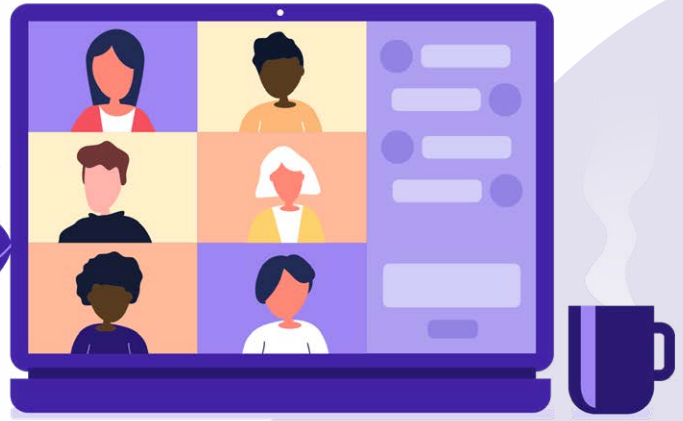


GUIDE TO DEVELOPING A STRATEGIC DIVERSITY, EQUITY AND INCLUSION PLAN



A strategic diversity, equity and inclusion (DE&I) management plan can help an organization make the most of its diversity by creating an inclusive, equitable and sustainable culture and work environment. Workplace diversity is the collective mixture of differences and similarities that include individual and organizational characteristics, values, beliefs, experiences, backgrounds, preferences and behaviors.

To determine the need to create or revise an existing DE&I plan, review the following:

General Questions to Consider

- If we already have a strategic DE&I Plan, what are the key elements?
- Do we need a strategic DE&I plan?
- What are our diversity objectives and goals?
- Who within the organization will benefit from a strategic DE&I plan?
- What is our timeline to develop, implement and evaluate our strategic DE&I plan?
- Who would be involved in our strategic DE&I plan?

Recommended Action Steps

- If there is a plan in place, review the components below to evaluate its effectiveness.
- Conduct a gap analysis to understand your specific areas of focus.
- Assess interest level in a strategic DE&I plan and identify individuals with the greatest and least level of interest. Include individuals with the greatest level of interest and educate those with the least level of interest.
- Identify and evaluate goals and outcomes.
- Develop education for those identified as key stakeholders.

When developing a plan, the following components should be aligned to work with an organization's overall strategy. SHRM members may access sample questions to consider and/or action steps to take for each component below [here](#).

- Business Case for DE&I.** A successful strategic DE&I management plan is one that is relevant to an organization's mission, vision and business objectives.
- Commitment from the Top.** Those who will eventually implement the plan must have the backing and active involvement of the organization's leadership, including the CEO, board of directors, executive team, etc.
- Vision, Mission and Strategy.** This is the "where, what and how" of a strategic DE&I management plan. Any large change initiative that is not grounded by a clear vision, mission and strategy is likely to lose focus.
- DE&I Recruitment and Sourcing.** DE&I recruitment means companies recruit individuals with a collective mixture of differences and similarities that include individual characteristics, values and beliefs, and experiences and backgrounds.
- Employee Retention.** Retention is often framed as a key economic driver for DE&I efforts because it costs an organization a significant dollar amount when an existing employee must be replaced.
- Training and Development.** Training and development includes activities designed and implemented to ensure that all employees are equipped to create a work environment that is diverse, equitable and inclusive.
- Onboarding.** This is one of the first opportunities to make a new employee to an organization or location feel welcome and comfortable sooner rather than later.
- Communication.** DE&I communication should include a strong commitment by the organization to a diverse, equitable and inclusive workforce and to serving a diverse customer base.
- Marketing, Advertising and Branding.** Many organizations have discovered that the diversity of their staff and the equitability and inclusiveness of their work environment can be used as differentiators in the marketplace and can become a competitive advantage.
- Leveraging Employee Diversity.** This refers to building and then making use of a workforce that is more diverse and more equitable and inclusive than it was before plan implementation began.
- Strategic Alliances and Partnerships.** These are formal relationships between two or more parties who remain independent while working together to achieve a specific goal or to enhance an element of the DE&I strategy.
- Corporate Social Responsibility.** Corporate social responsibility (CSR) and DE&I can be thought of as overlapping circles; the two functions share many of the same goals, and oftentimes one activity or effort will meet the needs of both functions.
- Customer/Member Experience.** This is the experience internal and external customers have when they enter a place of business or interact with employees, products or services.
- Supplier/Vendor Diversity.** An integral part of any organization's DE&I program is to ensure that it promotes DE&I outside of the company by doing business with a variety of suppliers and vendors.
- Measurement and Accountability.** This refers to the tools used to determine if DE&I efforts have achieved the desired results, and if not, who will be responsible for correcting the methodology so those desired results can be achieved.