



FUNDAMENTAL
ADVISORY

Company Overview



About Fundamental Advisory

Fundamental Advisory was founded on a two-part mission: to create more equitable and accessible workplaces where people flourish and to drive business success through harnessing the power of a thriving, welcoming culture, and effective leadership at all levels. Our firm's focus is in three crucial areas: Culture, Leadership, and Strategy. We offer a range of expertise in these areas and have found great success in our proprietary approach.



Culture Leadership Strategy

We are experts in culture, leadership, and strategy and serve our clients with decades of experience in creating workplaces where people thrive. We are your strategic partner, guided with intentionality and knowledge, and dedicated to your organization's short- and long-term goals. Our intentional efforts in the areas of diversity, equity, and inclusion address the structural barriers that prevent access to success and provide meaningful tools to the organization and its leadership for sustainability.

We meet people where they are and offer tangible solutions and expert guidance for a lifetime of learning and growth. We are your partners in effectively establishing and supporting your equity initiatives and helping overcome pressing leadership and organizational challenges.

We know that diversity, equity, and inclusion is not simply the responsibility of those most affected by inequities, rather, that everyone within the organization must be involved in leading this charge. We believe that embedding equity and inclusion into the business processes themselves, DEI becomes a part of the organization's every aspect and employees will be free to reach their full potential and organizations will truly thrive. When innovation and creativity are flowing, the strength and sustainability of the organization are at their highest.

Awareness. Action. Accountability.

Through our framework of *Awareness, Action, and Accountability*, our clients are given the guidance and tools necessary to create an equitable and desirable workplace.



As your partners, we collaborate with your teams to develop processes and strategies that will become part of the culture of your organization. We have an intentionally cultivated range of expert consultants that bring decades of experience to our work.

Fundamental Advisory works with businesses, municipalities, law firms, and non-profits for a variety of Culture, Leadership, and Strategic planning and implementation efforts: from development and review of hiring and onboarding practices, to discussions of pay equity and forming affinity groups, to writing best practice guides and equitable processes, and drafting policies and procedures that embed DEI in the organization.

There is immense value in having a diverse workplace when it is combined with an inclusive work culture. The richness and depth that come from varied races, ethnicities, ages, genders, experiences, religions, and abilities, translates into becoming a sought-after employer. With new and varied backgrounds comes more knowledge, perspectives, and insights, thereby ensuring that your company will appeal to a broader market and client base while resulting in better recruitment and retention of talent. This provides a unique competitive advantage, contributing to long-term growth, stability, and success.

Training Overview

Fundamental Advisory develops and facilitates custom trainings and workshops in the areas of culture, bias in decision-making, cultural competency, anti-racism, inclusive leadership, cultural intelligence and awareness, foundations of DEI, racial and gender equity, sexual harassment, ethics, and power dynamics at work. All trainings/conversations are developed after an organizational assessment in order to create a custom, organization-specific program that creates lasting growth. These conversations open many doors to explore and create programs around.

Executive & Leadership Coaching Overview

Fundamental Advisory understands that the work of equity and inclusion and realizing a diverse organization takes time and intention. This is a marathon not a sprint and you need expert coaches to get you there. We develop leaders to manage from an equitable lens and with solid inclusive leadership strategies. To that end, we offer Equity Coaching that ensures leaders are equipped with the knowledge and skills to embed the principles of inclusion and equity within the organization. We utilize coaching strategies that are human-centered and individualized. We have a track record of coaching executives and leaders through culture challenges as well as for their own professional development. Coaching is a critical part of the overall work of DEI and must be done so in a consistent and thoughtful way.



Our Solutions-Driven Approach:

- Seek Understanding
- Identify Opportunities
- Build Awareness
- Set Goals and Strategic Plans
- Offer Trusted, Ongoing Support
- Accountability & Follow Through

We know that leaders face many challenges and often need trusted support to navigate their leadership hurdles as well as organizational hurdles. We support leaders by giving them the tools to thrive in their role and create cultures where innovation, respect, curiosity, and understanding are at the forefront. We offer confidential, candid spaces where leaders can come for guidance. We use an inquiry-based approach; we listen intentionally and offer expert support to leaders at all levels.

We have great success with our clients because we lean into relationships, trust-building, and awareness. We offer a variety of options to best fit your schedule. Most of the leaders we work with choose monthly or bi-weekly sessions to ensure consistent feedback and opportunities to discuss pressing issues. We offer a space for strategic conversations and action to be discussed.

Crisis Coaching & Sensitivity Coaching:

We also offer targeted coaching for leaders who find themselves in difficult situations and need more specific, time-bound coaching. For uniquely challenging scenarios or where workplace behavior is of major concern (harassment/discrimination, legal issues, board pressure), we offer organizations support in evaluating the situation and determining the best course of action and well as to coach the leader at issue on how they can change their behavior and foster trust again. Mindy Gulati's background as a lawyer provides an advantage for these situations as she brings her in-depth legal lens as well as her ability to handle matters with confidentiality, strategy, and candor. Many companies, corporate boards, and executive teams trust her with their most serious and consequential matters.

