
BUILDING AN INTENTIONAL & DEI-INFORMED STRATEGIC PLAN

A HOW-TO GUIDEBOOK FOR CENTERING EQUITY IN YOUR PLANNING PROCESS



About this Guidebook

The purpose of this guidebook is to support anyone involved (or simply interested) in strategic planning at their organization to holistically integrate DEI principles into their processes.

Within this guidebook, we present six characteristics of a DEI-informed Strategic Planning process and provide actionable tips, resources, and critical points of reflection to take forward. Throughout the guidebook, we offer activities that can help you get started with building your DEI-informed Strategic Plan.

TABLE OF CONTENTS

About this Guidebook	2	Part 2: Building Your DEI-Informed Strategic Plan	34
Table of Contents	3	Strategic Planning Process Timeline	35
Using a Shared Language	4	About the Process	37
Why DEI-Informed Strategic Planning is Important	5	PHASE 1: Kickoff	41
Part 1: The Six Characteristics of DEI-Informed Strategic Planning	6	PHASE 2: Current State	43
Six Characteristics Venn Diagram	7	PHASE 3: Vision & Strategic Priorities	45
CHARACTERISTIC 1: Co-Created & Representative	8	PHASE 4: Implementation & Project Planning	48
CHARACTERISTIC 2: Dynamic & Varied	12	PHASE 5: Publish & Communicate	50
CHARACTERISTIC 3: Iterative, Communicating Often & Closing the Loop	16	PHASE 6: Wrap-Up	52
CHARACTERISTIC 4: Including the Majority & the Margins	20	Getting Started	53
CHARACTERISTIC 5: Clear & Concise Language	26	The Big Picture	54
CHARACTERISTIC 6: Shared Ownership & Accountability	30	Connect with Us	55

Using a Shared Language

Language is powerful, always evolving, and has different nuances and interpretations across cultures. Language has been used to erase, define, uplift, or liberate individuals. It is helpful to keep in mind that people attach different meaning for words like “power”, “privilege”, “oppression”, or “racism”, depending on their different levels of knowledge, assumptions, emotions, and experiences.

Before moving forward, it is important to establish a shared language and make sure that everyone is starting from the same understanding. When we agree on terms, we enhance the effectiveness of our conversations. However, it is important for stewards of DEI to decide the extent to which a group must have consensus and where it is okay for people to disagree. As a prime example, “DEI” has been a buzzword of a term that is interpreted differently. It’s important for us to understand diversity, equity, and inclusion as separate concepts with nuance.

We’ve compiled a list of some key terms that you will come across throughout this guidebook with a description of how we will be defining them. Keep in mind that this isn’t an exhaustive list and that there are a variety of definitions that exist for these terms. However, these are some of the foundational concepts that we will be using. For further explanation of key DEI terms, you can utilize this resource: [“Fundamentals,” Racial Equity Tools](#).

DIVERSITY

Differences and variations found in a group that can encompass gender identity, race, ethnicity, age, class, ability, values, experiences, etc. What diversity is not: A proxy for race, ability, sexuality, or other characteristics.

EQUITY

Equally high outcomes of success for all individuals regardless of any social or cultural factors. Providing access, opportunities, and resources based on need. What equity is not: Equality, or treating everyone the same, with the goal of promoting a superficial feeling of “fairness”.

INCLUSION

Valuing and incorporating the perspectives, contributions, needs, and viewpoints of all people. What inclusion is not: An invitation for underrepresented or marginalized communities to be present in an existing space.

OPPRESSION

The systematic subjugation of one social group by a more powerful social group for the social, economic, and political benefit of the more powerful social group. Oppression = Power + Prejudice

MARGINALIZATION

A social process by which individuals or groups are (intentionally or unintentionally) distanced from access to power and resources and constructed as insignificant, peripheral, or less valuable/privileged to a community or “mainstream” society. This term describes a social process, so as not to imply a lack of agency.

SYSTEMIC OPPRESSION

Oppression is a system of advantage and disadvantage based on social group membership. Some groups are advantaged - seen as superior, have greater social power, and receive unearned benefits, while other groups are seen as disadvantaged - seen as inferior, has less social power, and face discrimination and violence.

“Systemic oppression” and “structural oppression” are almost synonymous. The difference is that structural oppression analysis pays more attention to the historical, cultural, and social psychological aspects of our current society (i.e. the racialization of society).

Sources: [Diane Goodman, Oppression and Privilege: Two Sides of the Same Coin](#), [Racial Equity Tools Glossary](#)

Why DEI-Informed Strategic Planning is Important

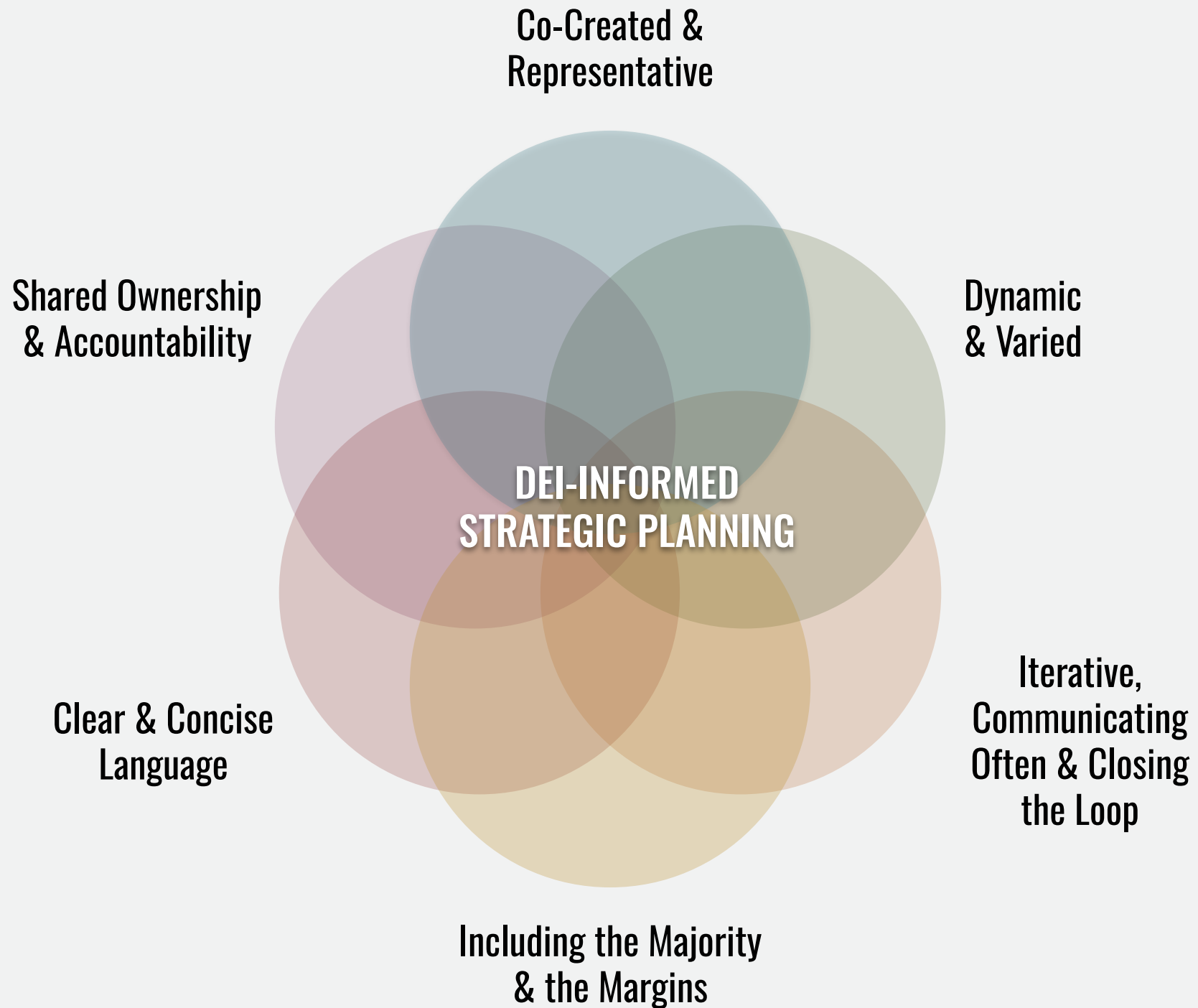
An organization's strategic plan is one of the most critical decision-making processes affecting an organization's success and growth. It holds a lot of power – setting the direction and tone for the entire organization.

