadership presence. Latinos who expend a great deal of energy repressing aspects of their personas at work are more likely to strongly agree that they are being promoted quickly.

In today's corporate landscape, merely increasing representation is often seen as the goal. However, true progress lies in leveraging the existing representation within your organization. Many companies find themselves with Hispanic employees concentrated in lower ranks, a challenge frequently encountered across various industries. The key insight here is to focus on the talent you already have and create pathways for their advancement.

An effective strategy is to implement an accelerator program specifically designed for Hispanic employees. This program should combine mentorship, sponsorship, and rotational leadership roles, equipping them with the tools, techniques, and competencies necessary to lead teams and manage larger projects. By doing so, organizations not only boost the career trajectories of these employees but also enrich their leadership pipeline with diverse, culturally intelligent leaders.

This approach goes beyond merely increasing numbers; it's about recognizing and nurturing the potential within your organization. Some forward-thinking organizations are already adopting this strategy and seeing significant benefits in terms of employee engagement and leadership diversity. By leveraging the representation you have, you create a dynamic environment where Hispanic employees can thrive and drive your organization forward.





Real-Life Case Study:

Leveraging Representation at Dell Technologies

INSIGHT 2

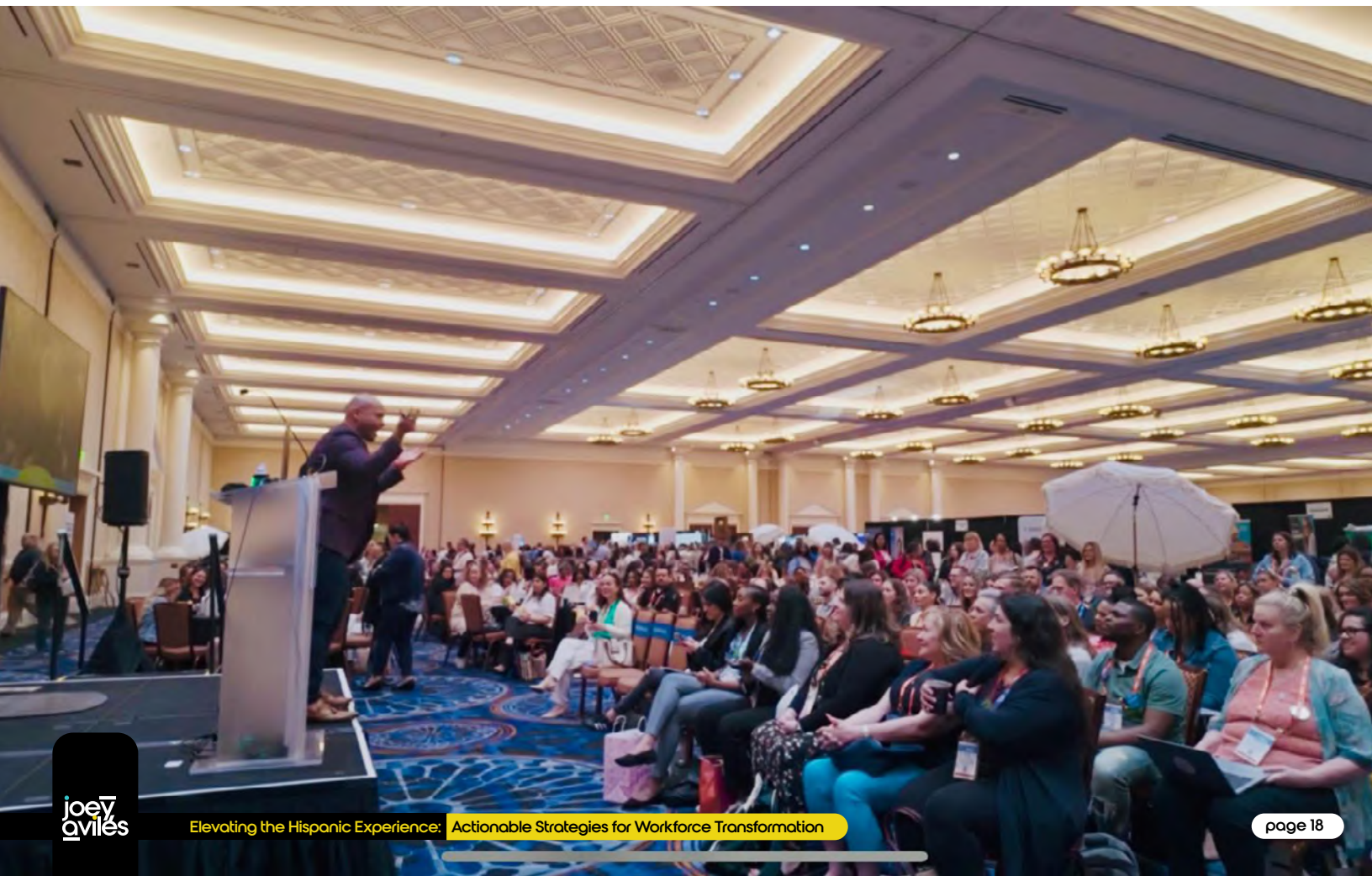
In my recent engagement with Dell Technologies, I was invited to deliver a virtual keynote titled **“LatinX Leadership: How to Use Persuasion and Influence Across Generations, Cultures, and Differences to Achieve Business Outcomes.”** This session was aimed at Latinx directors and aspiring leaders within the company, focusing on enhancing their abilities to lead and inspire change through the power of inclusion.