Fundamental Advisory Offerings

- Organizational Culture Assessment
- Listening Sessions/Focus Groups
- Strategic Planning and DEI Initiative Development
- Executive & Leadership Coaching
- Leadership & Business Strategy
- Custom Trainings & Microlearnings
- Monthly, Ongoing Consulting

Details:

Organizational Assessment

In order to effectively achieve sustainable organizational change and to become a more equitable and inclusive culture, you must first begin by assessing the current state of the workplace and its employees' readiness for change. Our team knows that a comprehensive understanding and assessment of your culture, policies, practices, and behaviors is a crucial first step. We will begin with interviews of key leaders and staff to understand the issues, goals, and objectives for this project. We will also likely conduct a policy review and may ask for relevant documents to assist in our analysis.



Facilitated Listening Sessions & Focus Groups:

Part of the organizational culture assessment and as an ongoing feature of our work, we conduct Listening Sessions or Focus Groups to provide an insightful way to understand the experience of your employees in this moment and how they have been impacted individually and as an employee. We provide people with a brave and open space and an opportunity to discuss the positive aspects and the challenges of their day-to-day experiences and how they experience the culture and leadership at your organization. This is a guided experience, and our experts will provide real time advice as well as be a listening ear.

Strategic and DEI Development:

Culture change and the work of DEI must be intentional, thoughtful that is backed by a solid, long-term plan. We ensure success and progress by creating custom strategic plans that incorporate your organizations vision and goals for organizational culture, that have benchmarks to assess progress, and are at the pace your organization desires. There is no one-size-fits-all in this work. We help identify and set expectations and then guide the work to meet specific goals and expectations.

Once we have assessed your organization, we create multi-year year strategic plan that will serve as the comprehensive guide. This will be a living document that can be adjusted and added to as needed. The ultimate goal is to embed DEI in the organization to ensure longevity and success.

Custom Training & Workshops

Each training is customized to the level in the organization and ensures management challenges are separately addressed and individual contributors have space to discuss their concerns and questions. These are conversational workshops that offer space to discuss and ask questions. Attendees will takeaway practical tools and conversation starters. This approach is a best practice for addressing how bias and inclusion affects decision making and for addressing company culture and collaboration.

We develop and implement a custom curriculum and training that meets your organization's specific needs and goals. Once the trainings are complete, we provide a debrief session with key leaders on insights, pain points, bright spots and strategic plans going forward.

Examples of workshops we provide:

- Bias in Decision Making
- DEI Foundations
- Racial Equity
- Gender Equity
- Allyship in Action
- Microaggressions/Subtle Acts of Exclusion- Impact over Intent
- Creating an Inclusive and Equitable Culture
- Leveraging Your Position, Power and Privilege
- How to Manage Conflict and Have Difficult Conversations
- Cultural Competency and Intelligence
- Inclusive Hiring & Onboarding
- Opening the Gate: From Gatekeeping to Gate Opening- Accessing More Opportunities for All
- Inclusive Leadership
- Leadership Fundamentals (key aspects are: how to set expectations, give feedback, hold people accountability, and have difficult conversations)
- Sexual Harassment & Discrimination Compliance Training
- Cross Cultural Relationship Building and Management



Microlearnings and Book Clubs:

In between workshops and trainings, we offer reoccurring microlearnings that add more opportunity for engagement and dialogue around DEI topics. These are custom-made for your organization and may include a short article or podcast with questions for reflection or they can be a 30-45 minute training at an all-hands meeting. We have found great success with our microlearnings to supplement the longer workshops and to align the organization on definitions, topical issues, and are a great way to further conversation.

Facilitated Book Clubs are a great way to continue dialogue and learning on topics around equity and inclusion. These often happen a couple times a year, are voluntary, and offer both team and competency building. Books are selected with your input and the book club conversations are informal and often a positive experience.

Hiring, Recruitment, and Promotion Strategy:

We know that critical to any work on culture, equity, diversity, and inclusion should include a thoughtful strategy around recruitment, hiring, onboarding, and promotion strategy. We work with many of our clients on creating that strategy and executing on the vision and goals. A strategy must be formulated using data, industry information, intentional discussions on bias and the efforts in both recruiting and hiring and longer term when promotions and assignments are given.