Diversity, equity, and inclusion (DEI) shouldn't be separate from organizational operations but rather, deeply integrated into organizational workflows and decision-making. That also applies to an organization's approach to strategic planning, it should be holistic, intentional, and informed by diversity, equity, and inclusion principles. So forth, we can work to integrate DEI into organizational practices, policies, and long-term plans.

It is important to uncover disparities, remove bias, and bring people together to articulate a more inclusive and equitable vision for your organization moving forward. This begins with a collaborative, bottom-up process that considers the experience, perspective, and input of all employees and stakeholders, and gathers a baseline understanding of current inequities, opportunities, and shared vision.

Part 1:

THE SIX CHARACTERISTICS OF DEI-INFORMED STRATEGIC PLANNING



#1

CO-CREATED & REPRESENTATIVE

CO-CREATED & REPRESENTATIVE

Co-creating the vision and strategic priorities with a representative group of communities served and impacted stakeholders. Asking often, whose perspective is missing?

It is common for organizations to use a top-down approach for their strategic planning, especially in settings with more hierarchical organizational structures. In theory, the people responsible for the strategic plan are a group of representative, trusted leaders in the organization and are tasked with stewarding the sustainability and growth of the organization. However, this isn't always the case; too often, there is mistrust, lack of diversity, and little co-creation.

Taking a top-down approach lends itself to centering the perspectives of the people with the most power, and often, the furthest from the real work. In this approach, it can be easy to let bias drive decision-making. This lack of co-creation and representation does more harm than good; one reason being that organizations miss out on the opportunity to foster more trust as well as shared ownership, and accountability towards the vision and strategic plan. When leadership teams intentionally and genuinely seek out the perspectives of everyone across the organization, they'll get a more honest understanding of the current state.

Your strategic foundation is essential and there's no benefit in sugarcoating your current state. An honest picture of where your organization is at is the only way to identify and address the root causes of problems in your organization, instead of just the symptoms. Take the time to work together with your stakeholders to incorporate their input.

Characteristic #1

CO-CREATED & REPRESENTATIVE

REPRESENTATION

Representation is ensuring that stakeholder demographics and experiences are appropriately reflected in participation, leadership, decision-making, etc. The voices and perspectives of all stakeholders (staff, volunteers, communities served, customers, donors, board members, etc.) should be incorporated into strategic planning. Having relatable role models within a person's sphere of influence (for example, the workplace) is highly empowering. If you can see it, you can be it. And you can be more confident that the systems here are supporting equally high levels of success for all kinds of people with a variety of combinations of identity intersections.

CO-CREATION

Co-creation is when a group of people, ideally with diverse and representative perspectives (different demographics, cultural backgrounds, role levels, departments, geographies, etc.), come together at the ideation and iteration stages of a project to contribute to its creation and implementation. For this to be possible, the process must be fair, allowing each of the members to engage without barriers limiting their participation.

CO-CREATED & REPRESENTATIVE

Co-creating the vision and strategic priorities with a representative group of communities served and impacted stakeholders. Asking often, whose perspective is missing?

REMEMBER...



Design for representation:

Be intentional about who is involved in your process and how you can ensure a representative group of perspectives throughout the process. One way to do this is to consider the various intersections of identities, backgrounds, and experiences including (but not limited to) role level, ethnicity/race, gender, and age.



Design for inclusivity:

Designing for representation alone isn't enough; how you purposefully include those groups is also important. Ensure that your process is inclusive and accessible for the different groups you're working with by creating a variety of spaces for folks to engage in.



Check for barriers:

Avoid creating unnecessary barriers that may limit groups to participate in your process and provide you with their perspectives. Examples of barriers that may limit inclusivity include:

- Participants face insufficient time/money/mobility to engage in the process.
- Participants are unable to contribute their opinions on a topic due to a lack of sufficient baseline information.
- A lack of psychological safety in the group.

Characteristic #1

**CO-CREATED &
REPRESENTATIVE**

CO-CREATED & REPRESENTATIVE

Co-creating the vision and strategic priorities with a representative group of communities served and impacted stakeholders. Asking often, whose perspective is missing?

PONDER THIS...

*Whose perspective
is missing from
your current strategic
planning process?*

*What will you
do to include them
moving forward?*

Characteristic #1

CO-CREATED &
REPRESENTATIVE

EXTEND YOUR LEARNING

1. **TOOLKIT:** *The Co-Creation Toolkit and Interactive Guide* by USAID is a resource to learn more about how and when to use co-creation effectively.
2. **VIDEO:** “The urgency of intersectionality” is a TedTalk by Kimberlé Crenshaw, who coined the theory of intersectionality.
3. **RESOURCE:** *Intersectionality Resources* by Racial Equity Tools includes core concepts and fundamental terms related to intersectionality.

#2

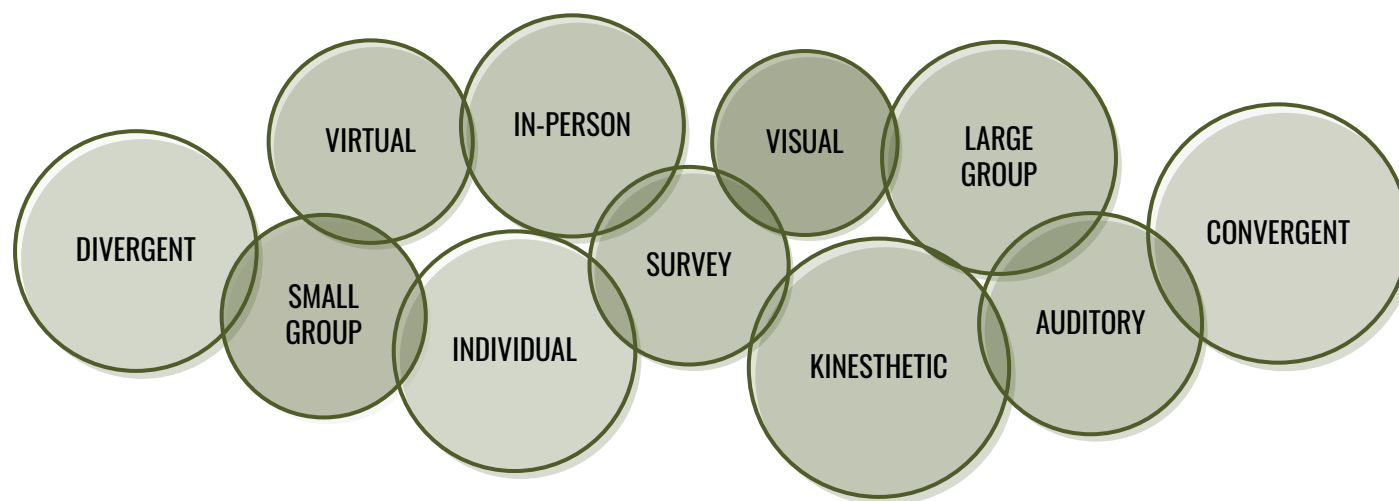
DYNAMIC & VARIED

DYNAMIC & VARIED

Having multiple ways for folks to engage in the process and provide input; creating and holding space for different thinking and learning styles, as well as space for difficult conversations.

It's not enough to have diverse and representative perspectives included in strategic planning processes, there must also be a proactive approach to allow every voice to be heard, even if they're not the loudest in the room. If we aren't careful, the type of spaces we prioritize may favor a majority group and exclude important perspectives from the conversation. Some people may feel less comfortable sharing their opinions than others due to a wide range of factors. For example, they may feel like they have less familiarity with the topic, a part of the process may not be as easily accessible, or they may feel like their opinion is not valued among other things. And even if people are comfortable sharing, they might require more time to reflect and analyze before they are ready to share.

This is why we must include dynamic and varied ways for people to participate in our processes. In doing so, we make space for people to feel safe and confident in sharing their honest opinions, feedback, and perspectives.



Each way of engaging can serve a different purpose to remove biases, increase inclusivity, and guide the process along. Individual reflection spaces before large group discussions can help encourage creativity and mitigate groupthink. Group discussions can be helpful for problem-solving by breaking down issues and exploring the viability of ideas. To obtain the most unbiased feedback, make sure to include spaces for anonymous input sharing (i.e. surveys).

Characteristic #2

**DYNAMIC
& VARIED**

DYNAMIC & VARIED

Having multiple ways for folks to engage in the process and provide input; creating and holding space for different thinking and learning styles, as well as space for difficult conversations.

REMEMBER...

Critically evaluate the variety of spaces within your process:

This can be done by identifying different formats and styles of spaces, reviewing your current process, and counting the number of spaces that meet each style. If you are lacking one style and you think you could benefit from more of these, consider adding to or adjusting your process.