One of the key topics we explored was the importance of leveraging representation to drive business success and foster an inclusive workplace culture. A prime example of this principle in action is Dell Technologies’ Hispanic employee resource group, Latino Connection. This year, the group sponsored a pilot program with the Diversity and Inclusion team called the LatinX Director+ Cohort. This initiative addresses the challenges of retaining a diverse talent pipeline by providing Latino employees with opportunities for professional growth and development.



The program, which launched with 25 key personnel, helps keep Latino employees engaged by expanding their skillset through external coaching, guest speaker presentations on breaking through leadership barriers, and roundtables with executive leadership team members. This approach ensures that new hires are not only welcomed into a diverse environment but also have access to the support and advocacy needed for their continued development. As one participant noted, **“Mentors are like great team coaches—they support and advise you. But advocates are like fans. Advocacy and inclusion are key for retaining talent.”**

This real-life example demonstrates that representation is not just a matter of equity but a strategic advantage that drives organizational success. By embedding representation into leadership development, Dell Technologies is promoting diversity and leveraging it to achieve greater business outcomes. This approach illustrates the tangible benefits of an inclusive leadership strategy, where diverse perspectives and experiences contribute to the overall growth and innovation of the company.



Recommendation

INSIGHT 2

Turn representation into action by leveraging your existing Hispanic workforce to build a dynamic leadership pipeline with a Hispanic targeted accelerator program. This program would combine mentorship, sponsorship, and rotational leadership roles, equipping them with the tools, techniques, and competencies necessary to lead teams and manage larger projects. By doing so, you not only boost their career trajectories but also enrich your leadership pipeline with diverse, culturally intelligent leaders.

1. Identify Leaders Early: Unearthing Hidden Gems in Overlooked Roles

Implement a Talent Scout Initiative across all levels and functions, with a particular focus on historically overlooked occupations such as administrative support, technical services, and frontline workers.

- **Talent Scout Teams:** Form cross-functional teams of Talent Scouts composed of managers, senior leaders, and HR personnel who are trained to recognize leadership potential in non-traditional roles.
- **Skill Diversification Program:** Create an internal platform where employees can showcase skills that may not be evident in their current roles. For example, a maintenance worker with excellent organizational skills or an administrative assistant with strong project management abilities.





2. Measurement and Accountability: Building a Career Advancement Roadmap

Develop a comprehensive tracking and advancement system focused on front-line occupations, especially in trades and technical roles where career progression is traditionally limited.

- **Data-Driven Insights:** Utilize advanced analytics to map the current workforce distribution, identifying areas with high Hispanic representation. Leverage this data to uncover trends, opportunities, and potential barriers to advancement.

- **Career Advancement Roadmap:** Create clear, structured career advancement roadmaps that outline potential career paths from entry-level to senior positions. These should include necessary skills, training programs, certifications, and experiential milestones.

- **Skill Transition Programs:** Develop programs that allow employees in trade roles to transition into managerial or technical positions. For example, a welder could transition into a project manager role through targeted training in project management and leadership skills.

- **Transparent Progress Tracking:** Implement a transparent tracking system where employees can see their progress along the career roadmap, receive feedback, and understand the steps needed to advance. Use gamification elements to make this tracking engaging and motivating.

- **Annual Mobility Reports:** Publish annual reports on employee mobility and career progression, highlighting success stories and areas for improvement. This keeps the organization accountable and motivated to continuously improve the career advancement ecosystem.

3. Hispanic-Centered Leadership Development Program with High Potential Component:

Design a cutting-edge leadership development program specifically tailored to Hispanic employees, leveraging cultural strengths and addressing unique challenges, with a special focus on identifying and nurturing high-potential individuals.

