

Summer NDI Board Meeting: June 23-24, 2022



nationaldisabilityinstitute.org

Agenda at a Glance: Day 1

- Welcome (Mike): 10:00am – 10:45am
 - Formally open the June 2022 NDI Board meeting (Mike): 5 -10 minutes
 - Introductions- each board member introduces themselves and shares what they'd like to get from the meeting and how they'd like to support NDI (2-3 minutes/board member): 35-40 minutes total
- Break: 10:45am – 11:00am
- COVID impacts – Rich Clement from Smith Group (Jessica): 11:00am – 12:00pm
- Review and approve April 2022 board meeting minutes (Mike): 12:00pm – 12:15pm
- Finance Update (Susan): 12:15pm – 12:25pm
- Executive Director Update (Tom): 12:25 – 1:00pm
- Break: 1:00pm – 2:30pm
- Deep Dive on Small Business program (Tom & Michael M.): 2:30pm – 3:30pm
- Policy Update (Michael M.): 3:30pm – 4:30pm
- Recap of Day 1, preview and expectations for Day 2, including board member feedback/suggestions and adjourn (Mike): 4:30pm – 4:45pm

**Welcome, Opening, & Introductions
(Mike): 10:00am-10:45am**

Break: 10:45am-11:00am

**Review & Approve April 2022
Board Meeting Minutes (Mike):
12:00pm-12:15pm**

- Additional Note from Tom for this section: The Board needs to make a “General business declaration”

**Finance Update (Susan):
12:15pm-12:25pm**

Financials

National Disability Institute Five months ending May 31, 2022

<i>Unaudited and Preliminary</i>	Budget 2022	YTD Budget	YTD Actual
Income			
Federal Grants & Contracts	\$ 2,603,008	1,084,587	775,464
State Grants & Contracts	170,169	70,904	549,296
Private Grants & Donations	1,685,750	702,396	2,286,005
Other Income	716,752	298,647	261,506
Rollover Funds (Donor Restricted)	260,000	108,333	
Total Income	5,435,679	2,264,866	3,872,271
Expenses			
Personnel			
Staff	3,007,508	1,253,128	1,208,542
Benefits	601,502	250,626	231,350
Total	3,609,010	1,503,754	1,439,892
Consultants			
Other Professional Fees	212,007	88,336	7,332
Project Consulting Fees	55,250	23,021	65,997
Subcontractors	726,000	302,500	263,750
Website Development & Support	52,200	21,750	34,878
Total	1,045,457	435,607	371,956
Travel & Meeting Expenses			
Travel	20,000	8,333	922
Meetings & Conference Expense	6,320	2,633	13,934
Total	26,320	10,967	14,856
Program Expenses			
Disability Accomodations	60,682	25,284	16,926
Printing & Reproduction	5,600	2,333	2,433
Direct Program Expense	121,920	50,800	6,832
Total	188,202	78,417	26,191
Operating			
Rent	168,000	70,000	66,120
Equipment Lease	4,924	2,052	2,747
Telephone	47,342	19,726	7,268
Supplies	34,898	14,541	4,742
Postage & Courier	2,610	1,088	871
Dues/Subscriptions	24,310	10,129	16,859
Insurance	14,800	6,167	1,988
Registration Fees	800	333	4,832
Technology	9,588	3,995	4,745
Communications & Internet	61,166	25,486	18,934
Other	137,580	57,325	17,456
Total	506,018	210,841	146,562

National Disability Institute Balance Sheet Tuesday, May 31, 2022

<i>Unaudited and Preliminary</i>	Detail	Sum
ASSETS		
Current Assets		
Total Checking and Money Market accounts		\$3,844,789
Accounts Receivable		
Standard Accounts Receivable	(1) 1,740,280	
Grants Receivable	(1) 119,610	
Other Current Assets		
Other Current Assets	36,553	
Total Current Assets		\$5,741,231
Office/Computer Equipment less depreciation	9,072	
Leasehold Improvements less depreciation	34,932	
Total Fixed Assets		44,004
Other Assets		
Life Insurance Annuity	347,786	
Total Investments		347,786
Security Deposit		11,073
Total Other Assets		359,659
TOTAL ASSETS		\$6,144,095
LIABILITIES & NET ASSETS		
Current Liabilities		
Accounts Payable	241,146	
Deferred Revenue	(2) 370,717	
ADEN Payables	(3) 639	
Accrued Vacation, Taxes & Benefits	286,227	
Total Current Liabilities		898,728
Total Liabilities		898,728
NET ASSETS		
Cash Reserve	(4) 641,222	
Permanent/Temp Restricted Net Assets		2,732,132
Net Surplus (Deficit)		1,872,013
TOTAL NET ASSETS		5,246,167
TOTAL LIABILITIES & NET ASSETS		\$6,144,095

Notes to the Balance Sheet

- (1) Accounts Receivable are due from various funders across various projects and Grants Receivable is NIDILRR Project.
- (2) Represents, funds provided for multi-year projects that have been deferred to be recognized when we spend it, as per the auditors recommendation.
- (3) ADEN Payables due to members.
- (4) Calculation provided in separate document.

