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Conscious Leadership, in fellowship with The L.I.F.E. Group (Legacy, Insurance, and Financial Education), is excited to present a dynamic racial and financial equity training program called *The Breakpoint Initiative*.

Established during a very trying year, in the throes of 2020, this unique program was built and formatted to boost company morale, increase employee engagement, and create a greater sense of community by exploring and analyzing our shared history, discussing economic realities, and incorporating components of critical awareness and implicit/explicit bias training. Our specialized areas of instruction are racial equity, social justice, and financial wellness.

Our mission is to enrich your organizational structure with a comprehensive curriculum that complements a healthy workplace culture. As you continue to shape, expand, and invest in your team, we are excited to help your process! We have presented our program in various businesses and non-profits, as well as in several churches through our Faith and Finances ministry, and we have consulted with both start-up and well-established companies.

The Breakpoint Initiative is committed to being a staple in the philanthropic community as well as a trusted diversity and inclusion partner in the business community. The importance of measurable success has been pivotal to our expansion and impact. Our bar is excellence, and we count on ongoing feedback from our clients to meet it. We consult with staff and leadership teams by offering a customized experience; we also employ multiple training options to ensure our services rise above and beyond the standards of successful implementation set forth by each organization we partner with.

We have seen our program enrich the perspectives of leaders, advance equity goals, and build bridges for employees to better engage with one another. When company culture is built upon a strong foundation of racial and financial equity, with conscious leadership at the helm, it is well-positioned to thrive. Empathy and empowerment are our ultimate goals!

Meet Our Team



Jamall Kinard

*Founder/President of Conscious Leadership and
Community Organizer/Non-profit advisor*

Jamall Kinard is the Executive Director of the Lakeview Neighborhood Alliance. After 10 years of service as an educator and coach in the Charlotte Mecklenburg School System, he began facilitating workshops with the nationally recognized diversity

training program, Racial Equity Institute, in August of 2019.

As a devoted community organizer, he spends the bulk of his time as the Executive Director of the Lakeview Neighborhood Alliance (LNA), where he is leading the charge on revitalization efforts by focusing on family stability and civic awareness.

The benefits of working with businesses and foundations are vast as Jamall builds a blueprint for various communities, organizations, and institutions to invest into the communities they thrive in. The goal of Conscious Leadership's work is to create environments where racial diversity is not only embraced but celebrated, strong local leaders are empowered, and systemic racism is dismantled.

Jamall obtained a Bachelor of Science Degree in Computer Science from Gardner-Webb University, Master's Degree in Leadership from Northeastern University, and has Nonprofit Business Management Certifications from both Wake Forest University and Duke University.



Thomas R-L Johnson-Bean

Founder and President of The L.I.F.E. Group

Author of “4 True Lies about Your Money”

Thomas Johnson-Bean is the Founder and President of The L.I.F.E. Group (Legacy, Insurance, and Financial Education) as well as an avid investor and 16-year entrepreneur. As a consultant, and author of [“4 True Lies about Your Money”](#), he is nationally recognized as an advocate for corporate health, employee engagement, and financial wellness.

Thomas spent 10 years as a Financial Advisor with Bankers Life and Casualty where he rose the ranks to become a Unit Supervisor and led the region in production. The Bankers Life model is based on Retirement income and Legacy planning. It was in building relationships with retired business owners, managing corporate exits, and succession planning where he found his passion for working with Business Owners and Executives to cement their vision and build healthy cultures where people can thrive.

With a track record of success, and great relationships within the Investment advisory industry, Thomas went on to become the Managing Director of a Millennial-focused Advisory firm in Uptown Charlotte. While growing a team of Advisors, he worked with budding Entrepreneurs and Start-up companies that used seed money, venture capital, and crowdfunding to expand. He has worked to grow healthy companies from the very beginning and helped successful companies close their doors.

Thomas has consulted with several Fortune 500 companies and enjoyed a flourishing career as a Financial Advisor before retiring his securities licenses. He is a graduate of Davidson College and a student of life.

Executive Summary

We customize a model of our programming specifically to meet the parameters of the racial equity initiatives sought by each organization we consult with. The focus will be to engage the established culture with an in-depth assessment of the senior leadership team and included staff, explore the data within the assessments, and evaluate the culture, through the lens of our expertise, and with those who work in the culture day by day. We then map out a plan to engage the culture with a breakpoint – this “Action phase” is built into our process.

By definition, a breakpoint is “A point in the processing of a program that the programmer wants to observe more closely by stopping the program and examining the contents of variables, buffers, and memory. After inspection, the programmer can step through the program one line at a time or cause the program to continue running either to the end, to the next breakpoint or until it crashes, whichever comes first.” In recent months, where financial hardships, social injustice, mental health, and racial inequity have all been at the forefront of our minds – embracing the idea of a Breakpoint is both timely and necessary.

Racial inequity, much like the wealth gap, is a problem that most people are aware of only in the abstract – *The Breakpoint Initiative* is designed to delve into the significance of this issue and act as a catalyst to shift the culture. The dynamics of race and income are prevalent in the workforce, and play crucial roles in an organization’s goals, whether they are openly discussed or not. While we are one community, there are fractures, and if left unexamined, they grow into the cracks that break apart organizations and render great visions obsolete.