We also pay particular attention to ensuring that our client has the tools to develop an equitable lens in these processes. We know that inequitable barriers quite literally hide the best candidates from our view. We work with our clients to recognize these systemic barriers and have solutions to break down these barriers. We review the entire process, from the job description to the recruitment streams, to the interview questions and process. We do a bias and equity review of each stage of the process and offer guidance for each aspect. We routinely revise this process for our clients in a way that drives change and diversity in the organization. We offer inclusive onboarding processes and can customize these approaches to your organization and your needs. We also want to ensure you can do this work once we are gone so we equip leaders and your talent management team with the skills and core competencies they need to continue to address equity and bias in the hiring, recruiting and promotion process.

Virtual Diversity Officer/Monthly Consulting

Monthly Consulting will ensure that the lessons learned from the assessments, interviews, and workshops are embedded in the culture of your organization and that there is ongoing dialogue and strategic planning around Culture and DEI.

Fundamental Advisory has served over 75 organizations with both long term and short term as-needed consulting. We know that if done correctly, the work of equity and inclusion requires an agile approach that utilizes consulting along the way to ensure dialogue is consistent, policies and procedures are evaluated for effectiveness and with an equitable lens.

We are often called upon to offer strategic guidance to our clients and navigate changing realities in the workplace. We regularly are asked for urgent guidance and advice when uniquely challenging issues present themselves. We have been reliable a consultancy for over seven years to a vast array of clients across industries and are equipped with tested consulting solutions. We have a client-focused vision for our work that ensures we can meet your needs at every stage of your journey.

Not every organization can afford a full time Diversity, Equity, and Inclusion Leader, nor does everyone need one. In a consultative role, we ensure progress along your journey is much faster than on your own. Our regular presence signals your commitment and creates a viable space for conversations that might not otherwise take place.



Sample Schedule of a “10 Hour Month”

Four hours with the leadership team per month, focused on initiating and executing 1-2 projects at a time and evaluating what the needs are at the organization. As projects are implemented, priority lists are created and undertaken.

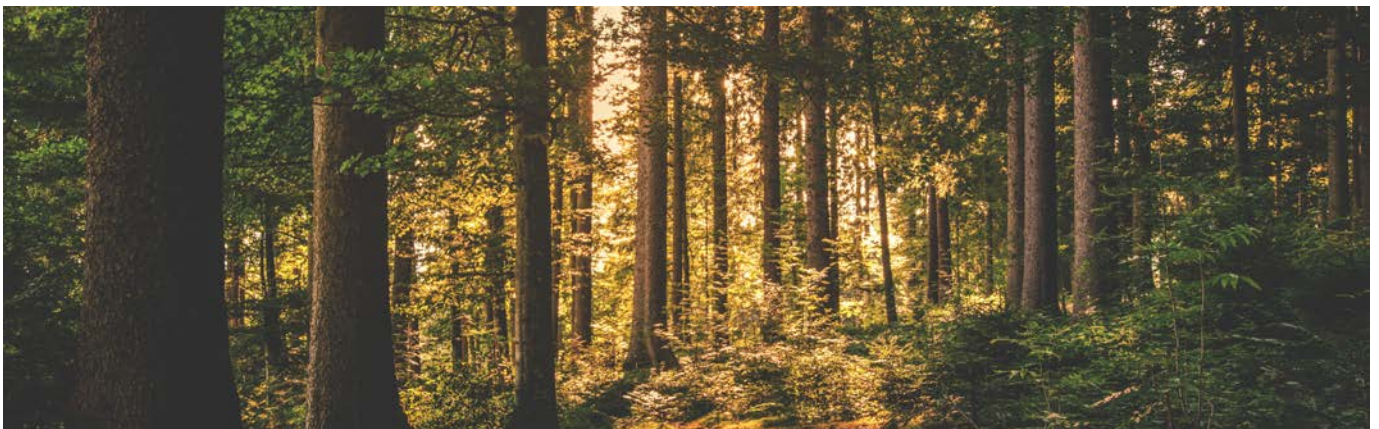
Three hours unclaimed available time for executives and leaders per month: executive equity coaching, emails, calls, questions, brainstorms, employee meetings and other facilitations.

Three hours for development and eventual implementation of organizational statements, strategic plans, processes and procedures, codes of conduct, amongst other items, to advance the goals of the organization.

Details: Leadership Team Consulting

With executives and leaders, we help define a project punch list and designate each in their proper order. Our role is to ensure your projects are well-conceived and that you are implementing best practices. We also lend expert, third-party credibility to decisions and results. Along the way we will seize upon opportunities to teach and train leaders. With the extra time we have reserved, we can initiate follow-up calls or meetings to do things like:

- Drill down into particular issues and priorities
- Work with an executive 1:1 on their systems, process, bias, and/or professional growth
- Consult on the organization and employees’ evolving needs, recommend actions.
- Attend or present at staff meeting or all-hands, brainstorms, strategy sessions, retreats.
- Strategize with you on measuring results and impact.
- In this capacity, we are effectively “on call” with some structure.



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