Creating your Strategic Plan

00:00

I want you to think about what your role is in DEI, because people will invest in you and your projects and your work based on how much you invest in yourself. So be really realistic in evaluating the scope of your role and this initiative and the resources that you're going to need to support it. Whether you're in a decision making role or not, whether you're in a leadership role or not. This is about going back to the table and really opening up a conversation about what you believe are the resources and the considerations and all the factors that are involved with planning. Better to have a contained and well run effort, then a huge initiative with inadequate resources. So really think about what your role is, and taking a leadership stance on regardless of where you are in your organization.

00:50

So let's get started with the framework and what that looks like. I know from the survey, we had asked a bunch of questions on the types of initiatives and things that you wanted to focus on, I wanted to, before we go into our breakouts, I wanted to really level set or clarify what the difference is between when we talk about an initiative or results, because this is going to be really key to securing buy-in. So let's take as an example, workforce diversity pretty much across the board, and for those who completed the survey that came across pretty crystal clear. So we're going to do a breakout session on workforce diversity. When you think about workforce diversity, that's the initiative, right? When you think about the things that have to happen underneath that initiative. For example, recruitment strategies and awareness training. The theme or the initiative is workforce diversity, but the results, the objective are recruitment strategies and awareness training. So when you're going in and you're selling your plan, you're not talking you're not pie in the sky, right? 60,000 feet up, you're on the ground. So I really want to make sure we land the plane as a result of attending today and really get clear on what is it that we're going to see in 3, 6, 9 months to a year, right? What are the results of doing this underneath each of those initiatives, and taking it even further. Okay, so the results are what you're going to sell. But you can't sell a result unless you can measure the results. So going one more level deep in, more deep dive, as an example Awareness training. In your pitch, in your plan in your progress report, maybe there's a line item that says you know what, in order to achieve the awareness training that we're looking for, we would like to establish to PD two professional development opportunities every single month, that offer personal and professional growth and networking, for example, so that staff feels that they are part of a diverse and inclusive environment. That's just an example of what I mean by a metric. So that goes on your plan, the results, and the metric is how you sell it.

03:03

Now, one more level deep in. What's the action item? Sounds great, right? We have two key opportunities scheduled on the calendar. But what is the action item? What do we have to do? And this is where you walk away with tangible implementable action items and activities that you want to think about and how that fits into your plan. So as an example, if you're going to create and schedule PD opportunities twice a month, well, you probably need to review the HR budget, for example, you might

want to save some money and establish a train the trainer type of program. I do leadership training, for example. And now more than ever, I see a lot of companies, used to be they have people like me, and to do 30 people at a time consecutively. Now the budget is a little tighter. So having one person come in for one session, and then having them take that away and disseminate it throughout the organization is now a shift and I'm seeing maybe scheduling some sort of events that builds camaraderie, such as this, a forum like today.

04:03
So when we're thinking about I want you to really set the framework of how you're communicating your plan and not be so high up, we want to make sure you land the plane. We want to talk about measurable results, and then an action item of how you're proposing for that result to happen. So that's really the framework.

04:24
Now as an example, and then of course setting your dates there. As an example, this is just a template of what a plan, which could also function as a progress report. As a progress report. You have your objective, you have your action item you have your date and your progress where that is. But when you're communicating that and keeping it really simple. I might be dating myself that old adage of KISS: keep it simple, stupid. That was a common term used in leadership, which really means when you're trying to communicate something you don't want to be all over the place, you want to be really clear and succinct. So when you're talking about your objective, you're not really talking about your objective, you're talking about the results, and you're putting a metric to that. And then you're speaking to how that will be done.

05:12
For today's session for a breakout room, when you're taking notes, don't worry about the how, don't worry about all the considerations. I know a lot of that feedback came back from the survey, all I want you to do is to make this really successful for you and to have some tangible items to walk away with, I'd like you to write down what it is that you're trying to achieve as a result of that initiative. And how you propose or how you feel like it should be enacted how that would be accomplished.

05:44
Okay, so let's go back to that example, the initiative is workforce diversity, but that's not what you're going to sell. The result is awareness training, as an example. And the measure of that result is establishing those two professional development opportunities, how are you going to do it? And those three items right there, HR budget, establishing a rollout program, scheduling events. Things like that. All right. Does anyone have any questions so far, about how that would be laid out? And this really applies to anything, right? It's not just on a DEI program? Is it securing buy in, and I wanted to spend a couple of minutes on that, so that you can communicate it effectively, and really own what it is that you're proposing and being really good to yourself and setting realistic expectations, not pie in the sky.