Being sensitive to the underlying issues employees face outside of work, along with having a safe space to bridge the realities of a diverse working environment, are paramount to a healthy business culture. The racial wealth gap “starts with our nation’s history of institutionalized racism, discrimination, bias, and restriction from information and opportunity,” says Rodney Sampson, cofounder of Opportunity Hub (OHUB).

The employer that can speak to the various aspects of their employees’ opportunities in business, and in their personal lives, will excel. Addressing racial and financial inequity in the workplace can be effectively managed with the right information and investment. Corporate leaders may not be able to change the world, but they can certainly change their world. Organizations are relatively small, autonomous entities that afford leaders a high level of control over cultural norms and procedural rules, making them ideal places to develop policies and practices that promote racial equity. *The Breakpoint Initiative* offers a practical road map for making profound and sustainable progress toward that goal.

The Breakpoint Initiative is more important than ever to create a meaningful difference in addressing issues of racial equity within the workforce, which is a construct at the foundation for wealth creation and the principal vehicle of economic empowerment for every culture. Today’s workforce brings more people together from various backgrounds than at any time in history. A more diverse group requires a more in-depth process for sensitive issues like racism, gender roles, financial inequality, and sexual orientation.

Project Scope

The Breakpoint Initiative proposes a cultural development program. This Breakpoint will focus on systemic racism with an underlying theme of financial equity training, specifically to bridge the gap between the current socioeconomic climate and opportunities for community engagement. Our goal is for thoughtful reflection, along with tough conversations about our collective humanity, to take place alongside professional growth and increased self-awareness. When you build a culture that welcomes hard pauses to reflect on racial equity, financial growth, and social issues - the organization grows the right way.

Awareness (What is the Culture?)

Too often organizations want a quick fix to building a healthy culture and minimizing toxicity. This is likened to trying to cure a patient by writing a prescription without first understanding the patient's underlying health condition. However, long-term wellness requires more than just a magic pill. Organizations, and societies alike, must resist the impulse to seek immediate relief for the symptoms, and instead focus on the disease. Otherwise, they run the risk of a recurring ailment.

Effective training involves many levels – the most important of which is bringing awareness to the entire organization that there already is an established culture and exploring the impact of that culture. While most institutions already have mottos, mission statements, and codes of conduct, it does not mean they are rooted in the psyche of their staff or healthy for the achievement of meaningful goals. Our mission is to discuss the culture as it stands and why there is a desire for a racial equity initiative to improve upon it.

Information Gathering (Leadership and Staff Assessment)

A necessary step is a thorough assessment of your organization/leadership network. While we have a broad understanding of the network we would work with, we need to assess the individual members who will participate in the training. This plays an important role in the broader community; it is important to build awareness about the culture within its own community. It is equally important to realize that people govern their own culture. Each of those we engage in dialogue has their own belief system about racism and what it looks like. We must learn who we are engaging and what the impact of their leadership/teamwork style is on the rest of the organization. We would like to begin with formation/assessment of a Racial Equity Committee then expand from there.

Nothing can change within a culture if employees, as well as leaders, are not fully engaged in the journey. Sitting in an auditorium and watching a PowerPoint presentation will not cut it. Truth is exposed in intimate settings. People appreciate the truth because it means you respect their intelligence. When we assess the committee, we can either do so in a group environment or offer one-on-ones with the leadership team.

We seek open and honest feedback – which should also be the desire of each participant in the training. When staff feel that they are victims of any kind of discrimination without proper outlets to share this feedback with us, then diversity initiatives will be perceived as the problem, not the solution. This is one of the reasons such initiatives are frequently met with resentment and resistance. Beliefs, not reality, are what determine how leaders/employees respond to efforts taken to increase equity.

Analysis (Examine the Foundation)

If systemic racism is not fully understood as a potential reason for an unhealthy culture, then the mindsets and sentiments of people within the organization may reflect bias without their awareness. Many things that make a company great require significant sacrifices. Your culture should tell both sides of the story – sacrifices being made for career growth and the sacrifices your organization is willing to make to educate rigid and inflexible mindsets.

While leadership support is essential to maintaining worker happiness, ignoring systemic racism in policies and procedures can be a sign of a toxic environment. Analyzing ideals disruptive to the cohesiveness of the team is necessary for leaders to encourage a supportive culture. In an unhealthy culture it is more comfortable for systemic racism to go unaddressed because those who benefit are not willing to forego their advantages.

Advantage arises out of the ability to force the organization to adapt to those with privilege instead of being willing to adapt themselves to benefit the culture. By asking them to take initiative to grow outside of their comfort zone and make positive changes, your organization is not only invested in the progress of the individual, but the company as a whole. Our analysis provides the leadership team with real-time strategies to bring outsiders into the new culture and ensure insiders are mentally bought into the overall health of the network.