Be mindful of people's time, pace, and bandwidth:

Some parts of the process may benefit from a divergent and convergent approach when you ask people to brainstorm and share ideas. It is recommended to start with spaces for individual reflection to encourage creativity with no bounds, and then move towards group discussions to expand on these ideas (think "yes, and"). Next, begin to converge to narrow in on the ideas to move forward with. At this point, you won't need the involvement of everyone, in fact it may hinder the process. Folks who are excited and have the capacity to work more on it can form a smaller task group to take things forward and continue to refine them. You can keep everyone else involved in the process in a much less time-consuming way by asking them for feedback during iteration.

Consider having an external facilitator lead these conversations:

Having an external facilitator host some of these conversations can allow everyone to participate. In addition, having a third party as the recipient of anonymous feedback can help with gathering honest input and unbiased data consolidation.

Characteristic #2

**DYNAMIC
& VARIED**

DYNAMIC & VARIED

Having multiple ways for folks to engage in the process and provide input; creating and holding space for different thinking and learning styles, as well as space for difficult conversations.

PONDER THIS...

With the way that your process is currently designed, does it favor one group over another?

Reference a wheel of intersectionality.

What is the level of commitment required for these spaces to be valuable and can participants commit to this given their bandwidth?

EXTEND YOUR LEARNING

1. **RESOURCE:** *Gamestorming offers a set of co-creation tools with diverse and varied formats to inspire things like vision and strategy creation.*
2. **RESOURCE:** *Inclusive Teaching Resources by The Harriet W. Sheridan Center for Teaching and Learning, includes definitions and communication strategies to support in more inclusive teaching.*

Characteristic #2

**DYNAMIC
& VARIED**

#3

ITERATIVE, COMMUNICATING OFTEN, & CLOSING THE LOOP

ITERATIVE, COMMUNICATING OFTEN, & CLOSING THE LOOP

Creating spaces for frequent input, and feedback, and closing the loop to engage all stakeholders throughout the process and develop more inclusive and creative solutions.

This characteristic is really at the heart of creating enthusiasm for your organization's vision and engagement from people to contribute to crafting it. It is a common occurrence with strategic plan execution that the leadership may feel like staff isn't as motivated towards the plan as they'd like, and staff may feel a bit lost or disconnected from the overall vision, like they're kept in the dark about the company direction or how their input is being taken forward. It can become a vicious cycle, but there is a simple remedy for this predicament: communicate often. This means before, during, and after, even when the leadership team might be doing some "behind the scenes" consolidation and refining. It is critical to bridge the gap between leadership's efforts and the staff's awareness of these efforts.

Characteristic #3

ITERATIVE, COMMUNICATING OFTEN, & CLOSING THE LOOP

**REMEMBER,
THIS IS NOT A QUICK AND
EASY APPROACH!**

You must let go of total efficiency for inclusivity. Rest assured, it is worth it. Spending sufficient time uncovering gaps will lead your team to more grounded solutions.

The practice of providing updates back to the people who provided their input can also be called "closing the loop." Closing the loop is also valuable anytime leadership states their intention to make some kind of organizational change. When this step is missed, trust can deteriorate and people may be less likely to share their input next time.

The people further away from the decision-making may feel less empowered and inspired by the organization's goals. Providing these folks with updates from leadership more regularly throughout the process creates more opportunities for them to develop greater buy-in towards the goals and motivation to contribute to it.

ITERATIVE, COMMUNICATING OFTEN, & CLOSING THE LOOP

Creating spaces for frequent input, and feedback, and closing the loop to engage all stakeholders throughout the process and develop more inclusive and creative solutions.

REMEMBER...

✓ **Map out your communication plan before, during, and after you request something from stakeholders.**

- ❑ **Before:** Create awareness that the request is coming. Aim to set expectations and prepare folks that something is about to happen.
- ❑ **During:** Provide guidance and ensure people understand when to complete the task(s). Follow-ups are helpful during this stage.
- ❑ **After:** Make sure to close the loop by thanking them for their input and letting them know how it will be used. Lastly, let them know what to expect moving forward.

✓ **Do something with feedback:**

Don't ask for feedback if you're not going to use it. And even if there aren't changes, let them know why you keep it the same and where you're at in your process.

✓ **Define the stages of when you'll gather input or feedback:**

Stakeholder input is especially helpful at the early stages of your strategic planning when you are conducting internal and external analyses, but don't overlook the importance of building in checkpoints to collect feedback throughout the process as well. Don't get too attached to your plan! You want to allow people to actually validate it and have the ability to influence its direction. Examples of stages to collect feedback: (1) Strategic direction and vision, (2) Strategic priorities, goals, and objectives, (3) Metrics, action plans, and timeline, (4) Resource allocation (talent, budget, etc) and, (5) Strategy launch, implementation, and monitoring.

Characteristic #3

ITERATIVE,
COMMUNICATING
OFTEN, & CLOSING
THE LOOP

ITERATIVE, COMMUNICATING OFTEN, & CLOSING THE LOOP

Creating spaces for frequent input, and feedback, and closing the loop to engage all stakeholders throughout the process and develop more inclusive and creative solutions.

PONDER THIS...

What are the proactive actions that your organization is taking to increase the response rates to surveys and requests for input?

What actions is your organization taking to remove barriers for people to be able to respond honestly with their feedback or input?

At what points of your process are you currently communicating to your stakeholders, especially staff?

EXTEND YOUR LEARNING

1. [ARTICLE](#): This article by Forbes provides "Seven Steps To Engage Your Employees In Strategic Planning"
2. [ARTICLE](#): This article by Gartner describes the "5 Pillars of Successful Strategy Execution," including a section on strategy communication.

Characteristic #3
ITERATIVE,
COMMUNICATING
OFTEN, & CLOSING
THE LOOP

#4

INCLUDING THE MAJORITY & THE MARGINS

INCLUDING THE MAJORITY & THE MARGINS

Eliminating the possibility of bias from entering the process at all stages, especially in data collection, analysis, and synthesis. The greatest insights often come from the frequently overlooked margins.

SMALL PERCENTAGE ≠ LITTLE IMPORTANCE

When organizations analyze data, it may be easy to gravitate toward the majority figure and use that perspective to frame the way forward. Organizations might assume that since it is the largest figure, it should be placed above others. This bias could lead organizations to sometimes forget about the 30%, or 15%, or even the 3% – the margins.

If our intention is to be inclusive of all people in our organization, we must pay equal attention to every piece of input. We should ask ourselves ... Who is providing this input? What level of power do they hold? Have they been historically marginalized? Are they disadvantaged societally and/or in our organization? It is worthwhile to consider how the people with less prevalent perspectives perceive the strategic direction; just because the people in the majority group think it is the best idea doesn't mean that it is the best idea.

What's more, organizations that continuously overlook the margins can perpetuate greater disparities. 30% may not seem like much, it's less than half of the organization, but that 30% could be 300 people (that's a lot of people). We lose critical context and nuance when we oversimplify or overgeneralize. A way to gain an honest picture of our current state is to decouple the idea that a marginal percentage represents a marginal perspective worth considering.

**IT'S NOT ONLY ABOUT
DE-CENTERING THE
MAJORITY BASED ON
DEMOGRAPHICS...**

We should also consider de-centering the majority's opinions and experiences. These can often overlap, but it is vital to distinguish between them.

Characteristic #4

**INCLUDING THE
MAJORITY & THE
MARGINS**

INCLUDING THE MAJORITY & THE MARGINS

Eliminating the possibility of bias from entering the process at all stages, especially in data collection, analysis, and synthesis. The greatest insights often come from the frequently overlooked margins.

REMEMBER...

How am I collecting data?

It's important to be intentional about the language and structure that you use to collect data. For example, avoid asking leading questions and multiple questions packaged as one. If you intend to ask open-ended questions, it's helpful to streamline your process beforehand to be clear on what you're hoping to learn from the responses. Secondly, be cautious of over-aggregating your data. If you opt for an "other" option on a survey, how are you treating it? Be sure to use this category intentionally.

What survey response rate do I need to feel confident in drawing conclusions from?

Your team should decide on a minimum response rate required to be able to deem the data representative. Our team usually uses the 80/20 Rule as a baseline: determining that an 80% response rate is a minimum to be able to move forward. The goal is always 100% and there are a number of proactive ways to help you get closer to this number, but there are always unforeseen circumstances and a variety of reasons why a person may not respond. In an organization of 100 people, 80% response rate would be a statistically significant sample size with a 95% confidence rate.

Is it relevant to get everyone's opinions or not?

Consciously determine whose input you'd like to target. It's not always the case where you need to gather input across the whole organization. Survey fatigue is real – try to avoid it.