Financials Continued

Reserved Financial Reserve Calculation
National Disability Institute
As of May 27, 2022

Cash in bank \$ 3,550,636.33

Less: Funding with Private Restrictions

Bank of America	209,622.21
Bank of America - EI	93,899.64
Prudential	185,356.61
Wells Fargo	243,975.84
WF - Financial Health & WF SB Convening	350,095.91
Metlife Foundation	296,789.69
Citi Foundation	487,754.87

Subtotal of Funding w/Private Donor Restrictions **1,867,494.77**

Less: Funding with Internal Restrictions:

SSA Administrative Pymts (ADEN Restricted) \$ 287,302.50

Less: Funding with Public Donor Restrictions:

SBA Funding	-
AT Loan	754,617.04

Estimated Cash Reserve @ 5/27/22 **\$ 641,222.02**

Previous Cash Reserve #'s

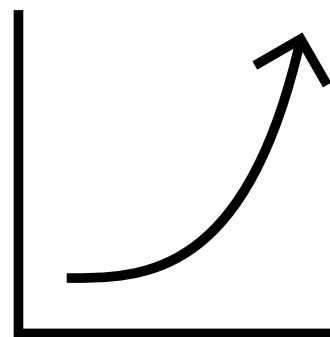
4/29/2022	\$ 899,774.71
3/31/2022	\$ 948,037.54
2/25/2022	\$ 1,076,808.37
1/22/2022	\$ 1,070,832.55
12/23/2021	\$ 747,397.15
11/30/2021	\$ 517,833.46
10/31/2021	\$ 527,044.66
9/30/2021	\$ 503,431.26
8/31/2021	\$ 608,433.31
7/31/2021	\$ 479,046.31
6/30/2021	\$ 431,266.02
5/31/2021	\$ 613,232.47
4/30/2021	\$ 485,602.37
3/31/2021	\$ 337,746.00



Executive Director's Report June 23-24, 2022

Financial Outlook 2022-2024

- Current State Strong Financial Position
- New funders
- Multi year projects
- General support
- Track Record
- Staff and Nimbleness
- Lead Center
- Economic Forecast



Marketing and Partnerships

- Free Conference Call
- Website Highlights Impact
- Increased and Boosted Social Media
- New Comms Digital Hire
- New Diverse Partnerships

Partnerships: Media

Tom Foley Media Interviews 2021/2022:

C-SPAN/Washington Journal

August 1, 2021

[Tom Foley on the Anniversary of the Americans with Disabilities Act](#)

Diverse

October 29, 2021

[Alpha Phi Alpha Partners with National Disability Institute](#)

Medill on the Hill

January 13, 2022

[Lawmakers: Elderly and Disabled Americans Struggle Most with Financial Literacy](#)

Business Insider

February 25, 2022

[Mobile banking lets you bank from anywhere, but may not offer as many services as traditional banking](#)

Kiplinger

April 27, 2022

[ABLE Accounts Give Disabled More Financial Freedom](#)

Mondato

May 10, 2022

[The Disabled Face AI-Driven Exclusion — Despite Huge Market Potential](#)

Overview of the Next Day and a Half

- Small Business
- Policy Update

- DEI Update
- Talent Discussion
- NDI Priorities
- Next Steps

Break: 1:00pm-2:30pm

NDI Board of Directors Meeting Small Business Update

Michael Morris

Senior Strategic Advisor

National Disability Institute

June 23-24, 2022

NDI Small Business Research Report

How many people with disabilities own small businesses?

- NDI estimates, using multiple data sources, that there are over 17 million self-employed individuals with disabilities nationwide.
- Of people who participate in the labor force, those with disabilities are more likely to be self-employed.
- Almost 17 percent of employed people with disabilities are self-employed compared with 11 percent of those without disabilities.
- A higher percentage of self-employment in working-age people with disabilities is observed in all age groups, as compared to working-age people without disabilities.

What has NDI research learned?

- While entrepreneurship is an important employment option for people with disabilities, they are hindered by limited access to affordable start-up capital and a scarcity of supports, services and programs tailored to their unique needs and challenges.
- Disability status is not captured on large national efforts (e.g., Census Bureau) to collect information on businesses or the more detailed annual small business surveys conducted by the Federal Reserve System.
- The lack of regular data collection by federal agencies about the size and impact of small businesses owned by people with disabilities results in less focus and attention to unmet needs of this targeted audience and limited attention by public and private funders.

Why do people with disabilities start small businesses?