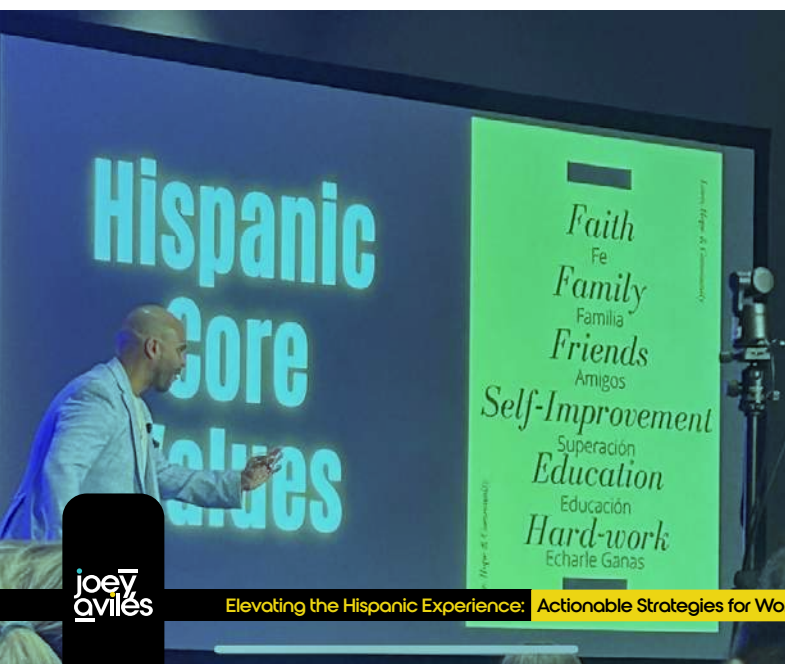
- **Cultural Immersion Modules:** Develop modules that incorporate Hispanic cultural values such as familismo (importance of family) and colectivismo (focus on community). Use these strengths to build leadership styles that resonate with Hispanic employees.
- **Shadowing and Exchange Programs:** Implement shadowing programs where Hispanic employees can spend time with senior leaders to gain firsthand experience of leadership in action. Additionally, create exchange programs with other departments or partner organizations to broaden exposure and networks.

- **Leadership Bootcamps:** Design intensive, immersive leadership bootcamps that focus on real-world challenges, strategic thinking, and resilience. Include sessions with Hispanic leaders from various industries to provide role models and inspiration.

- **Community Impact Projects:** Encourage participants to engage in community projects that have a direct social impact. This not only hones leadership skills but also strengthens the connection between personal values and professional growth.

- **Mentorship and Coaching:** Programs that connect Hispanic employees with experienced mentors can provide guidance and support, helping them navigate cultural challenges and advance in their careers.

- **Rotational Leadership Opportunities:** Provide Hispanic employees with opportunities to work in different departments and roles can enhance their understanding of the organization and develop their leadership skills through diverse experiences.





INSIGHT 3

Insight 3:

Prioritize Professional Development and Honor Global Education

In the diverse landscape of the Hispanic community, individuals come from over 24 different countries, each with its own educational systems and certification bodies. Often, highly skilled professionals such as doctors, engineers, and other certified experts arrive in the United States only to find that their qualifications are not recognized due to systemic barriers and discriminatory practices. This challenge hinders their professional advancement and underutilizes their talents.

Recognizing and valuing foreign education and experience is crucial for unlocking the full potential of this talent pool. Organizations should develop pathways that allow foreign qualifications to be translated and accredited to meet U.S. standards. This does not mean accepting every certification without scrutiny but rather establishing clear parameters and processes to validate and integrate these qualifications effectively.

By honoring global education, organizations can save significant resources in terms of retention and advancement. They avoid the unnecessary costs of re-certifying already skilled professionals and instead leverage their existing expertise. This approach not only enhances employee satisfaction and loyalty but also ensures that organizations are making the most of their diverse talent pool, leading to a more inclusive and productive workforce.

Implementing these strategies allows organizations to maximize the potential of their workforce, drive innovation, and stay competitive in a global market. Recognizing and valuing the diverse educational backgrounds and professional experiences of Hispanic employees is a strategic investment in the future of the organization.

Real-World Example

A prominent healthcare institution undertook a series of interviews to understand the needs and aspirations of its Hispanic workforce. A significant theme that emerged was the necessity of prioritizing professional development and recognizing global education credentials. These areas are critical in fostering a more inclusive and equitable workplace where diverse talents are acknowledged and nurtured.



Professional development is essential for creating a supportive and motivating work environment. As noted in the interviews, there is a pressing need for the healthcare institution to develop more inclusive policies that recognize and value the diverse educational backgrounds and experiences of their Hispanic workforce. One interviewee highlighted, “Even though they claim or, you know, they do hire Hispanic people... they don’t really take the time to understand how education works in our countries.” This statement underscores the gap in understanding and valuing foreign education credentials, which can lead to feelings of underappreciation and hinder career advancement.



Recognizing and valuing global education credentials is equally crucial. The diverse educational backgrounds of the Hispanic workforce at the healthcare institution contribute to a rich pool of knowledge and skills that can significantly enhance patient care and organizational performance. However, the current system often fails to fully utilize these skills.

INSIGHT 3

One interviewee shared, “Why is there nobody who looks like me at the top? We should look like the patients that we serve”. Another interviewee expressed frustration with the undervaluation of foreign education, stating, “Recognition of Foreign Education and Experience: experience challenge in having education and professional experience from country of origin recognized and valued equally compared to her American colleagues”. This sentiment highlights the need for a more inclusive approach to leadership development that considers the unique experiences and qualifications of international professionals. By honoring

global education and creating pathways for career advancement, the healthcare institution can cultivate a diverse leadership that reflects the community it serves and drives positive change within the organization.

Prioritizing professional development and honoring global education are vital strategies for fostering an inclusive and equitable environment at a prominent healthcare institution. These initiatives not only empower the Hispanic workforce but also enhance the overall quality of care and organizational success.

