

## DEI Strategy Plan

**How to use this document:** This document is intended to be used as an Excel document but is also provided in .pdf format. The Excel tabs correspond to specific goals where additional support for the linked goal is provided.

**Instructions:** Typically HR maintains the DEI Strategy Plan document and provides regular updates to executive leadership. This sample plan is based on the Sample DEI Policy provided as part of the DEI Toolkit. Obviously, dates and goals will need to be adjusted based on your organization's specific needs and timing.

**Color coding:** Anything that has potential issues or roadblocks should be shaded in yellow and explained in Notes column. Anything shaded in red indicates that the due date will be missed and explained in the Notes column. Anything shaded in green means that it is on schedule. When a due date has been met, shade the date in green. If due date has been missed, shade the date in red. Any other notes pertaining to the goal should be added as necessary. Phase 2 milestones should be entered as separate goals when Phase 1 is complete.

Goals	Milestones				Due Date	Owner	Notes
Align DEI vision with organizational vision	Place on Executive Leader Meeting agenda	15-30 minute Exec Leader assignment	Implement: Incorporate into DEI Policy		4/30/2025	HR Leader	One sentence that should be inspirational and aspirational
Distribute policy to all employees (Note: sample DEI Policy provided as separate Word/.pdf document)	Policy distributed on 5/1/2025			Phase 2: Schedule policy annual review	5/1/2025	HR Leader	First time policy is issued and for subsequent revisions, it will be distributed to all employees. Should also be distributed as part of New Hire Orientation.
Recruitment DEI Training for hiring managers and supervisors	Develop or purchase training	Deploy training		Phase 2: Measure training effectiveness	5/2/2025	HR Leader	
Team orientation for new employees	Introduce new employee to team on Day 1 of employment	Assign buddy or go-to person to shadow and advise new employee	Check in with new employee on a weekly basis to determine if they need assistance, clarification, etc., (this is critical for first 30 days)		TBD	Dept heads	Buddy or go-to person for shadowing purposes may not be available for all departments and/or positions. Department needs to come up with alternative approach for those instances.
Feedback loop for new employees	Create questions for Days 7, 14 and 30	Have new employee answer questions through online survey or paper format			Days 7, 14, and 30	HR	
All hands meeting to launch commitment to DEI	Schedule event	Create presentation	Deliver		TBD	HR	On hold because of COVID
Inclusive employee engagement (supports inclusive workplace culture and employee retention)	Create and deploy survey to determine current culture climate by 5/15/2025	Summarize survey results and provide to executive leaders	Provide follow-up and next steps to employees	Phase 2: Add next steps from survey to DEI Strategy Document	6/15/2025	HR	Ideally, the surveys should be conducted in such a way as to allow employees anonymity in their responses.
Create DEI Team to promote DEI culture and find solutions to DEI challenges	Create diverse DEI team with representatives from each department (approximately 7-10 employees)	Schedule monthly meetings	Solicit the team for solutions to survey results	Phase 2: Rotate team membership on an annual basis	6/16/2025	HR facilitator	Team should include a good mix of leaders and front-line workers as well as culturally diverse.

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Equitable promotion opportunities	Review promotions granted over last 12 months	Complete blind mapping for review with senior leadership	Provide possible next steps based on review of data	Possible Phase 2: If promotions were not equitable, provide training to managers and supervisors on how to achieve equitable hiring practices	7/1/2025	HR	
Leadership integration of DEI principles	Commitment statement from all leadership employees			Phase 2: Review commitment statements during leadership performance evaluations to determine if met	7/2/2025	HR Facilitator	The commitment statement can be two to three sentences on how the leader will incorporate DEI principles into how they run their operation
Equitable employee development opportunities	All performance plans include employee development plans				7/3/2025	Supervisors	As part of performance management process, every employee shall have an employee development plan that shall considering the employee's individual needs for professional growth.