- More flexible work schedule that meets their individual circumstances
- Challenges in traditional work environments
- Perceived lack of advancement opportunity
- Opportunity to be creative problem solvers and innovators

Challenges of Financing

- Smaller disability-owned businesses avoid traditional financing channels
 - Apprehension about providing personal guarantees and using personal assets as collateral
 - Will not qualify because of bad credit
 - Will not qualify because of lack of assets or benefit-related issues
 - The loan process is difficult
- SBA, banks not addressing disability needs (as they do other segments)

Other Key Findings

- Disability service delivery systems (Vocational Rehabilitation) offer limited technical expertise on starting a business
- SBA-funded centers (SBDCs, WBCs) have limited training and experience supporting entrepreneurs with disabilities
- Entrepreneurs with disabilities interviewed indicated preference for disability-managed incubators and accelerators

Recommendations

- Increase CDFI Fund targeting of resources for expanded CDFI lending to small businesses owned by people with disabilities
- Banks could set aside loan funds, as they have done for other targeted populations (women, Black and Latino small business owners)
- Establish a regional infrastructure to meet unique population needs
- Increase public and private certification of disability-owned businesses
- Invest CRA funds to support SVRAs to expand self-employment services
- Banks and the financial community could support public policy recommendations
 - Increase access to business opportunities, capital and support services for DOBEs being recognized by the SBA for 8a certification.
 - Improve the responsiveness and coordination of resources among federal agencies (SBA, RSA, Departments of Labor and Commerce) for small business development by people with disabilities.
 - Improve the collection, analysis and dissemination of data about small businesses owned by people with disabilities and their economic impact.
- Increase public and private data collection and reporting to track the growth and status of disability-owned businesses
- Drive integrated services to promote the financial stability and growth of DOBEs

Current Efforts in the Disability Community^{1 of 4}

Disability:IN

- Certification, Education & Business Development of disability-owned business enterprises (DOBEs)
- Connections with supplier diversity efforts at major companies
- Certified more than 300 DOBEs that generate annually over \$536 million in revenues

Current Efforts in the Disability Community

2 of 4

2Gether-International

1. Identification of business ideas supported by the individual strengths and interests of the entrepreneur.
2. Three-month online training in essential areas of business highlighting the intersection between business and disability advocacy.
3. Executive Leadership Coaching. In addition to the online training, each participant is paired one-on-one with an executive leadership coach who supports the entrepreneur's personal growth journey and achievement of personalized targets.
4. Virtual peer-mentoring from other project participants. On a weekly basis, virtual peer meetings occur for individual participants to discuss progress, work through challenges and support each other's goals and ideas.
5. Free legal assistance. All participants have access to free legal assistance provided pro bono from area law firms.
6. Benefits counseling.
7. Guidance on access to capital.

Current Efforts in the Disability Community 3 of 4

Disability Opportunity Fund

- CDFI making small business loans nationally
- Started in 2008 with \$397,000
- In 2015, launched Disability CDFI Coalition
- In 2021, established Disability Angel Fund and made first investments in five companies
- Now has more than \$60 million in assets

Current Efforts in the Disability Community

4 of 4

Life Asset

- CDFI and an approved SBA Microlender
- Provides microloans and training to low-income entrepreneurs in the Washington DC and Baltimore areas.
- Utilizes peer group lending model is inspired by the Grameen Bank using “social collateral” instead of traditional underwriting criteria.
- Services include: Microloans, financial and business training, peer-group support and office/retail space.
- Clients include: Low-income (100%), underemployed (57%), women (80%), immigrants (63%), ex-offenders (>5%), disabled (>8%), seniors (21%) and homeless (13%). Average Household Income: < 30% AMI.
- Currently support over 1,100 low-income entrepreneurs in the greater Washington DC area with microloans and training.

Community Navigator Pilot Program (CNPP)

Grant Information

- Funded by the SBA established by the American Rescue Plan Act of 2021
- Targeted to support underserved Entrepreneurs and Small Businesses
- Over 700 applicants, only 51 funded
- 51 grantees
 - 8 Tier 1 with National Scope
 - 11 Tier 2 with Regional scope
 - 32 Tier 3 with Local scope
- NDI is Tier 2 covering the DMV area (DC, Maryland and Virginia)
- NDI has the only project exclusively working with entrepreneurs and small business owners with disabilities
- \$2.5 Million over 2 years
- SBA Hub and Spoke model
 - 11 Spoke partners and
 - 14 collaborating organizations



CNPP Goals

- Support Entrepreneurs and Small Business owners with disabilities at any point of the Business Life-Cycle; concept, start-up, reopen, sustain, grow.
- Reduce barriers that underrepresented and underserved entrepreneurs often face in accessing the programs they need to recover, grow, or start their businesses.
- Improve the greater DMV area ecosystem of coordinated comprehensive small business development services and supports that are responsive and accessible to the needs of entrepreneurs and small business owners with disabilities.
 - The ecosystem include: financial assistance, access to capital, contracting and procurement assistance, marketing and communications, operations, management and business development, mentoring.