Recommendation

INSIGHT 3

Save resources, enhance productivity, and build a competitive workforce by establishing clear accreditation pathways and support systems for foreign certifications, ensuring the recognition and integration of globally educated Hispanic professionals.

Create Inclusive Corporate Policies:

Develop and implement corporate policies that actively support the recognition of foreign qualifications and provide equal opportunities for career advancement. This can include revising job descriptions to be more inclusive of diverse educational backgrounds.

Implement Targeted Training and Bridging Programs:

Offer bridging programs that help foreign-trained professionals gain the necessary credentials and skills to meet local requirements. These programs can include supplemental courses, exams, and professional development workshops.

Develop Clear Accreditation Pathways:

Establish a structured process for evaluating and accrediting foreign certifications and degrees. This can include partnerships with educational institutions and professional bodies to ensure that foreign qualifications meet U.S. standards.

Advocate for Policy Changes and Support:

Work with policymakers and industry groups to advocate for more inclusive policies that recognize foreign qualifications. This can include lobbying for changes in licensing requirements and professional standards.

Insight 4:

Prioritize the Hispanic Experience in DEI Initiatives



When focusing on the Hispanic workforce, it is crucial not to let their unique experiences be diluted within general DEI initiatives. The Hispanic experience should be given special attention to ensure that their specific needs and perspectives are addressed effectively.

By tailoring DEI strategies to highlight and honor the Hispanic experience, organizations can avoid the pitfalls of a one-size-fits-all approach and foster a truly inclusive environment.

Instead of creating separate, high-visibility DEI programs, DEI principles must be seamlessly integrated into every aspect of the organization, from marketing to product development. This ensures that DEI is not perceived as an isolated HR effort but as a fundamental component of the business strategy. This approach envisions a future where DEI is embedded so deeply within the organization's culture and operations that it becomes an undetectable yet vital part of the business's DNA.

One of the key challenges in the current DEI landscape is the performative nature of many initiatives, which can lead to backlash and skepticism. To counter this, DEI must be managed by everyone in the organization, making it an integral part of everyday practices and decisions. This holistic integration requires a strategic framework that empowers all employees to embody DEI values in their roles, making DEI an inherent part of the organizational fabric.

By focusing on the unique Hispanic experience within DEI initiatives, organizations can create more targeted and effective strategies. This involves preparing and equipping executives with the necessary DEI behaviors, competencies, and skills to enhance their awareness and impact. When leaders fully understand and embrace these principles, it will significantly benefit the Hispanic workforce and the organization.

Prioritizing the Hispanic experience within DEI initiatives means embedding these principles into every business function and tailoring strategies to address specific needs. This ensures DEI is not just an HR responsibility but a core element of the organization's strategy, creating a truly inclusive environment that supports and uplifts all employees.





Real-World Case Study:

Prioritizing the Hispanic Experience at UNC Health

INSIGHT 4

Recognizing the importance of Hispanic inclusivity, UNC Health organized a comprehensive two-day event focused on enhancing the Hispanic experience within its system.

The event featured three key sessions: ERG Excellence: The Key to Unlock Growth, Unleash Innovation, and Drive Impact; Hispanic, Latinx, Latine, Latina/o: What Every Healthcare Leader Needs to Know to Nurture Hispanic Inclusivity and Excellence; and The Juntos Podemos Strategic Plan Meeting: Elevating Equity and Inclusion for the Hispanic Community at UNC Health. These sessions explored best practices for ERGs, provided healthcare leaders with essential knowledge to support Hispanic inclusivity, and developed a strategic plan to improve the experiences of Hispanic and Latin American teammates, patients, and community members.

The two-day event led to significant outcomes, including an enhanced understanding of Hispanic cultural competencies, strategic integration of inclusivity into core strategies, and a focus on the Hispanic market for growth





INSIGHT 4

and innovation. Participants gained insights into delivering world-class care to the Hispanic community, recognizing that inclusivity efforts must go beyond cultural celebrations and be embedded into the organization's core strategies. Leaders acknowledged the essential role of the Hispanic market in driving growth and innovation, making it a strategic priority for UNC Health.

UNC Health's dedication to improving the Hispanic experience serves as an inspiration and a model for other healthcare organizations striving to foster inclusivity and equity in their communities. This commitment demonstrates that prioritizing the Hispanic experience within DEI initiatives can create a truly inclusive environment that supports and uplifts all employees.

Recommendation

INSIGHT 4

Ensure your DEI initiatives effectively prioritize the Hispanic experience by conducting comprehensive cultural assessments, developing tailored training programs, supporting Hispanic ERGs, and integrating specific DEI metrics into business goals.

Conduct In-Depth Hispanic Cultural Assessments:

Perform comprehensive cultural assessments to understand the specific needs, challenges, and strengths of Hispanic employees within your organization. Use surveys, focus groups, and interviews to gather detailed insights.

Develop Tailored DEI Training Programs:

Create DEI training programs that specifically address the Hispanic experience. These programs should focus on cultural competency, awareness of systemic biases, and practical skills for creating inclusive environments.