Characteristic #4

INCLUDING THE MAJORITY & THE MARGINS

INCLUDING THE MAJORITY & THE MARGINS

Eliminating the possibility of bias from entering the process at all stages, especially in data collection, analysis, and synthesis. The greatest insights often come from the frequently overlooked margins.

PONDER THIS...

Reflect on the last few times that you have collected and gathered data in your organization.

***How did you analyze
the quantitative data?
Qualitative data?***

***If you created output,
how did you choose what
information was included?***

***Did you prioritize
the majority opinions
to make strategic
decisions?***

EXTEND YOUR LEARNING

1. **RESOURCE:** *Racial Equity Tools provides a guide on how to assess, learn from, and document racial equity work.*
2. **EXAMPLE:** *Check out this method to reduce bias when analyzing data from surveys.*

Characteristic #4

INCLUDING THE
MAJORITY & THE
MARGINS

INCLUDING THE MAJORITY & THE MARGINS

FROM THE MARGINS TO THE CENTER

A method to minimize bias when collecting data via surveys

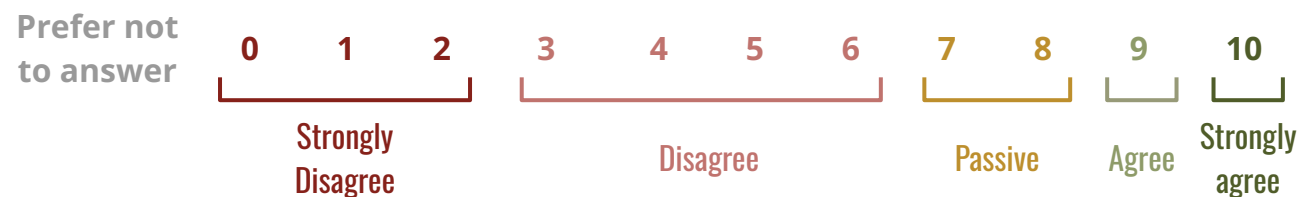
The nature of diversity, equity, and inclusion is to shine light on different perspectives and center people that may have been set aside to the margins. The way we collect input and feedback about employee experiences can affect how the data gets interpreted. It is important to note that bias can enter data gathering from both the side of the survey creator as well as the respondent.

Similar to Net Promoter Score which evaluates customer satisfaction, in this approach, survey creators can use a scale from 0-10 that evaluates stakeholder satisfaction across various topics and by design, emphasizes lower-ranking answer choices.

Stakeholders who respond 9-10 to a question can be considered enthusiastic about a particular aspect. Responses between 7-8 can be interpreted as passive because these are people who might be satisfied enough but unenthusiastic, and would still say that there is room for improvement. Scores between 7-8 are not bad scores by any means, and they are also not completely positive – they reflect a passive response that indicates there is space for improvement. Responses between 0-6 are considered folks who have specific aspects of dissatisfaction regarding a topic and scores between 0-2 can be interpreted as expressing deeper dissatisfaction.

Red, Yellow, Green

Scores are categorized into shades of red, yellow, and green to reflect the weighting and mean scores. A 'Prefer not to answer' option is also included, reflected in gray.



Characteristic #4

INCLUDING THE MAJORITY & THE MARGINS

INCLUDING THE MAJORITY & THE MARGINS

Example Chart

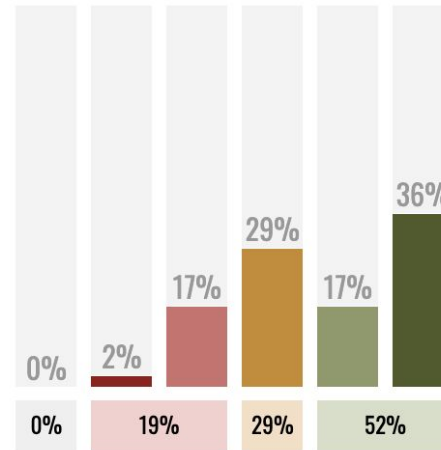


Chart Elements

- Scores are categorized into gray, dark red, light red, yellow, light green, and dark green buckets
- The gray category reflects the people who preferred not to answer
- Percentage of responses that fall into one range of scores are broken down by each color
- Sums of the gray, overall red, yellow, and green percentages are at the bottom

Prefer not to answer



How to Read Your Data: Center the Underrepresented

Although there may be a high number of responses in the green, take special note of red and yellow sections that might contain people who feel excluded. There is great benefit in recognizing the positive aspects of the organization and we encourage that. It is also equally important to have a critical eye in order to allow for greater growth.

The colors can be used to prioritize which areas to focus on first - the ones with any in the red category are the highest priority, if there are no red then the ones with yellow become second priority, and if there are no red or yellow responses those can be celebrated until it's time to reevaluate again and benchmark progress.

Characteristic #4

INCLUDING THE MAJORITY & THE MARGINS

#5

CLEAR & CONCISE LANGUAGE

CLEAR & CONCISE LANGUAGE

Avoiding unnecessarily complicated or complex words in surveys, statements, and deliverables. Keep it simple.

Every exchange of information between one person and another includes a sender and a receiver. The effectiveness of the sender's communication is dependent on how it is transmitted to and absorbed by the receiver. This is the baseline for how the receiver will interpret the message and take action. As the sender, we should first determine the desired outcome of our communication. What is it that we want people to understand or do differently? Next, consider how the receiver may interpret our message based on the language we choose, the framing, and the structure.

“Everything should be made as simple as possible, but not simpler.”

ALBERT EINSTEIN

“Making the simple complicated is commonplace; making the complicated simple, awesomely simple, that's creativity.”

CHARLES MINGUS

Simplicity makes communication powerful. Be deliberate about how you adapt the message to fit the receiver and keep it as straightforward as possible. All of this takes effort from the sender. Look out for an inclination to move too fast, that may cause you to miss this step. Again, it's not about communicating as fast as possible, but rather, as clearly as possible.

Ensuring clear and concise communication isn't just a “nice to have” to effectively convey our strategic direction and plans, it is a “must have” for ensuring equity. For example, simplifying our communication could increase efficiency in meetings, help people who aren't native English speakers process more quickly, help ease translation efforts, or support folks who have different reading abilities. At the end of the day, it creates a better experience for all.

Characteristic #5

CLEAR & CONCISE LANGUAGE

CLEAR & CONCISE LANGUAGE

Avoiding unnecessarily complicated or complex words in surveys, statements, and deliverables. Keep it simple.

REMEMBER...

Center the receiver:

It's always easier to communicate in ways that feel natural to us. With this in mind, try to be intentional about centering the receiver instead of yourself. If you're trying to enact change or help people understand something, it's helpful to speak their language.

Get a variety of perspectives:

Ask multiple people to proofread your communications. Get support from others if you are struggling with how to simplify communication or how it connects with different groups of people.

It's not just about your words:

Consider the layout and design of your communications as well. For example, ask yourself if that email needs to be as long as it is or if some of the text could be put into an attachment. Or, how about utilizing formatting (i.e. bolding text or increasing font size) to emphasize the most important and urgent parts of your messages? Your communications should be able to be conveyed clearly and concisely across various media types: one-pagers, presentations, speeches, emails, etc.

Characteristic #5

CLEAR & CONCISE LANGUAGE

CLEAR & CONCISE LANGUAGE

Avoiding unnecessarily complicated or complex words in surveys, statements, and deliverables. Keep it simple.

PONDER THIS...

What outcome are you looking for as a result of your message?

Have you considered how your communications translate into different types of media or languages?

What are you really trying to learn from their answers?

EXTEND YOUR LEARNING

1. [MODEL](#): The 4MAT Model is a framework for learning that demonstrates how to deliver information in more dynamic and engaging ways.
2. [GUIDE](#): A Progressive's Style Guide by Hanna Thomas and Anna Hirsh guides on inclusive language.
3. [RESOURCE](#): Material Design provides resources and principles for accessibility in UI.

Characteristic #5
CLEAR & CONCISE
LANGUAGE

#6

SHARED OWNERSHIP & ACCOUNTABILITY

SHARED OWNERSHIP & ACCOUNTABILITY

Ensuring equitable distribution of roles and responsibilities for the execution of the strategy and building in methods for accountability and sustainability from the start.

OWNERSHIP

If we are to consider two extremes, decision-making power can either be centralized or decentralized. In the centralized scenario, the top of the hierarchy makes all of the decisions. This scenario is very efficient, but not necessarily the most comprehensive. On the other end, in the decentralized scenario, everyone has equal ownership of making decisions. This scenario is likely to be chaotic and inefficient but may be more effective. We want to find a middle ground that allows everyone to do their best job.