Partners



Success Story

[Client Spotlight - Small Business Hub \(disabilitysmallbusiness.org\)](http://disabilitysmallbusiness.org)

Tracy Pulliam

- **I.V.Y (*I Value You*) Transportation, LLC Washington, DC**
- **Industry:** Transportation
- **Year founded:** 2019
- **CNPP Assistance:** Business planning, marketing, procurement, ecommerce, taxes
- **Additional Partners:** DC SBDC, 2-GI, The DOF

Ms. Chavez provided Tracy with technical assistance in business development, digital media marketing, Ecommerce, and procurement. She also provided various small business resources, tools, and mentoring programs like the DSBDC, 2G-International, The Disability Opportunity Fund, and many others.

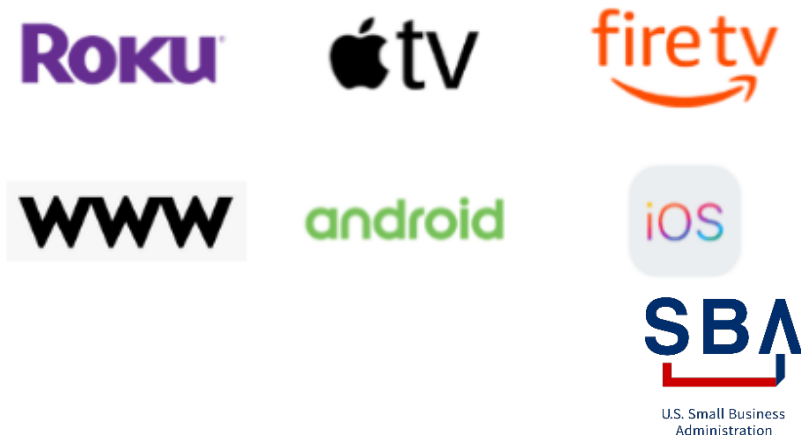
“I appreciate Ms. Ruth in introducing me with resources and networks to help me scale and grow my business. It has helped me to think positively and stay focus on my business goals and obligations” – Tracy

Disability Owned Streaming Channel

- Free streaming business affairs channel for business owners with disabilities located in the DMV region (Washington DC, Maryland, and Virginia).
- Delivers viable business information and resources to business owners with disabilities. Access free educational, financial, and motivational content that can help entrepreneurs with disabilities start, sustain, and grow a business enterprise.
- Available 24/7 in home or on the go.
- Free service on smartphones, tablets, computers, and connected TVs.
- Closed captioning on most videos.
- Voice command on most apps and devices.
- Go to the app store for your device to download an app or view on the [web](#).



Available To Watch On:



LULAC

- LULAC will launch a 2022 Latina Entrepreneur Academy aimed specifically at entrepreneurs with disabilities.
- Provide participants, who might not otherwise have access, with resources and skills necessary to be successful.
- A part of the LULAC Women's Empowerment (WE) Initiative designed to train, motivate, and inspire women, especially those of Hispanic descent, to succeed in all aspects of life.
- Funded under the Community Navigator Pilot Program (CNPP) grant from SBA.
- Open to all genders and ethnicities with a disability.
- 14-hour boot camp delivered over 8 weeks - June 24th, 2022 to August 26th, 2022.
- 2 academies with a minimum of 40 participants per academy.
- Topics will include: how to build a business plan, budgeting, marketing, networking, enhancing investor strategies that will better prepare entrepreneurs with disabilities to enter the business arena.
- This initiative will nurture the entrepreneurial spirit and provide support to participants who seek to launch and/or expand business endeavors.

Other Small Business Projects

- Chat Interview Show with Entrepreneurs with Disabilities (TD Bank)
- National Virtual Small Business Convening (Wells Fargo)
- Online Marketplace Feasibility Study (Wells Fargo)
- Training and Technical Assistance to CDFIs (Wells Fargo)
- Financial Health Training for Small Business Owners with Disabilities (MetLife)
- Multicultural Lab (M&T Bank)

Role of NDI Board

- Introductions to companies and organizations that are part of the small business ecosystem
- Refer entrepreneurs and small business owners with disabilities to the CNPP in the DMV area
- Identify potential funders/sponsors for the National Virtual Small Business Convening
- Help publicize success stories that will be developed from these multiple projects

Additional Questions Contact

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Michael Morris

Senior Strategic Advisor

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NDI Board of Directors Meeting Public Policy Update

Michael Morris

Senior Strategic Advisor

National Disability Institute

June 23-24, 2022

Approach

- NDI Public Policy Team (monthly meetings)
- [Consortium for Constituents with Disabilities](#)
- [Collaboration to Promote Self-Determination](#)
- [Funding Our Future](#)
- Dartmouth Public Policy Fellow (summer)
- Citibank Public Policy Fellows (intersectional lens)

Approach

- Testify before Congress
- Meet with federal agency representatives
- Submit comments on proposed regulations
- Meet with Congressional staff
- Sign on Consortium letters
- Disseminate and translate knowledge from NDI research
- Participate in collective action (federal and state) with other groups

Focus of Public Policy Development

Legislation (general and disability-specific)(g)(d-s)