Implement Hispanic Employee Resource Groups (ERGs):

Establish and support Hispanic ERGs to provide a platform for Hispanic employees to share their experiences, network, and influence organizational policies. Ensure these groups have executive sponsorship and adequate resources.

Integrate Hispanic Metrics into Business Goals:

Incorporate specific DEI metrics related to the Hispanic workforce into your organization's overall business goals and performance reviews. Track progress on hiring, retention, promotion rates, and employee satisfaction.



This is my family. The survivors. The dreamers. To them I dedicate our first research paper. May their joy, resilience and love continue to inspire audiences across the world.

INSIGHT 5

Insight 5:

Cultivate Adaptive and Inclusive Leadership

To effectively lead and support the Hispanic workforce, it is essential to cultivate leadership that goes beyond inclusivity and embrace adaptability and agility. One question every executive and leader are constantly asking is: Are we ready for the next crisis?

For over 15 years, Joey has delivered more than 200 insightful, inspiring, and research-focused Hispanic focused keynotes. These experiences have underscored the increasing importance of the Hispanic workforce and the urgent need for adaptive and inclusive leadership in today's diverse workforce. The ALIVE Method, developed from these extensive engagements, is designed to create leaders who are adaptive, learning-focused, inclusive, value-driven, and ready for whatever comes their way.

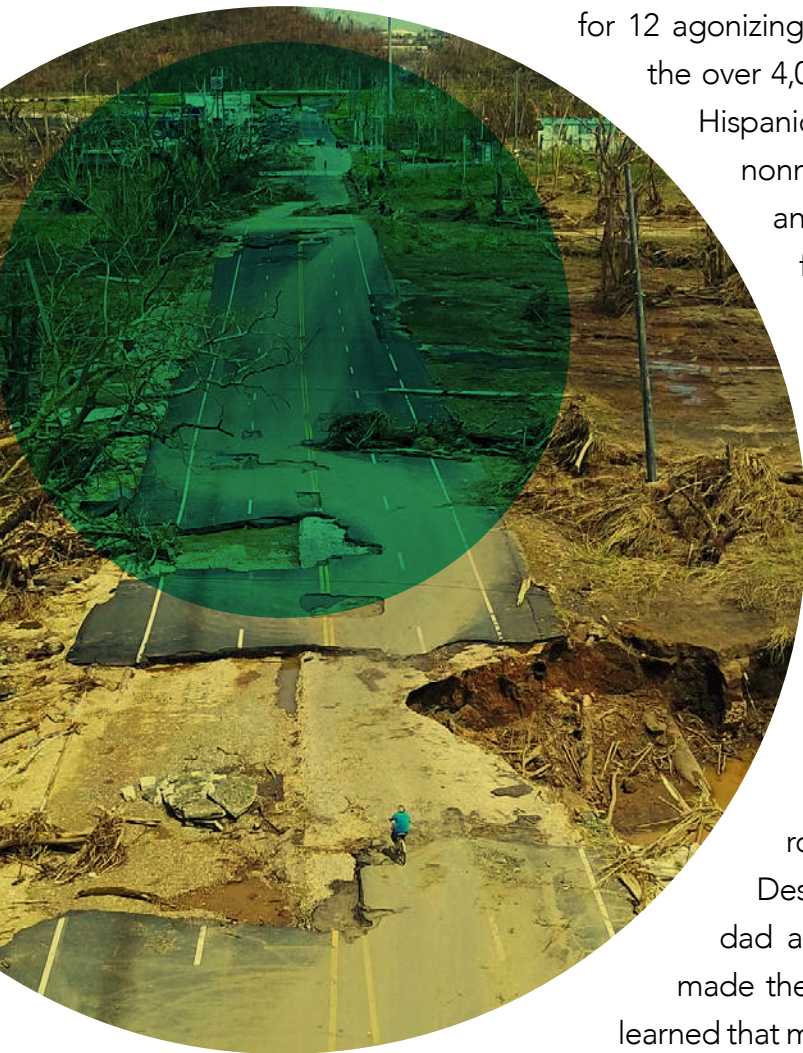
The ALIVE Method Genesis

INSIGHT 5

I am originally from San Sebastian, Puerto Rico, a small town in the mountains of the island's west side. Picture beautiful greenery, a fresh breeze, and a crisp sun. My family, known for their warmth and sense of community, lives close to each other, gathering daily to laugh, tell stories, and support one another.

In 2017, my family faced Hurricane Maria, one of the most catastrophic hurricanes in Puerto Rico's history. I was living in Washington DC at the time, and for 12 agonizing days, I didn't know if my mother was one of the over 4,000 people who perished. Anyone familiar with Hispanic mothers knows that daily communications are nonnegotiable. She would text me every single day, and if I didn't respond, I would be in trouble. But for those 12 days, I heard nothing from her. All we had were news reports of total destruction, floods, stories of lost relatives, and long lines for basic necessities. Day and night, I tried to contact my family, but Puerto Rico was literally in the dark.

