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High-Performance Inclusion System™



Whitepaper Confidential Document



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High-Performance Inclusion System™

Program Overview

Business Case Summary

In order to remain competitive in the global marketplace, it is crucial for businesses to implement high-performance practices that optimize the sharing of information and empower talent development pipelines. Equally challenging is attracting and retaining highly motivated and performance driven talent. This training is a valuable resource as it includes vital information on a key, sometimes-overlooked demographic in the workforce: the Hispanic Millennial and Gen Z talent.

Our **High-Performance Inclusion System** is a customized diversity learning program that is designed to address your Latino generational issues. Through an extensive assessment including interviews of your leadership team, we will define your company's needs and work closely with your leadership to develop "high-performance inclusion practices" that align with your company culture and meet your specific market and business objectives.

Audience Profile

High-Performance Inclusion System is designed for team leaders and/or managers. Attendee groups can be intact or open enrollment.

Delivery Format

High-Performance Inclusion System training is available in on-site, virtual video e-learning and blended learning formats. On-site training is conducted over two days, with each session lasting from 8:30 a.m. to 4:30 p.m. Virtual video format is delivered via live webinar kick-off and 12 live webinar sessions (45 -60 minutes). Live webinar labs ensure skills integration by engaging in real-time work challenges and relevant Q & A interaction between attendees and Dr. Sanchez. Blended learning format is a combination of on-site and virtual delivery. The **High-Performance Inclusion** curriculum is composed of content delivery, group interaction, business-specific Q&A sessions, and best practices sharing.

Learning Objectives

Objectives for **High-Performance Inclusion System** training:

- Evaluate personal biases and maximize understanding of self and others.
- Clarify business priorities and company culture.
- Create an environment of learning and idea sharing.
- Gain knowledge and expertise regarding the Hispanic/Latino workforce.
- Compare and contrast similarities and differences between Hispanic/Latino Millennials and non-Hispanic Gen Yers and Gen Zers.
- Collaborate with fellow leaders/managers to facilitate teamwork and cooperation with the Latino Millennials and Gen Z's.
- Increase levels of satisfaction among participants by improving communication skills with the Hispanic Millennials and Gen Z's.
- Encourage leaders/managers to anticipate the challenges of a diverse 21st century multigenerational workplace.

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Designing Partnering

Design Partnering Overview

Training programs can only succeed when the training topic is relevant to the business objectives. Our training programs have been designed to be delivered in various settings. Prior to the training delivery, we will work with your in-house experts to customize a program that specifically meets your intended outcomes.

Mutual Trust & Respect

We are interested in collaborating with your Human Resources Leaders to promote and invest in a long lasting partnership based on mutual trust and respect. To ensure a successful training implementation, we seek to understand your business challenges, training objectives, and desired outcomes.

Understand Client Needs

Understanding your talent and culture priorities is critical to the success of a training program implementation. We work diligently to meet your specific business needs, training expectations and outcomes.

Materials Overview

Once the delivery format has been selected, confirmed and scheduled, the training materials will be available to the client.



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Curriculum Content

Content Overview

The course curriculum focuses on bias self-awareness, learning, idea generation and action planning. Attendees will be offered a highly relevant and safe learning environment through course content and Q & A discussing current work challenges with the Hispanic workforce.

Organized module delivery is combined with participant group discussion regarding key business challenges. The High-Performance Inclusion System curriculum is carried out in three phases.

Phase 1: The Strategic Context—Business Needs and Desired Outcomes

Prior to making specific business recommendations, our first goal is to gain a strong understanding of your corporate culture and your specific needs and priorities. In Phase 1: The Strategic Context, we identify the strategic environment, formulate a detailed description of the business need, and determine the scope of the project to ensure the best course of action for your business.

- Establish Strategic Environment
 - Organizational Overview
 - Business Need
 - Drivers for Change
 - Business Outcomes
- Formulate Detailed Description of the Business Needs
 - Problem/Opportunity Statement
 - Prioritized Requirements (High Level)
 - Assumption
 - Constraints
 - Dependencies
- Setting the Scope
 - Boundaries
 - Stakeholder Analysis

Phase 2: The Analysis and Recommendation

In Phase 2: The Analysis and Recommendation, we take the essential information we gathered in Phase 1 and prescribed options specific to your business goals and needs. We will evaluate these options with your business, screening and covering advantages and disadvantages to permit you to make informed decisions based on your desired outcomes.

- Establish Evaluation Criteria
 - Describing Options
 - Screening the Options
 - Advantages and Disadvantages
- Strategic Alignment
 - Alignment with Desired Business Outcomes
 - Cost Benefit Analysis/ROI
 - Recommendations

Phase 3: The Management and Capacity—Managing the Investment

In Phase 3: The Management and Capacity, we establish a set of strategies that best fit your business's goals and work to ensure that your desired outcomes are met. We work with you to build a sound risk management strategy that lays the groundwork for future progress and development.