- ABLE-Age Adjustment Act ([S.331/H.R.1219](#)) (d-s)
- SSI Savings Penalty Elimination Act (S.4102) (d-s)
- Equal Credit Act of 2022 ([H.R.____](#))
- Private Loan Disability Discharge Act of 2021 (H.R.2498) (d-s)
- Assistive Technology Act and Alternative Financing Programs (AFP) (d-s)

Regulatory Changes

- [CRA Modernization](#)
- [8a Small Business Contracting Preferences](#)
- [Waters and Brown Urge SEC Chair Gensler to Require Data Reporting to Improve Future Rulemakings on Human Capital and Diversity Disclosure](#)

Implementation of Laws and Interaction with Federal Agencies

- Workforce Innovation Opportunity Act (WIOA) (ODEP)
- Community Reinvestment Act (CRA) (FDIC, OCC, FRB)
- Achieving A Better Life Experience (ABLE) Act (IRS, SSA, NCD, FDIC, MSRB)
- Social Security Programs (SSA)
- Equity Executive Order ([EO 13985](#)) (Office of Domestic Policy) Advancing Racial Equity and Support for Underserved Communities Through the Federal Government
- COVID Relief Bills: CARES Act and American Rescue Plan

Hot Button Issues

- Advancing Racial Equity and Support for Underserved Communities Through the Federal Government ([EO 13985](#))
- CRA Modernization
- ABLE Act Education and Outreach
- Tax Code Reforms (EITC and Child Tax Credit)
- COVID Economic Relief Implementation
- Social Security Reforms
- Disability Data Collection and Analysis

Sign-On Letters

- [CCD Financial Security and Poverty and SSA Taskforce Secure 2.0 Letter](#) - (May 23, 2022) The Consortium for Constituents with Disabilities (CCD) Financial Security and Poverty Task Force and Social Security Taskforce urge you to include the ABLÉ Age Adjustment Act (S. 331/H.R. 1219) and the SSI Savings Penalty Elimination Act (S. 4102) in the final SECURE 2.0 legislation.
- [Student Loan Payment Pause Letter](#) - (March 14, 2022) The Consortium for Citizens with Disabilities (CCD) Financial Security and Poverty Task Force write to urge you to extend the federal student loan payment pause and not require borrowers to resume payments in May. CCD's mission is to engage in concerted advocacy for national public policy that ensures the self-determination, independence, empowerment, integration and inclusion of children and adults with disabilities in all aspects of society free from racism, ableism, sexism, and xenophobia, as well as LGBTQ+ based discrimination and religious intolerance; that enhances the civil rights and quality of life of all people with disabilities and their families; and that reflects the values of the Americans with Disabilities Act and all civil rights law.
- [CCD Letter ABLÉ Public Education Campaign Letter](#) - (March 14, 2022) On behalf of members of the Consortium for Citizens with Disabilities (CCD) Financial Security and Poverty Task Force, we urge you to work together to design and implement a public education campaign to increase awareness, understanding and enrollment in the Achieving a Better Life Experience (ABLE) Act program. There are over eight million eligible children and adults with disabilities nationwide who could benefit from opening and growing individual ABLÉ accounts with their preferred choice of state ABLÉ programs.

Next Generation Issues to Consider

- New approaches to wealth creation
 - Child Savings Accounts
 - Universal Basic Income
 - ABLE seeding and matching programs
- Equity and intersectionality
 - Impact of multiple identities compounding historical patterns of bias and discrimination
 - Lowest levels of labor participation and asset accumulation
 - Impact on policy development, data collection and analysis
- Extra costs of living with a disability
 - Impact on means-tested public benefits
 - Need for more research to understand differences across age, type of disability and other variables

Role of NDI Board

- Identify emerging policy issues
- Bring new relationships with employers, other groups, policymakers to support policy development
- Identify program implementation challenges for problem solving at a federal level including possible regulatory or legislative changes
- Identify program innovations at local and/or state levels for consideration of adoption at federal level in program funding and policy change

Additional Questions Contact

Tom Foley

Executive Director

tfoley@ndi-inc.org

Michael Morris

Senior Strategic Advisor

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**Recap of Day 1, Preview &
Expectations for Day 2, Including
Board Member
Feedback/Suggestions, & Adjourn
(Mike): 4:30pm-4:45pm**