One morning, I finally received a call from my dad, who lived 30 minutes away from my mom. We cried over the phone, and I begged him to find out how my mom was doing. Her house, located at the top of a hill, had a rustic roof that was vulnerable to the hurricane's force. Despite having to wait 12 hours for gasoline, my dad agreed without hesitation. On my birthday, he made the journey to San Sebastian. A few hours later, I learned that my mother had lost everything and had spent the hurricane without a roof.

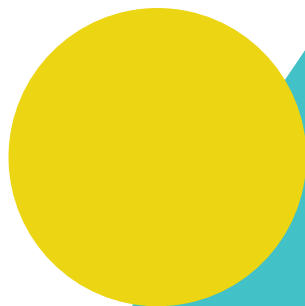




INSIGHT 5

Three months later, I secured tickets to visit the island for Christmas. As I traveled from San Juan to my hometown, I witnessed the extensive destruction. I arrived at my mom's house close to midnight, expecting only her to greet me. To my surprise, over 15 family members welcomed me with flashlights. From the back, my aunt yelled, "Llego la luz," which means "We got electricity again." They didn't actually have electricity; they were playing with flashlights, but they had managed to create a joyful atmosphere despite the darkness. My mom gave me a hug that only a mom can give and said, "Mijo, I have never faced such a crisis before, but as long as I am ALIVE, I will make it count."

That day, my family taught me one of the most disruptive lessons in my practice: In times of crisis, human connection and a sense of belonging are all that matter. When we belong, we believe. When we belong, we hope. When we belong, we literally come alive. This profound experience inspired me to develop the ALIVE Method.



The ALIVE Method Approach

INSIGHT 5

By embracing the ALIVE Method, organizations can develop leadership practices that effectively manage and leverage the diverse talents within their teams, ensuring that DEI initiatives are deeply embedded into the core business strategy. This approach fosters a truly inclusive and dynamic organizational culture, ready to face any crisis with resilience and unity.

1. Accelerate Awareness:

Encourage leaders to confront their own biases and blind spots, fostering a deeper understanding of diverse perspectives within the Hispanic community. This heightened awareness is crucial for creating an inclusive environment that respects and values cultural differences.

2. Leverage Belonging:

Cultivate a sense of belonging among Hispanic employees by recognizing and celebrating their unique contributions. Implement practices that allow them to express their authentic selves, breaking the mold of conformity and fostering a more inclusive workplace culture.

3. Integrate Well-being and Workload:

Balance the demands of work with the well-being of Hispanic employees. Recognize the cultural importance of family and community, and create policies that support work-life harmony. This approach not only enhances productivity but also ensures long-term employee satisfaction and retention.

4. Value Conflict:

Embrace conflict as an opportunity for growth and understanding. Train leaders to navigate and resolve conflicts effectively, using them as a means to uncover deeper issues and foster open dialogues. This approach helps in building a resilient and collaborative workforce.

5. Elevate Each Other:

Promote a culture of mutual support and upliftment. Encourage leaders to mentor and sponsor Hispanic employees, providing them with the resources and opportunities to advance in their careers. This collective effort ensures that everyone rises together, creating a more dynamic and supportive organizational environment.

By integrating the ALIVE Method, organizations can develop leaders who are not only inclusive but also adaptive and agile, capable of effectively managing and leveraging the diverse talents of the Hispanic workforce. This approach ensures that DEI initiatives are deeply embedded into the core business strategy, fostering a truly inclusive and dynamic organizational culture.





Real-World Case Study:

Deploying the ALIVE Method at Ulta Beauty

INSIGHT 5

Ulta Beauty, a leader in the retail beauty industry, sought to strengthen its internal culture and align its marketing department with the company's ambitious growth and diversity goals. To achieve this, the Chief Marketing Officer, a visionary leader with a background in driving change, invited me to present a keynote showcasing the ALIVE Method. This five-pillar framework was designed to enhance awareness, leadership, inclusion, vision, and engagement within organizations.

The deployment of the ALIVE Method within the Marketing Department at Ulta Beauty began with accelerating awareness among the marketing leadership team. Given Ulta Beauty's global reach and commitment to diversity, cultural intelligence was prioritized. This foundation enabled the team to navigate and embrace diverse perspectives effectively, fostering a more inclusive and dynamic work environment.

The initial success with the executive team led to a broader engagement, encompassing over 300 marketing professionals within the organization. The understanding of the ALIVE Method contributed to enhanced team cohesion, strategic alignment, and ultimately, a series of industry awards and recognitions.

The ALIVE Method's pillars within Ulta Beauty's marketing department improved internal dynamics and contributed to the company's outstanding market performance and recognition. This case study underscores how the ALIVE Method can be customized to fit any organizational context, providing leaders with a reliable roadmap for navigating complex challenges and achieving sustainable growth.

By mastering these five pillars, leaders can ensure their organizations are prepared to face any situation with resilience and confidence, driving success across all levels of the organization.