Sometimes there is a false notion of shared ownership when organizations are creating and implementing strategic plans. Leadership might think they are giving power and influence to everyone, but instead, they may be intentionally or unintentionally disregarding it. If the strategic plan is for everyone, then everyone's input should be included. This doesn't mean that everyone needs to be the final decision maker, but that their input is genuinely considered in the process. Honest, shared ownership can lead to greater stakeholder buy-in, participation, and involvement.

ACCOUNTABILITY

Shared accountability is about sharing the responsibility of execution and having structures in place to check in on progress, provide feedback, and ultimately ensure everyone is doing what they said they were going to do. Organizations should identify which groups have accountability over different aspects of the strategy and if their level of power and influence matches it. Within organizations, leadership often has the highest level of decision-making power and influence, so high levels of accountability make sense for this group. A problem can occur when accountability is passed down or across the organization to groups that don't hold the same level of power and influence, yet are expected to have the same level of accountability.

There's a critical difference between granting permission and cultivating shared accountability. It is not enough for folks to be granted permission, they must also be provided with the appropriate level of authority and decision-making power for them to be able to see it through to success. Ultimately, leadership needs to be ingrained in and invested in the plan for it to succeed.

WATCH OUT FOR THIS→

If multiple people are responsible, nobody is really responsible. There's a difference between shared ownership of a task vs. shared buy-in and accountability. At the end of the day, we need one main responsible for the execution of a task. For example, it is possible to have two or three people who share the same level of ownership, but be sure to distribute the specific responsibilities between them. Setting clear expectations about who is ultimately responsible for making sure a task gets done is helpful for efficient strategy execution and for maintaining morale.

Characteristic #6

SHARED OWNERSHIP & ACCOUNTABILITY

SHARED OWNERSHIP & ACCOUNTABILITY

Ensuring equitable distribution of roles and responsibilities for the execution of the strategy and building in methods for accountability and sustainability from the start.

REMEMBER...



Establish checkpoints of reflection:

Build checkpoints into your process so that everyone has a way to hold each other accountable. These checkpoints can take the form of surveys, suggestion boxes, or any format that allows people to raise their voice. As part of these checkpoints, embed a reporting mechanism to share the goal progress.



Balancing experience with energy:

Ask people what they are interested in working on during role allocation and try to allocate tasks accordingly. If nobody on the team wants to do a certain task, look for ways to fairly distribute these tasks while accounting for people's interests and what energizes them.



Equitably distribute responsibilities:

When a team is tasked with wearing many hats, it becomes increasingly important to fairly distribute the responsibilities of tasks that are less desired. One example might be taking meeting minutes. This task makes it more challenging for the responsible to actively participate in meetings, so we highly recommend rotating the responsibility.



Build in continuity:

Often, strategic plans span multiple years and personnel changes can take place. Create a backup plan to ensure smooth transitions of task ownership. Consider who might take on each role if the person responsible leaves or is on vacation. Or if people can't get in touch with the task responsible, who should they contact?

Characteristic #6

**SHARED
OWNERSHIP &
ACCOUNTABILITY**

SHARED OWNERSHIP & ACCOUNTABILITY

Ensuring equitable distribution of roles and responsibilities for the execution of the strategy and building in methods for accountability and sustainability from the start.

PONDER THIS...

How could you distribute the ownership of responsibilities for executing the strategic plan in a way that leverages people's interests, influence, and skills?

How are you planning for continuity of strategic plan execution regardless of personnel changes?

Are there checkpoints for reflection that build in space for evolutions and iterations that might improve the plan?

EXTEND YOUR LEARNING

1. [SCIENTIFIC ARTICLE](#): Foundational article regarding what defines workplace motivation (Basset-Jones & Lloyd, 2005).
2. [SCIENTIFIC ARTICLE](#): Article regarding organizational design and how to address task division & task allocation (Purnam et al, 2014).
3. [ARTICLE](#): How Ikigai, "The Japanese Secret to a Joyful Life," can support people in finding energizing work.

Characteristic #6

**SHARED
OWNERSHIP &
ACCOUNTABILITY**

Part 2:

BUILDING YOUR DEI-INFORMED STRATEGIC PLAN

BUILDING YOUR DEI-INFORMED STRATEGIC PLAN

STRATEGY HOUSE

We recommend using a framework called a Strategy House. A Strategy House can be used to map out your organization's strategy. It includes your organization's mission, vision, strategic priorities, goals and metrics, structure and capacity, and values. This guidebook aims to support you with creating a process to determine them for your organization.



#1 KICKOFF ○

#2 CURRENT STATE ○

#3 VISION & STRATEGIC PRIORITIES ○

#4 IMPLEMENTATION & PROJECT PLANNING ○

#5 PUBLISH & COMMUNICATE ○

#6 WRAP-UP ○

STRATEGIC PLANNING PROCESS

This approach is designed to be a comprehensive step-by-step guide for you to build your DEI-informed strategy. If you're working with more limited resources, we've incorporated alternatives you can explore. As you go through this upcoming section, take note of which options best fit your organization's reality at this point.

STRATEGIC PLANNING PROCESS TIMELINE

This is a sample timeline that we would recommend for an organization’s strategic planning process. This timeline spans 12 months, but you may consider going faster or slower depending on your organization’s resources and bandwidth. In the following pages, you will find expanded detail about what goes into each of these phases, activities and resources to support you in their implementation, and best case practices.

MONTH	1		2		3		4		5		6	
Phase 1: Kickoff	X	X										
Phase 2: Current State			X	X	X							
Phase 3: Vision & Strategic Priorities						X	X	X	X	X	X	
Phase 4: Implementation & Project Planning											X	X

MONTH	7		8		9		10		11		12	
Phase 4: Implementation & Project Planning	X	X	X	X								
Phase 5: Publish & Communicate					X	X	X	X	X			
Phase 6: Wrap-up										X	X	X

TIP

It may be helpful to have the following resources on hand as you work through this guidebook:

- Your company calendar
- Organizational chart
- List of stakeholders
- Communication channels

SAVE IT FOR LATER

On pg 53, you will find a blank plan outline that you can fill in with the timeline that best fits your organization’s needs.

PHASE 1

Kickoff

1. Kick-Off Meeting

Align with organizational leaders and key stakeholders on objectives, timeline, approach, and overall scope of the project. Collect relevant documentation and data for project success and to understand the organizational context and emerging pain points. Depending on the stakeholders involved, more than one meeting may be necessary.

Expected outcomes: Clarity within your team regarding the distribution of responsibilities and alignment of project timelines and tasks.

2. Training: Creating Sustainable Strategies

Conduct training for folks participating in the strategic planning process to establish a shared language for DEI and strategy creation, explore the factors that should be considered when developing a DEI strategy for your organization, and learn the next steps for the strategy creation process.

Expected outcomes: Alignment on key terms for DEI and strategic planning process. Clarity about how to effectively develop and implement a DEI-informed strategy.

PHASE 2

Current State

3. Discovery & Current State Assessment

Conduct interviews with key stakeholders that focus on questions that aim to understand the current state of operations, culture, and strategy. Gather any data, documents, or materials that may be helpful in understanding the current state. Review and analyze relevant documents and interviews.

Expected outcomes: Shared and comprehensive understanding of the current state, including strengths, gaps, and opportunities to bring to the planning process.

4. Survey: Vision, Strategy, & Current State Input & Ideas

Conduct an organization-wide survey to gather input from staff and key stakeholders for the future direction of DEI strategy and understand the employee experience in regard to inclusion and equity in the organization. Consolidate survey results, integrate results with interview data, and analyze findings to identify trends.

Expected outcomes: A more holistic view of the current state from a broad range of perspectives and stakeholders and insight into where stakeholders would like to see the organization go that will be used as a starting point for discussion at the visioning workshop.

5. Workshop: Visioning

Conduct an organizational retreat or workshop(s) to align on the current state, identify trends, and co-create vision with organizational leaders. Key activities include: reviewing the data, synthesizing the data, brainstorming vision and direction, and validation with employee focus groups to gather a variety of data points (reactions, what resonates, questions, concerns, ideas for projects, etc.).

Expected outcomes: Alignment on the current state and initial draft of a vision for the organization.

6. Survey: Vision Feedback & Validation

Present vision draft, and gather employee and stakeholder impressions and feedback (reactions, what resonates, questions, concerns, ideas for strategic priorities, etc.).

Expected outcomes: Understanding of what works and what needs clarification or improvement to increase clarity and adoption of vision.