Agenda at a Glance: Day 2

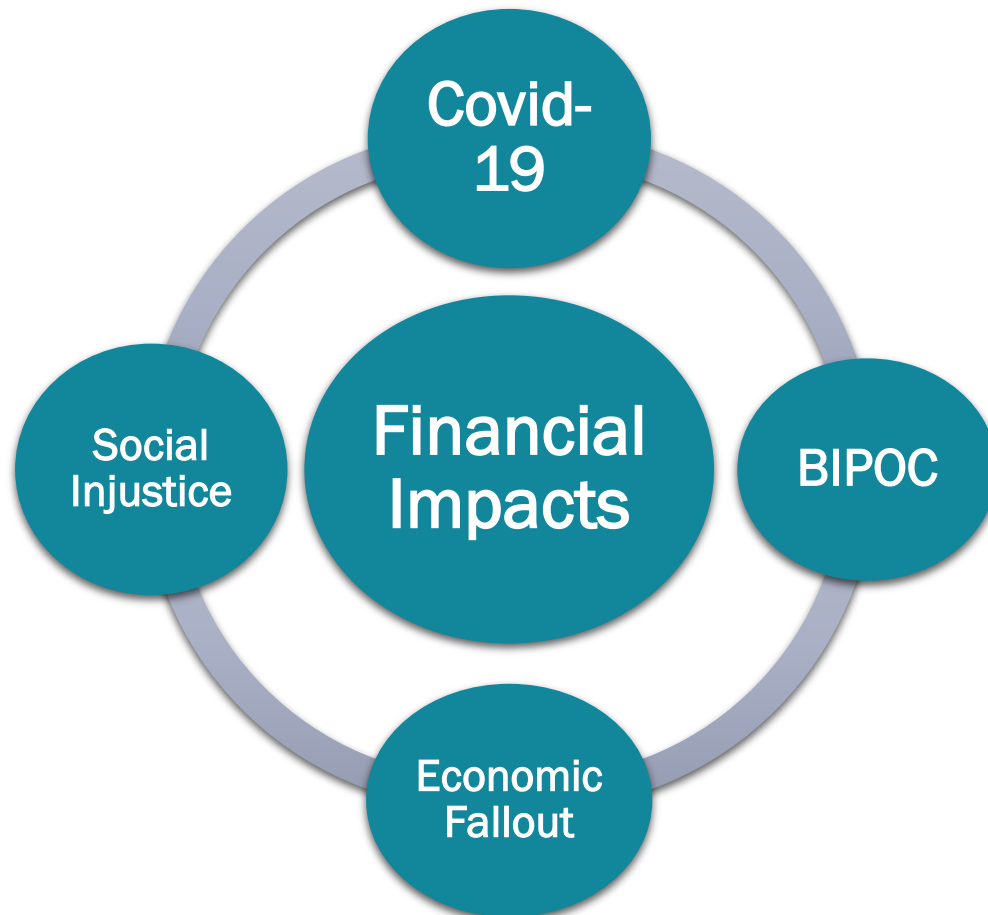
- Welcome, formally open meeting, and give overview of Day 2 (Mike): 10:00am – 10:15am
- Diversity, Equity, and Inclusion Update (Tom & Shajira): 10:15am – 10:45am
- Break: 10:45am – 11:00am
- Talent Discussion: 11:00am – 12:00pm
 - Sourcing, recruiting and retention, benefits for new and existing staff members (e.g., WFH, salary)
- Break: 12:00pm – 1:00pm
- NDI Priorities for 2nd half of year (Elizabeth J. & Tom): 1:00pm – 2:00pm
- Next steps- dialogue/brainstorm (Tom and Mike facilitate): 2:00pm – 3:15pm
 - Discussion on current topics and issues for the disability community, how NDI might be engaged in solutions (keeping within NDI's mission and core values), and how board members can actively support NDI's work
- Meeting recap/discussion and formal adjourn (Mike facilitates): 3:15pm – 3:30pm

Welcome, Opening, & Overview of Day 2 (Mike): 10:00am-10:15am

NDI's Diversity, Equity, Inclusion and Accessibility Initiative

Shajira Brown
Director, Equity and Inclusion

The Moment of Today



NDI Four DEIA Pillars

1. Building internal capacity around DEIA through:
 - Education and training and
 - Reviewing and updating policy and procedures
2. Ensuring diversity and inclusion of the BIPOC community across all projects and work
3. Increasing partnerships with organizations that support Hispanic/Latino, Black, Asian and Native American communities (racial equity groups)
4. Ensuring the field has competency on inclusive practices at the intersection of race, disability, financial inclusion and poverty.

1. Building Internal Capacity

To ensure that the work of NDI advocates for and reaches **ALL** people with disabilities, ensuring a focus on the variety of identities that makes up this community.

Our review shows more work is needed on:

- Increasing BIPOC representation in our research
- Understanding of DEIA among staff
- Building knowledge and understanding of Intersectionality among partner organizations
- Improving circulation of our tools and resources within BIPOC communities