- Develop Project Management Strategy
 - Schedule and Approach
 - Implementation Plan and Key Performance Indicators
 - Change Management Strategy
 - Performance Management Strategy
- Determine Risk Management Strategy
 - Risk Summary
 - Risk Management Approach



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Delivery Formats

- | | |
|--------------------------------|--|
| On-Site Format | High-Performance Inclusion System is carried out in three phases, beginning with a series of extensive interviews. |
| Virtual Video Format | <p>Virtual video e-learning format is delivered in live scheduled sessions. The sessions are scheduled over ten weeks, once a week, with each session lasting 45-60 minutes.</p> <p>Live sessions ensure skills integration, engaging participation, and sharing business challenges as well as best practices. The virtual video format has a maximum of 24 participants.</p> |
| Blended Learning Format | A blended learning format is a combination of on-site and virtual video delivery. This can be accomplished based on the clients' schedules and learning objectives. |



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Quality Assurance

Ensuring Quality

Sanchez & Associates is dedicated to learning and providing the most comprehensive program and services available. Our driving force is the intense desire to perform at the highest standards. We are committed to inclusion that promotes learning, recognition of similarities and differences, personal growth and the contribution of others. We measure the results of our program by evaluations and client results.

Monitor Evaluations

After each program, we review participant evaluations, debrief with clients, summarize results and identify future opportunities for effectiveness.

Feedback

We value all those we encounter and maintain a dedicated desire to build a strong professional bond of trust. Our facilitators and consultants will remain in contact with a sampling of participants after program delivery for a 2-month period. We will assess workplace challenges and best practices. This feedback allows Sanchez & Associates to improve continually our program as well as our curriculum content.



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Fees & Contracts

Cost Estimates	Sanchez & Associates program and consulting fees are competitive with other diversity consulting firms. We consider the scope of the project, geographic locations, number of profiles, and delivery complexity.
Cancellation Policy	We recognize that at times our clients must cancel a contract for various reasons. If scheduled programs or services are canceled between 10-21 calendar days before the contracted start date, we require our clients to pay 10% of the contracted fee. Cancellation that occurs fewer than ten calendar days prior to start date is subject to a fee of 25% of the total contracted fee. Any airline or hotel reservations that cannot be canceled or transferred will also be billed to the client organization regardless of the cancellation time.
Owner Rights	Sanchez & Associates has the sole property of all materials, principles, concepts, processes, skills and tools provided in our delivered programs. It is also agreed that our client may share our program and services content with members of their organization, but may not teach, produce, repackage, distribute or sell the delivered content to any person or entity inside or outside the organization without prior authorization from Sanchez & Associates, LLC.
Delivery Assurance	Sanchez & Associates, LLC agrees to fulfill all aspects of the final agreed upon contract. All programs, services, session, consulting services and materials will be delivered timely and by specified details of the contract. Sanchez & Associates can adjust the program and services to meet the client's needs.
Contract Protocols	We require our clients to supply us with an official purchase order number and invoicing information for our contract to be valid. If insurance is required to qualify as a certified vendor, we request that the insurance criteria be delivered to us as soon as possible to comply.
Payments	We will invoice for all our services rendered. We require payment for our services via bank wire within thirty (30) days of our invoice date. Payments received past thirty (30) days will accrue a monthly interest charge of 10% of the total bill until payment is received in full.



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About Sanchez & Associates, LLC

Company Statement

Sanchez & Associates, LLC is based in Hurst, Texas. Our firm is composed of a group of professionals who hold academic degrees in business management, organizational management, marketing and human resources. In addition, our team possesses real-life experience in diversity consulting in various fields.

Relevant Experience

Sanchez & Associates is led by Dr. Sanchez, SPHR, SHRM-SCP. She has over 35 years of experience leading diversity challenges at companies including Boeing, Delta Airlines, and American Airlines. Furthermore, she is a national speaker at conferences and business forums advocating for Hispanic/Latino talent. Dr. Sanchez has been named by *Hispanic Business Magazine* as one of the "Top 50 Hispanic Women in Business," "Top 80 Elite Hispanic Women," and "Top 100 Latinas in America." She was highlighted in a Hispanic Journal Magazine article recognizing her accomplishments in Human Resources and Diversity at American Airlines during and post 9/11.

Client Referral List

- City of Fort Worth, Texas
- Texas Christian University (TCU)
- EPSA USA Projects, Corp.
- Medica Health Management
- Umauma Experience
- YSoft
- Mothers Against Drunk Driving (MADD)
- NUCO Utilities
- Christian Cable Inc.
- RushCo Energy Specialists Inc.
- Fort Worth Business Assistance Center
- Ridecentric
- Tarrant County Community College (TCCD)
- American Leather Inc.
- Canales Furniture
- Chef Point Restaurant and Catering
- CCE, Inc.
- University of North Texas, Health Sciences (UNT)
- North Texas Community Health Centers (NTCHC)
- Texas Centers for Infectious Disease Associates (TCIDA)
- 5 Star Ford
- Cognate Bioservices
- Culligan
- In Defense of Animals
- Metro Animals Depot
- Spine Texas, LLC
- Ventex, Inc.



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- Walker Engineering, Inc.

Referral contacts from these companies are available upon request.

Contact Information

For more information, please contact Dr. Di Ann Sanchez, SPHR, SHRM -SCP President of Sanchez & Associates, LLC at (800) 254-8505, or diann@diannsanchez.com.

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Appendix A: High-Performance Inclusion System Process Map