7. Workshop: Finalizing Vision

With a representative task force (~3-5 people), utilize the feedback from the survey to adjust and refine the vision for the long term (~15-20 yrs), mid-term (~3-5 yrs), and short term (~6 mo-1 yr).

Expected outcomes: Agreed upon final version of the vision for the organization.

8. Workshop: Strategic Priorities Brainstorming

Use the information from the initial survey as well as the output from the visioning workshop(s) and final vision to brainstorm strategic priorities for the short and/or mid-term.

Expected outcomes: Initial draft of strategic priorities for the organization.

9. Survey: Strategic Priorities Feedback & Validation

Present strategic priorities draft, and gather employee and stakeholder impressions and feedback (reactions, what resonates, questions, concerns, ideas for strategic priorities, etc.).

Expected outcomes: Understanding of what works and what needs clarification or improvement to increase clarity and adoption of strategic priorities.

10. Workshop: Finalizing Strategic Priorities

With a representative task force (~3-5 people), utilize the feedback from the survey to adjust and refine the strategic priorities.

Expected outcomes: Agreed upon final version of the short and/or mid-term strategic priorities determined for the organization.

11. Workshop: Identifying Projects within Strategic Priorities

Determine the projects that will support achievement of the strategic priorities.

Expected outcomes: List of projects for each strategic priorities created.

12. Survey: Project Team Interest & Responsibilities Allocation

Present projects to relevant stakeholders and gather interest from folks regarding which projects they would like to lead and/or support. Equitably allocate roles and responsibilities across the leadership, staff, and other key stakeholders.

Expected outcomes: Structure & Capacity plan created outlining who is responsible for what for the strategic plan.

13. Workshop: Project Objectives & Metrics

Craft the objectives for the projects as well as the metrics that will support tracking progress and reporting. Create the spreadsheet (or other mechanism) to house the strategic plan and project tracking.

Expected outcomes: A set of project objectives and metrics for each project determined. A spreadsheet (or other tool) for tracking created.

14. Workshop: Project Timelines & Action Plans

Project Leads and Teams work together to outline the duration, timeline, action steps, and resources required to accomplish their projects. Ensure that projects are staged in a manner that balances resources and is intentional about priorities (i.e. if one project's initiation is dependent on the completion of another project).

Expected outcomes: Overall timeline outlined for the short and mid-term including action plans for all projects occurring in the short and mid-term. Initial draft created of budgets for projects in the short term (and mid-term if possible).

15. Workshop: Accountability Structures

Co-create a process for tracking and measuring progress toward projects, strategic priorities, and vision. Create a plan for the longevity of the strategic plan execution including primary and secondary strategic plan accountables to reduce single-point sensitivity. Develop a plan for reporting progress to internal and external stakeholders.

Expected outcomes: Plan for Strategic Plan accountability established.

PHASE 5

Publish & Wrap-Up

16. Finalizing & Presenting Strategic Plan

Put the finishing touches on the strategic plan and create the documents/collateral to be shared with all internal and external stakeholders.

Expected outcomes: Strategic plan available and accessible to internal and external stakeholders.

17. Rollout Planning Meeting

Create a plan to communicate and share the strategic plan with other stakeholders of the organization.

Expected outcomes: Communication plan outlined for sharing the strategic plan.

18. Strategic Plan Communication

Communicate and share the strategic plan with other stakeholders of the organization.

Expected outcomes: Clarity and awareness of the strategic plan for all stakeholders of the organization.

PHASE 6

Wrap-Up

19. Project Wrap-Up

Conclude the project and debrief the process. Discuss any next steps or pending action items.

Expected outcomes: Strategic planning process completed with clear steps for how to execute and take action towards it.

PHASE 1: KICKOFF

1. Kickoff Meeting

DURATION

0.5-1 hr,
2-3 wks

DESCRIPTION:

Align with organizational leaders and key stakeholders on objectives, timeline, approach, and overall scope of the project. Collect relevant documentation and data for project success and to understand the organizational context and emerging pain points. Depending on the stakeholders involved, more than one meeting may be necessary.

EXPECTED OUTCOME:

Clarity within your team regarding the distribution of responsibilities and alignment of project timelines and tasks.

TIP:

It's really important at this stage to ensure all of your leadership team participates and is aware of what the process will entail.

ACTIVITY: STAKEHOLDER MATRIX

The purpose of this activity is to reflect on the positionality of stakeholders based on their power and how directly impacted they are by the project. We recommend this activity take place either before or during the kick-off meeting. This activity can also inform which stakeholder you conduct kickoff meetings with.

See Activity Worksheet on the next page →

2. Training: Creating Sustainable Strategies

DURATION

0.5-1 hr

DESCRIPTION:

Conduct training for folks participating in the strategic planning process to establish a shared language for DEI and strategy creation, explore the factors that should be considered when developing a DEI strategy for your organization, and learn the next steps for the strategy creation process.

EXPECTED OUTCOMES:

- Alignment on key terms for DEI and strategic planning process.
- Clarity about how to effectively develop and implement a DEI-informed strategy.

TIPS:

- These trainings should have 100% participation from people involved in the process for a more aligned outcome.
- If the outcome has already been met (your team has already received sufficient training), you may not need to include this step in your strategic planning process.

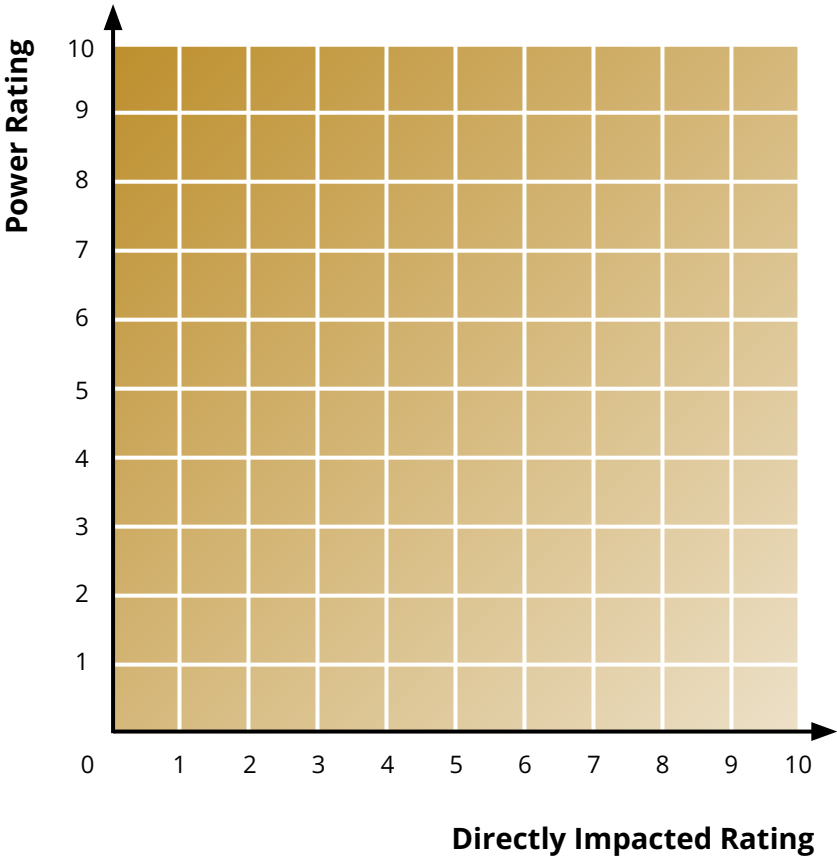
ACTIVITY: STAKEHOLDER MATRIX

INSTRUCTIONS

- 1. List out all of the stakeholders who are involved in the project and are impacted by the project.
- 2. Map all stakeholders on a matrix of power and direct-impact.
 - a. Measuring Power: How much power and decision-making ability does this stakeholder have in this project? (Rate on a scale from 1 - 10 with 1 being no power at all & 10 being all of the power)
 - b. Measuring Direct-Impact: How much is this stakeholder directly impacted by this project? (Rate on a scale from 1 - 10 with 1 being not directly impacted at all & 10 being completely directly impacted)
- 3. Reflect on how stakeholders' positions on the matrix impact them and your strategy.
- 4. Map out the stakeholders who might be missing from the matrix and/or are not yet represented.
- 5. Create a plan of how you can bring these stakeholders in.

STAKEHOLDER LIST	POWER RATING	DIRECTLY IMPACTED RATING

STAKEHOLDER MAPPING



PHASE 2: CURRENT STATE

3. Discovery & Current State Assessment

DURATION

6-8 hrs,
2-4 wks

DESCRIPTION:

Conduct interviews with key stakeholders that focus on questions that aim to understand the current state of operations, culture, and strategy. Gather any data, documents, or materials that may be helpful in understanding the current state. Review and analyze relevant documents and interviews.