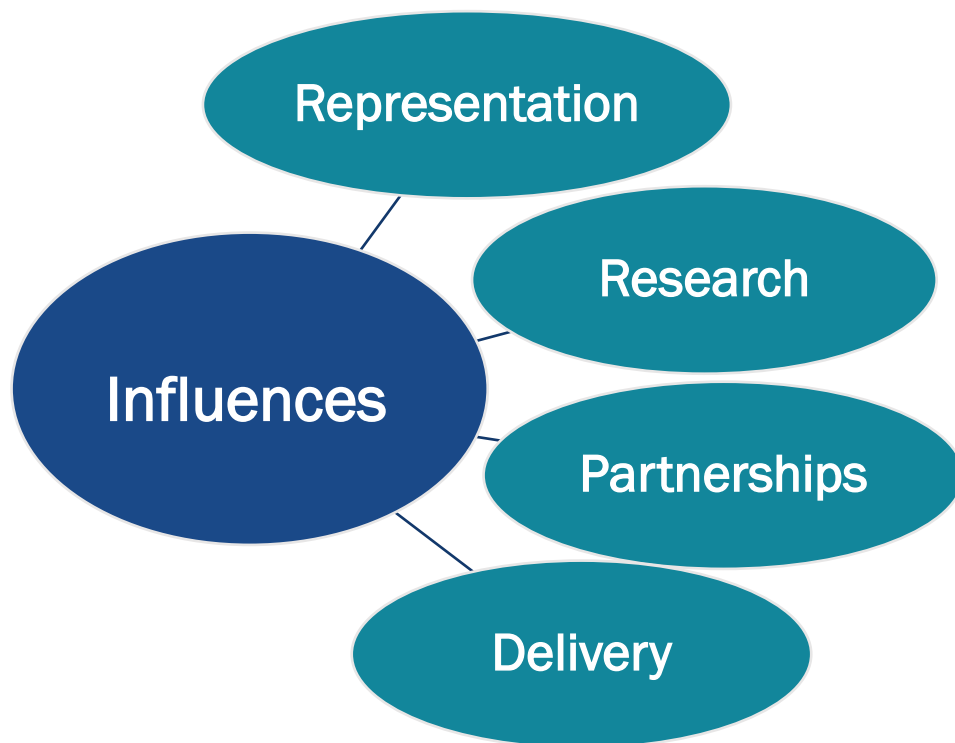
Why Building Internal Capacity Is Important

Activity Instructions

1. Take two minutes and come up with at least 6 words that describes who you are.
2. Put a line through every other word



Building Internal Capacity – Influences and Approach



Approach

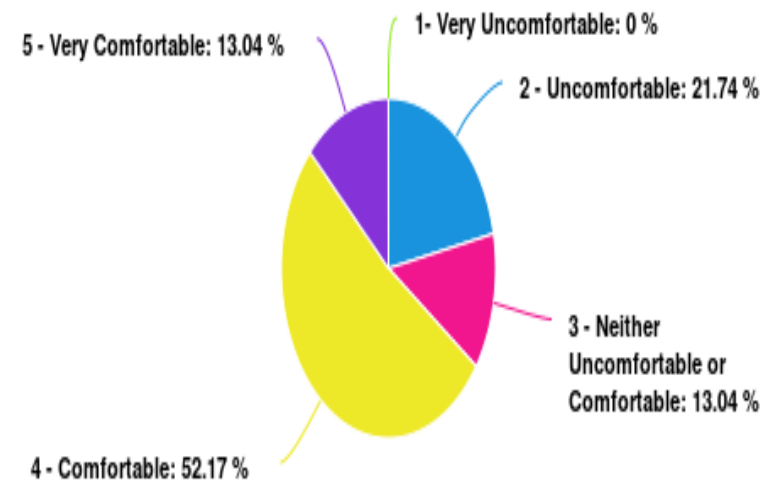
- Simultaneous learning and implementation
- Shared responsibility: Staff implements and speaks to DEIA in their projects

Building Internal Capacity – Accomplishments

Staff Enrichment

- Collected staff demographics
- Surveyed staff on DEIA attitudes and needs
- Implemented Equity & Inclusion Enrichment Branding
- Developed a staff training plan

How comfortable are you addressing challenging remarks or moments that arise when discussing racial inequalities?



Staff Training Plan

- 1. Updated Racial Equity Terms/Inclusive Language**
- 2. Implicit Bias**
- 3. What Is DEIA? Applying DEIA To Your Work**
4. Challenges Of Intersectionality And How To Combat Them
5. History Of Systemic Bias And Cultural Competency
6. LGBTQIA+ Specific Training (Disability Focus)
7. Micro Messages/Microaggressions/Microinequities
8. Talking About DEIA Topics In Various Environments (Difficult Conversations)
9. Valuing Differences And Allyship.
10. Addressing Exclusionary Behavior And Language
11. Conducting Research On Racial Equity Groups
12. Empathy In The Workplace/Empathetic Leadership
13. Psychological Safety (Harvard)

Building Internal Capacity – Accomplishments



Policy / Practice

- Updated NDI terminology:
 - DEIA
 - LGBTQIA+
- Suggested use of Pronouns
- Updated Job Descriptions for Inclusion
- Updated imaging for DEIA in collaboration with Comms

2. Diversity & Inclusion in NDI Projects

Accomplishments

- DEIA is written into all project proposals
- Increased number of BIPOC staff from 4 to 7
- Staff starting to share resources & tools with organizations within the BIPOC community
- Staff is sharing material around DEIA with one another at higher rates
 - Informational emails, training opportunities, webinars, etc.
- Staff is consulting the E&I team on the DEIA aspects for their work
- Staff requesting E&I team inclusion on planning and implementation for projects
- Demographic information being captured across project through surveys