06:32
The purpose of today's program, is to land the plane and come back with some tangible activities and action items that you feel would be realistic in the next, six to nine months. All right, when you're

starting any program, you have to start with the why right? What is the mission? The objectives are the what? And the action items are the how. So today, we're going to focus on what it is we're trying to achieve? What are the results, how we're going to measure it? And what are some thoughts around the implementation around that. Planning is great, but nothing happens until we get some clear cut actions out of that.

07:12

Now, let's look into high level, what are some major components of a DEI plan, and you will receive a copy of this presentation. So feel free to take screenshots if you like, but you will be getting this. These are the major themes of a DEI framework. You have your mission at the top you have your governance, even a diverse board, right? I know a lot of you said I want to create more diversity in my board that would go on to governance and policies. You have a whole arm of your plan, which is gathering the research the quantifiable and the qualitative metrics, right?And analyzing that and monitoring that to see if those things really are appearing, as you're implementing different things to create more inclusion, for example.

07:58

You also have workforce diversity, I know that came up very clear in the survey, Branding, right marketing and branding a big part of DEI and what we just discussed a few minutes ago. How are we going to sell it? And how are you going to create the atmosphere, that you are a diverse and inclusive organization, to the outside world as well as inclusive internally.

08:21

Social Responsibility, another major theme in your DEIplan, you can't talk about social responsibility if you don't talk about community impact. And I know that that was also something that came up a few times in the survey. So we're going to be deep diving into that as well.

08:37

And lastly, supplier diversity. This particular topic did not come up in any of the survey results, we're not going to be digging into it but it is typically a part of a DEI program. I can tell you on the other side, I am a diverse vendor, In Our Shoes is a woman owned business. And so I know working with you lots of large organizations big and small. supplier diversity is a big consideration. So if it's not for you, then you don't have to put that on your program, but it typically is part of the wider program.

09:13

All right. Now as an example, when you're going into your breakout groups, let's just talk about some of the ways we're going to be communicating and getting this down on paper for you to really wrap your head around it. So workforce diversity, that's the higher level initiative. Right, we talked about the results of getting more diverse staff, recruiting strategies. Well, the recruiting strategy is one of the results but what would be the way you measure that? Well, maybe your metric, your bar for success is getting for example 33% of staff of color, 50% of women at every level in the organization not just at the administrative level. maybe middle level or supervisor decision making ability. When we talk about community impact under social responsibility, right? Maybe a metric is, for example, investing 1 million

in educating minorities, youth victims of domestic violence. So what are the measurable results underneath that initiative.

10:23
So this is the format, if we can follow wwhen you're meeting with your breakout groups, and then also i'm going to be jumping in and listening and taking notes as well. My hope is to take the template plan that I have, and also enhance that based on the feedback that's coming out from the breakout groups so that we have a true collaborative plan that you can take away with after today's session.

10:47
Okay, let's briefly just touch on mind mapping, if you haven't heard of mind mapping, it's a very powerful strategic approach of blowing out and really creating a strategic plan. It's based on how the brain works, which is taking a central thought and then branching off of from there, considering all of the things that have to work rationally based on that central core theme. So as an example of a mind map, and there are lots of free tools that do mind mapping, mind meister is one of them. This really does help because it sort of blows out all of the different things that you would consider around a specific program. So this was a mind map based on an organization that really wanted to get on paper, how they would celebrate diversity, for example. And so these are all the things that came out of that. And as you can imagine, from that top level set of branches, you would blow out from there. And even go a little bit further on. Well, how would that look? What would that look like? And how would we do that?

11:50
So if you're not familiar with mind mapping, and you're open to new and different ways, in terms of really forming a blueprint in your mind around this program, it's basically doing a brain dump, you start with the big ticket items of what you would want to really consider, you group them into other categories. So in terms of DEI, the major categories, the major branches would be those seven themes that introduced earlier, and then you branch out from there. For purposes of today, we're going to have three breakout sessions. So we're going to have three major categories. And if this supports you, and you feel like it works, then I invite you to try it as well. Typically, as a result of mind mapping, you take that expanded line of thinking and then it eventually becomes a physical plan, where all of those branches actually become line items on a plan and progress report. And there you're attaching time and costs and you're going down, you're itemizing everything.

12:47
But again, the plan has to sell the results. It has to sell the results and it has to be measurable around those results.

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