Recommendation

INSIGHT 5

There are two key ingredients to embrace adaptive and inclusive leadership: the power to understand our life experiences and the capability of sharing those experiences with others. The ALIVE Method showcases over 10 different exercises under a journey of 5 pillars. To get your journey started, we are showcasing a set of powerful questions that will equip you to accelerate your own awareness. But we are not stopping there. The goal of this white paper is to help you think about the Hispanic Experience you have lived or to gain a better understanding of the experiences Hispanics are having around you. Here are a set of questions you can ask yourself and in turn, ask others.

Self-Reflection Questions:

1. Cultural Influence:

How has your heritage shaped your values, traditions, and everyday life?

2. Representation:

In what ways do you see your cultural identity represented in your community and workplace, and how does that impact you?

3. Family and Community:

How does your family and community support or influence your personal and professional goals?

4. Challenges and Overcoming:

What specific challenges have you faced related to your identity, and how have you worked to overcome them?

5. Future Aspirations:

How do you envision the future for yourself and for your community, and what role do you see yourself playing in that future?



Creating Conversations:

INSIGHT 5

The power of answering the questions above can be multiplied by sharing our experiences, by sharing our stories. We can take a step forward by truly listening to the stories of others and finding ways to amplify them across our workplaces and communities. Here are some questions you can use to lead a conversation that will help create a sense of belonging.

1. Cultural Sharing: Can you share a story about a tradition or value from your culture that has significantly impacted your life?

2. Representation and Visibility: How do you feel when you see people from your cultural background in leadership positions or portrayed in the media?

3. Support Systems: Who in your family or community has been a major support for you, and how have they influenced your journey?

4. Overcoming Obstacles: What is a significant challenge you have faced because of your cultural background, and what did you learn from that experience?

5. Vision for the Future: What changes would you like to see in your community or workplace to better support people from diverse backgrounds?

By fostering inclusive storytelling, we create opportunities for Hispanic employees to share their personal and professional stories. This practice celebrates Hispanic diversity and fosters a deeper understanding among all team members. Adaptive leaders can use these stories to identify and address common challenges, making the workplace more inclusive and supportive. Integrating these adaptive and inclusive leadership practices can create a more equitable and supportive environment for all. The ALIVE Method is a journey of understanding, sharing, and growth. Let's take this journey together, embracing the richness of our diverse experiences and creating a future where everyone feels valued and included.

The ALIVE Method has proven to be a transformative framework, capable of adapting to various industries and addressing a wide range of organizational challenges. Organizations across various industries, including private sector companies, non-profit organizations, government agencies, and academia, have successfully implemented the ALIVE Method, showcasing its versatility and effectiveness. Whether navigating a crisis, aiming for growth and expansion, or managing through a national scandal or lawsuit, the five pillars of the ALIVE Method provide a robust foundation for leadership and organizational success. These steps are essential for every leader to master throughout their careers.



Conclusion





Our ability to fully grasp the nuanced depth of Hispanic stories will determine how we grow in the future.