3. Increase BIPOC Partnerships

Accomplishments

- Engaged with local Racial Justice Group for the Regional Roundtable
 - Detroit Chapter of the Urban League
- Connected with and sought counsel from The National LGBTQ Task Force
- Meeting with UMBC to test NDI material on BIPOC young adults
- Established relationships with several grassroots organizations after the national convening in December 2021:
 - The Cerebral Palsy Positive and Thinking Out Of The Box Consulting
- Developed a plan to drive connection and engagement with future BIPOC serving organizations

4. Training the Field

On the horizon:

1. Increase our reach to grassroots organizations and provide them with Technical Assistance.
2. Develop fee-for-service training material
3. Work with the Director of Research to document the efficacy of our work
4. Updating the Equity and inclusion website



Lessons Learned



As we continue on this path to Equity & Inclusion Enrichment, we've learned:

- Active and authentic executive leadership is crucial
- Topics regarding race and the LGBTQIA+ community make the staff most uncomfortable
- Presenting material on DEIA in a positive manner is necessary
- Providing supporting material with training is a best practice
- Allowing the staff to be apart of developing the training plan helped with buy-in.
- Reaching out to grassroots organization presents some challenges due to their capacity issues.

Break: 11:25am-11:40am

**Talent Discussion:
Sourcing, Recruiting & Retention,
Benefits for New & Existing Staff
Members (e.g., WFH, Salary):
11:40am-12:15pm**

Staffing

- Increase flexibility (continuing work from home)
- Increase in staffing
- HR Consulting Company
- Streamline Interaction with iSolve System
- Other thoughts and consideration?

Break: 12:30pm-1:15pm

**NDI Priorities for 2nd Half of Year
(Elizabeth J. & Tom):
1:15pm-2:15pm**

NDI Projects - Capacity Building

#	Project	Funder
1.	Capacity Building	Citi Foundation
2.	Neighborhood Builders (Equity Work)	Bank of America Foundation
3.	General Operation Support	Target Foundation

NDI Projects - Employment

#	Project	Funder
4.	ADEN	Self-Sustaining!
5.	Apprenticeship TA Center	SAFAL
6.	Integrated Employment Solutions	Multiple
7.	Integrated Resource Team Approach	Massachusetts Rehab Commission
8.	WINTAC QM	SDSU through RSA
9.	WIOA / LEAD Center	SPRA through ODEP
10.	Apprentice Project	Kessler Foundation

NDI Projects - Financial Empowerment

#	Project	Funder
11.	ABLE NRC	Prudential
12.	ABLE NAST Partnership	Wells Fargo
13.	AT Loan	Department of Education
14.	CalABLE Marketing Support	CalABLE
15.	CDICD	Multiple
16.	CFPB YMYG events	ICF
17.	Financial Equity Capacity Building: Detroit, Houston & Pittsburgh	JP Morgan Chase
18.	Financial Health Equity	Wells Fargo
19.	Financial Recovery Road Maps and TA	Bank of America
20.	Financial Resilience Center (FRC)	Bank of America
21.	FRC Credit Activities	Experian
22.	Financial Wellness for Persons with Developmental Disabilities	Illinois DDC
23.	Growing the Financial Health of Black & Latinx	MetLife Foundation
24.	Older Adults Financial Stability	CFPB
25.	Game of Life, Disability Financial Inclusion	Objective ED

NDI Projects - Research

#	Project	Funder
26.	ABLE DRRP	NIDILRR
27.	Disability-Inclusive Employment Policy Center	Syracuse University
28.	Disability Justice briefs	Asset Funders Network
29.	Persons with mental health disabilities: financial behaviors and barriers to financial inclusion	Pending
30.	Potential economic impact of autonomous vehicles for people with disabilities	AV Company
31.	Disability Data Analysis	Pending with Financial Health Network

NDI Projects - Small Business

#	Project	Funder
32.	CDFI Small Business TA	Wells Fargo
33.	Community Navigator Pilot Program	Small Business Administration
34.	Disability Marketplace Feasibility Study	Wells Fargo
35.	Growing the Financial Health of Black and Latinx Families and Business Owners with Disabilities	MetLife Foundation
36.	National Convening on Small Business	Wells Fargo

NDI Priorities Continued

- Environmental Social Governance (ESG)
- Overview (Dan)
- Opportunities (AVs Project)
- Social Innovation Summit 2022
- Blackrock, Kauffman, Skoll

Next Steps: Dialogue/Brainstorm (Tom & Mike facilitate): 2:40pm-3:15pm

- Discussion on current topics and issues for the disability community
- How NDI might be engaged in solutions (keeping within NDI's mission and core values)
- How board members can actively support NDI's work

**Meeting Recap/Discussion &
Formal Adjourn (Mike facilitates):
3:15pm-3:30pm**