EXPECTED OUTCOME:

Shared and comprehensive understanding of the current state, including strengths, gaps, and opportunities to bring to the planning process.

TIP:

Ensure there is a representative group of people conducting the interviews.

4. Survey: Vision, Strategy, & Current State Input & Ideas

DURATION

4-7 wks

DESCRIPTION:

Conduct an organization-wide survey to gather input from staff and key stakeholders for the future direction of DEI strategy and understand the employee experience in regard to inclusion and equity in the organization. Consolidate survey results, integrate results with interview data, and analyze findings to identify trends.

EXPECTED OUTCOME:

A more holistic view of the current state from a broad range of perspectives and stakeholders and insight into where stakeholders would like to see the organization go that will be used as a starting point for discussion at the visioning workshop.

ACTIVITY: STAKEHOLDER COMMUNICATIONS

An essential factor for this step is to ensure your communications reach people fairly, meaning there should be varied formats, clear and concise language, and plans to include everyone in the organization. This activity helps you map out your communications regarding the survey.

See Activity Worksheet on the next page →

ACTIVITY: STAKEHOLDER COMMUNICATIONS

INSTRUCTIONS

1. Reference the list of your organization's communication channels.
2. Take a moment to sketch out your plan to gather input from stakeholders internal and external of your organization. Consider the content, style, format, and cadence of the communications.
3. Map it out: Is there something for everyone at some point throughout the process? Use this template to see how balanced it is.
4. Reflect on how you can include the people in the margins of your organization in this plan.

	Phase	Stakeholder(s)	Cadence	Format(s)	Style(s)
Ex:	Survey	Staff	Once a week for 3 weeks	Staff meeting, email, internal messaging platform	Oral, written
1					
2					
3					
4					
5					
6					

PHASE 3: VISION & STRATEGIC PRIORITIES

5. Workshop: Visioning

DURATION
2-4 hrs,
1 wk

DESCRIPTION:

Conduct an organizational retreat or workshop(s) to align on the current state, identify trends, and co-create vision with organizational leaders. Key activities include: reviewing the data, synthesizing the data, brainstorming vision and direction, and validation with employee focus groups to gather a variety of data points (reactions, what resonates, questions, concerns, ideas for projects, etc.).

EXPECTED OUTCOME:

Alignment on the current state and initial draft of a vision for the organization.

TIP:

Ensure that you have leadership and staff present for this workshop at a minimum, and you may consider adding more external stakeholders such as volunteers or donors.

ACTIVITY: AGENDA OF VISIONING WORKSHOPS

A clear agenda can make a significant difference in conducting these workshops effectively. Check out a sample agenda that can serve as inspiration.

See Activity Worksheet on the next page →

6. Survey: Vision Feedback & Validation

DURATION
3-5 wks

DESCRIPTION:

Present vision draft, and gather employee and stakeholder impressions and feedback (reactions, what resonates, questions, concerns, ideas for strategic priorities, etc.).

EXPECTED OUTCOME:

Understanding of what works and what needs clarification or improvement to increase clarity and adoption of vision.

The timeline of this phase depends on the size and meeting availability of your team. Smaller teams may be able to talk through some of these points, whereas larger teams with less availability may prefer a survey format. Additionally, consider how frequently are people able to meet? This timeline will look very different depending on the answer.

We recommend keeping the timeline of the first workshop, but following the survey, you could opt for a condensed workshop schedule. For example, all workshops could be held within one day or over a weekend retreat.

ACTIVITY: AGENDA OF VISIONING WORKSHOPS

WORKSHOP #1

Before

- Consolidate and anonymize data from input input-gathering process.

During

- Check-in and review meeting objectives.
- Ground everyone in the existing mission.
- **Vision:**
 - ◆ Review ideal outcomes and what people envision (survey responses).
 - ◆ Discuss how to achieve ideal outcomes.
 - ◆ Determine vision statement.
- **Strategic priorities:**
 - ◆ Review urgent and important priorities (survey responses).
 - ◆ Discuss strategic priorities, consolidate similar responses, and narrow down options.
 - ◆ Select 2-3 strategic priorities.

After

- Launch results to stakeholders (i.e. staff, leadership, volunteers) and ask for their feedback

WORKSHOP #2

During

- Create a final draft of the vision statement: adjust the document with feedback from key stakeholders.
- Create a final draft of strategic priorities.

After

- Align on next steps and how to communicate with stakeholders.

PHASE 3: VISION & STRATEGIC PRIORITIES

7. Workshop: Finalizing Vision

DURATION
1.5 hrs,
1 wk

DESCRIPTION:

With a representative task force (~3-5 people), utilize the feedback from the survey to adjust and refine the vision for the long term (~15-20 yrs), mid-term (~3-5 yrs), and short term (~6 mo-1 yr).

EXPECTED OUTCOME:

Agreed upon final version of the vision for the organization.

8. Workshop: Strategic Priorities Brainstorming

DURATION
2-4 hrs,
1 wk

DESCRIPTION:

Use the information from the initial survey as well as the output from the visioning workshop(s) and final vision to brainstorm strategic priorities for the short and/or mid-term.

EXPECTED OUTCOME:

Initial draft of strategic priorities for the organization.

9. Survey: Strategic Priorities Feedback & Validation

DURATION
3-5 wks

DESCRIPTION:

Present strategic priorities draft, and gather employee and stakeholder impressions and feedback (reactions, what resonates, questions, concerns, ideas for strategic priorities, etc.).

EXPECTED OUTCOME:

Understanding of what works and what needs clarification or improvement to increase clarity and adoption of strategic priorities.

10. Workshop: Finalizing Strategic Priorities

DURATION
1.5 hrs,
1 wk

DESCRIPTION:

With a representative task force (~3-5 people), utilize the feedback from the survey to adjust and refine the strategic priorities.

EXPECTED OUTCOME:

Agreed upon final version of the short and/or mid-term strategic priorities determined for the organization.

PHASE 4: IMPLEMENTATION & PROJECT PLANNING

11. Workshop: Identifying Projects within Strategic Priorities

DURATION
1.5 hrs,
1 wk

DESCRIPTION:

Determine the projects that will support the achievement of the strategic priorities.

EXPECTED OUTCOMES:

List of projects for each of the strategic priorities created.

TIP:

The list does not need to be long. The more focused the better.

12. Survey: Project Team Interest & Responsibilities Allocation

DURATION
3-5 wks

DESCRIPTION:

Present projects to relevant stakeholders and gather interest from folks regarding which projects they would like to lead and/or support. Equitably allocate roles and responsibilities across the leadership, staff, and other key stakeholders.

EXPECTED OUTCOMES:

Structure & Capacity plan created outlining who is responsible for what for the strategic plan.

TIP:

Once you've collected the data from the survey, allocate responsibilities based on what energizes people the most. This will help to minimize the number of energy-draining activities team members have to do and increase overall motivation for the work.

PHASE 4: IMPLEMENTATION & PROJECT PLANNING

13. Workshop: Project Objectives & Metrics

DURATION
1.5 hrs,
1 wk

DESCRIPTION:

Craft the objectives for the projects as well as the metrics that will support tracking progress and reporting. Create the spreadsheet (or other mechanism) to house the strategic plan and project tracking.

EXPECTED OUTCOMES:

1. A set of project objectives and metrics for each project determined.
2. A spreadsheet (or other tool) for tracking created.

14. Workshop: Project Timelines & Action Plans

DURATION
1.5 hrs,
1 wk

DESCRIPTION:

Project Leads and Teams work together to outline the duration, timeline, action steps, and resources required to accomplish their projects. Ensure that projects are staged in a manner that balances resources and is intentional about priorities (i.e. if one project's initiation is dependent on the completion of another project).

EXPECTED OUTCOMES:

1. Overall timeline outlined for the short and mid-term including action plans for all projects occurring in the short and mid-term.
2. Initial draft created of budgets for projects in the short term (and mid-term if possible).

15. Workshop: Accountability Structures

DURATION
1.5 hrs,
1 wk

DESCRIPTION:

Co-create a process for tracking and measuring progress toward projects, strategic priorities, and vision. Create a plan for the longevity of the strategic plan execution including primary and secondary strategic plan accountables to reduce single-point sensitivity. Develop a plan for reporting progress to internal and external stakeholders.

EXPECTED OUTCOMES:

Plan for Strategic Plan accountability established.

PHASE 5: PUBLISH & COMMUNICATE

16. Finalizing & Presenting Strategic Plan

DURATION
1.5 hrs,
2 wks

DESCRIPTION:

Put the finishing touches on the strategic plan and create the documents/collateral to be shared with all internal and external stakeholders.