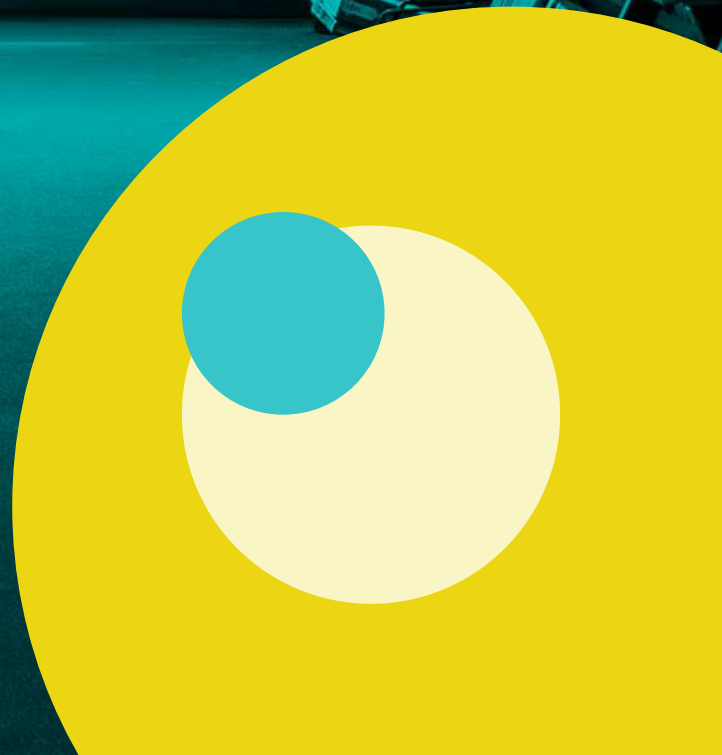
CONCLUSION

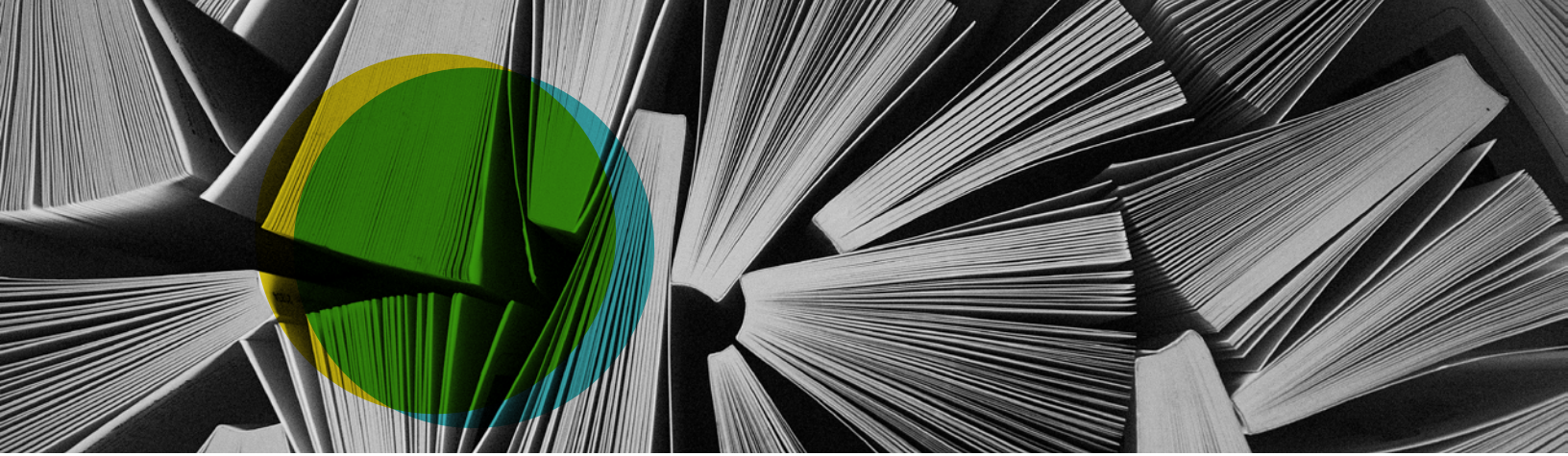
This white paper highlights the importance of addressing cultural competence, representation, and professional development for Hispanic employees. Organizations can create a more inclusive and equitable workplace by implementing the recommended strategies.

Senior executives and DEI leaders must prioritize these strategies to drive meaningful change. Immediate steps include assessing current practices, setting clear diversity goals, and fostering an inclusive culture.

Embracing diversity and promoting equity is not just a moral imperative but a strategic advantage that drives innovation enhances performance and creates a more resilient organization.

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Methodology

METHODOLOGY

This white paper is based on 150 structured interviews conducted to understand the needs and aspirations of a diverse workforce, particularly within the Hispanic community. Each interview lasted between 15 to 60 minutes and followed a standardized protocol with open-ended questions. These questions aimed to gather insights into professional backgrounds, specific challenges, and the perceived success of strategic sessions led by Joey Avilés.

Key questions included:

- 1- Can you provide an overview of your professional background and current role?**
- 2- Are there specific challenges or pain points your organization is currently grappling with?**
- 3- How would you complete the following statement: "The session led by Joey Avilés was successful because it enabled us to achieve..."**
- 4- Is there any additional information or context you would like to share that could further inform the customization of our solution?**

The participants held a range of roles, including professionals from an array of industries, administrative staff, ERG leaders, and executives, with diverse educational backgrounds and extensive experience in their respective fields. Interviewees hailed from various cultural backgrounds, providing a broad perspective on the challenges faced.

Data from transcripts were analyzed using Advanced Data Processing Techniques for summarization. Subject matter experts reviewed the output to ensure the themes and findings accurately reflected participants' voices. This approach ensured efficiency while maintaining the integrity of the participants' insights, forming the foundation for this research.



About the Author



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Recognized as a LinkedIn's Racial Equity Top Voice, 2021 Top 15 Champion of Diversity by Diversity Global Magazine, a Top 100 Executive Leader by Diversity MBA Magazine, and featured as an Inclusion Innovator by the Society of Human Resources Management (SHRM).

Joey is the Founder and Chief Belonging Officer of MJA & CO, LLC, a Minority-owned consulting firm helping leaders leverage Diversity, Equity & Inclusion as a catalyst to increase engagement, innovation, and retention.

Joey served as the first civilian Chief of Diversity and Inclusion in the history of the US Coast Guard. During his tenure, he directed two historical research studies; Why Do Women Leave the Coast Guard, and What Can Be Done to Encourage Them to Stay?; and Improving the Representation of Women and Racial/Ethnic Minorities Among U.S. Coast Guard Active-Duty Members.

He is a DEI Thought Leader with over 15 years of experience serving clients like ULTA Beauty, Boeing, Dell Technologies, Ferrara, University of Phoenix, Highmark Health, Peace Corps, FDIC, FDA, NIH, Department of Defense, Department of Interior, Department of Homeland Security, and other organizations. Joey is a TEDx speaker featured at the Washington Post, the Chicago Tribune, Telemundo, the Change Management Conference, the Human Capital Institute, the SHRM Talent Management, and D&I Conferences.

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Let's Make It Count.