Plan for future opportunities (Foundation of Empathy)

Now is a time when business leaders need to show that they care about people – not revenue growth, not client acquisition, and not enforcing traditions in the face of severe health conditions in our society. Your business model may already have established initiatives which reflect the buy-in of the leadership, network, and the employees – our job will be to ensure the buy-in of the larger group outside of those who already understand the need for this important step. Culture is often a reflection of the level of team belief that their leadership cares about them.

How do you create a foundation of trust so that people feel okay being open and giving feedback to peers and the leadership team? How do you enrich your culture with the intention of using the input from your employees in a thoughtful way? Empathy is the answer.

Culture is organic - it cannot be dictated by one person. In the process of delivering our curriculum, the culture of the organization will naturally begin to shift as the group buys in. A successful foundation has its origins in the already established culture. Racial equity is not meant to overhaul the culture but to help steer it toward better health. It should be a completely organic process – which is a far cry from many corporate environments, in which a single person or committee is responsible for dictating the culture. Remember: healthy culture may be encouraged from the top-down, but it will only take root from the bottom-up.

Action (Build a Culture of Empowerment)

One of the ways that smart business leaders can encourage a healthy culture is by actively putting the power to shape the culture in the hands of those who work in it. In other words, the shift will not be a mandate. It will be because a strong foundation has been laid to ensure empathy is rooted in all staff interactions, onboarding procedures, and is considered when implementing policies. Invitation to be a part of this process will work better than a mandate. When an organization is fully aligned, when everyone feels empowered to have healthy conversations around professional growth, career development, and feel their beliefs are respected – it breeds a desire to join these trainings, which in turn breeds success.

It is important that every workplace articulate its unique features and create themes, both internally and externally, that can be narrowed down and shared with all employees. But when the hierarchy initiates programs without involving those who it will govern then it will be subject to a culture better defined by what it wants to be than what it really is. We look forward to seeing how the staff reacts to the idea of attending racial and financial equity training rather than the necessity of it. We also look forward to building a “skin in the game” atmosphere throughout the staff as we discuss the actions to take to build a healthy culture.

Reflection/Evaluation (Breakpoint)

The Breakpoint Initiative operates as a hard pause in the culture building process to take inventory of the strength of what is being built. We have strategies unique to our platform, drawn from our years of experience in diversity and inclusion training and financial education, which are designed to test the foundation of the organization. When these strategies are used, they allow us to openly discuss how people feel about the company and the direction it is headed in as well as their own hurdles. The responses will identify whether empathy and impact are the foundation of the organization or if profit, productivity, and/or power are in the cement.

Many organizations have a core mission to serve the community and push forward healthy initiatives, so these strategies are even more important. By embracing the humanity of the organization/network, identifying the long-term goals but having an intimate understanding of the goals of the people within it as well, we find our building blocks.

The Breakpoint Initiative



Orange County Partnership to End Homelessness Virtual Training Racial and Financial Equity Program



Introducing a 6-month in-depth training on Racial and Financial Equity

Organizations that Benefit Most

- Teams seeking cohesion in the workforce
- Organizational development
- Racial Equity Team (Work group) Model
- Up to 20 Participants

- ✓ Cultural Awareness Review
- ✓ Racial Equity Team Assessments
- ✓ 2 Leadership Breakouts
- ✓ 6 Full Group Sessions
- ✓ Program Implementation
- ✓ Strategy Review

8 in-depth Virtual trainings

- 120-Day Training Calendar
- Each training accompanied by pre-work and homework
- Individual assessments with each member of Racial Equity Team
- Virtual Training Slides included in follow-up emails and synopsis of each training
- Discussions facilitated around specific categories of Racial and Financial Equity data
- Post-training review session with Racial Equity Team

6-Month Program Fee

\$11,750
Upfront
or 2 Equal
Payments
of \$6,000

12-Month Program Fee

\$20,750
Upfront
or 2 Equal
Payments
of \$10,750

- *16 Total trainings
- *4 Leadership Workshops
- *12 Full Group Sessions
- *Racial Equity Workbook
- *Organizational Assessment
- *Paperback copies of 4 True Lies about Your Money
- *Financial Equity Coaching

Professional References

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www.SERVE.org

Program Title: Diversity and Financial Equity Training Program

Timeframe: February 2021 – May 2021

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Program Title: Diversity and Financial Equity Training Program

Timeframe: February 2021 – May 2021

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Program Title: Diversity and Financial Equity Training Program

Timeframe: February 2021 – May 2021

Professional References

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Project Title: *A Tree, Bee, and Bike Friendly Community*

Scope: Cultural Development Through a Racial Equity Lens with OCPEH - Orange County Partnership to End Homelessness

Timeframe: October 2020 – Present

Reverend Dennis Williams

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Project Title: Racial Equity Consulting with Faith Memorial Community Outreach Center

Scope: Critical Awareness and Community Engagement

Timeframe: October 2019 - Present

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give.classy.org/Lakeview

Project Title: Engage, Educate, Empower

Scope: Diversity & Financial Equity Program with the Lakeview Community

Timeframe: March 2019 - Aug 2019, Monthly sessions