EXPECTED OUTCOMES:

Strategic plan available and accessible to internal and external stakeholders.

17. Rollout Planning Meeting

DURATION
0.5-1 hr,
1 wk

DESCRIPTION:

Create a plan to communicate and share the strategic plan with other stakeholders of the organization.

EXPECTED OUTCOMES:

Communication plan outlined for sharing the strategic plan.

ACTIVITY: COMMUNICATIONS PLAN

The purpose of this activity is to provide a template for planning your strategic plan communications to stakeholders.

See Activity Worksheet on the next page →

18. Strategic Plan Communication

DURATION
4-6 wks

DESCRIPTION:

Communicate and share the strategic plan with other stakeholders of the organization.

EXPECTED OUTCOMES:

Clarity and awareness of the strategic plan for all stakeholders of the organization.

ACTIVITY: COMMUNICATIONS PLAN

INSTRUCTIONS

1. Reference the list of your organization's communication channels.
2. Use the table below to map out the phases of your communications, the stakeholders the involved in that phase, how often communications will be sent, the format(s) of these communications, as well as the style(s).
3. Determine which communication channels you will use during each phase.

Be sure to consider...

Which stakeholder groups should be informed first? Will these stakeholders have a role to play in communicating the strategy to others in the following phases?

	Phase	Stakeholder(s)	Cadence	Format(s)	Style(s)	Channels
Ex:	Survey launch	Board, Sr. Leadership	Once	Board meeting, email	Oral, written	
1						
2						
3						

PHASE 6: WRAP-UP

18. Project Wrap-up

DURATION
1 hr,
1 wk

DESCRIPTION:

Conclude the project and debrief the process. Discuss any next steps or pending action items.

EXPECTED OUTCOME:

Strategic planning process completed with clear steps for how to execute and take action towards it.

TIP:

Debrief your process and experience by asking questions to your team like:

- What went really well about this process?
- What could we do differently next time to make it even better?
- What did we learn from utilizing a DEI-informed approach?
- What new ideas do we have about equity, inclusion, and diversity, in our organization as a whole?

Once you've completed your strategic planning process, start to explore what other areas of your organization are perpetuating bias, exclusion, or inequity. Here's a list of operational areas to review that can get you started:

OVERALL

- Organization Structure
- DEI Goals & Involvement
- Vision & Goals
- Reporting & Metrics

OPERATIONS

- Marketing & Positioning
- Vendors & Partners
- Programming

INFRASTRUCTURE

- Accountability Structures
- Workplace & Environment
- Policies & Governance
- Budget

CULTURE

- Workforce Experience
- Communication & Interaction
- Meetings & Gatherings
- Mission & Values

PEOPLE

- Role Allocation & Planning
- Recruiting
- Hiring
- Learning & Development
- Performance Management
- Compensation & Mobility
- Retention & Turnover

Assess which stage of DEI development your organization is at today...

Are you in the early days of building awareness or have you begun to gain some momentum? Are you working to make structural and systemic changes or have you integrated DEI deeply across your organization?

Find out by taking our DEI Strategy Assessment here:

<https://www.theaciacompany.com/dei-strategy-assessment>

GETTING STARTED

After you have reviewed the full timeline and have determined the resources you can dedicate toward the process, map out a draft of your strategic plan process timeline using the questions and table below. You can revisit our suggested timeline on page 36 of the guidebook.

How many months are available for your timeline?		How often can my team meet (multiple times per week, 1x per week, 1x every 2 weeks, 1x month, 1x quarter, once)?	
Will it be In-person or virtual or both?		Will it be facilitated internally by an employee or will you bring in an external facilitator?	

MONTH	1	2	3	4	5	6
Phase 1: Kickoff						
Phase 2: Current State						
Phase 3: Vision & Strategic Priorities						
Phase 4: Implementation & Project Planning						

MONTH	7	8	9	10	11	12
Phase 4: Implementation & Project Planning						
Phase 5: Publish & Communicate						
Phase 6: Wrap-up						

THE BIG PICTURE

1

Building trust cannot be overlooked when engaging people with the organization's mission and goals. This can partly be achieved by utilizing a co-creation process where everyone can share and participate.

2

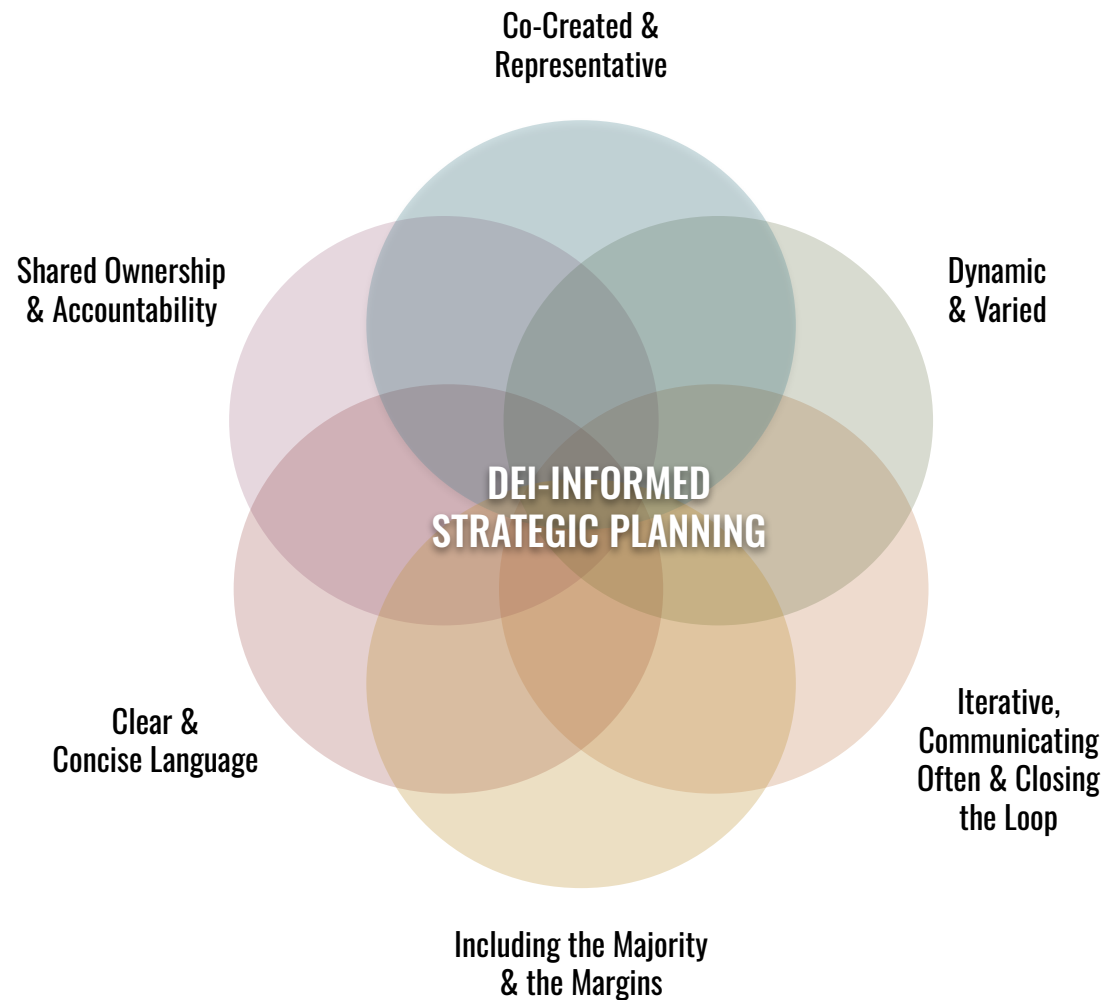
Any strategy is only as strong as its foundation. That foundation is an honest picture of the organization's current state, informed by unbiased data, depth of perspectives, and a representative group of stakeholders.

3

People must know and connect with the vision to be part of it. The role of leadership is to make this vision clear and compelling.

4

Perfectionism isn't the goal, it's about finding the way that works for your org that will create meaningful impact. At the end of the day, it's about reviewing your current process for gaps in equity, inclusion, and diversity and working to improve them. This will help organizations have more effective strategic plans that help to achieve their mission and vision with integrity.





Connect With Us

 [@The Acacia Company](https://www.linkedin.com/company/theacaciacompany)

 [@theacaciacompany](https://www.instagram.com/theacaciacompany)

 [@TheAcaciaCompany](https://www.facebook.com/TheAcaciaCompany)