

DEI Strategic Planning: Environmental Scan

Contents

Section 1: Why DEI?	2
Discussion Questions	2
Section 2: Stakeholder Identification.....	3
Section 3: Stakeholder Analysis.....	4
Section 4: Current DEI Snapshot.....	5
Discussion Questions	5
Section 5: Articulation of DEI Goals	6
Discussion Questions	7
Section 6: Service Area External DEI Strategy	8
Discussion Questions	8

A diversity, equity, and inclusion (DEI) strategy is a comprehensive plan created by an organization to foster a culture of diversity, equity, and inclusion both internally and externally.

This guide is designed to highlight areas for improvement and propose methods for developing a successful DEI strategy within your organization. It provides a chance to assess the advantages of a DEI strategy for your organization, recognize key stakeholders and supporters, evaluate support levels, and start outlining your organization's DEI objectives.

Section 1: Why DEI?

Please write your organization's current mission, vision, and values.

Mission	
Vision	
Values	

Discussion Questions

1. How do DEI philosophies and practices expand your organization's mission, vision, and values?
2. What are the key motivations for integrating a DEI strategy in your organization?
3. Is this progression toward DEI an organic development within your organization, or is your organization more motivated by external stakeholders, such as funders, necessitating DEI initiatives? How will your organization sustain its commitment to its DEI strategy if the language employed in the initiatives encounters legal scrutiny?

Notes:

Section 2: Stakeholder Identification

Start identifying the essential members of your DEI team. Engage in a discussion with a colleague from your organization and jot down notes on the following points:

1. Determine the core team members responsible for managing and executing the DEI strategy. What skills and experience should they have? What skills are they open to acquiring? Highlight areas where your DEI team may require external support (i.e., areas of expertise not currently available within your organization).
2. Who are the primary stakeholders within your organization crucial for supporting DEI initiatives? Who are other champions, leaders, and allies who can move the strategic plan along?
3. What tools or resources does your organization need to kickstart the implementation of a DEI strategy?
4. How do you plan to address and handle any resistance or opposition that may arise?

Notes:

Section 3: Stakeholder Analysis

Your goal is to assemble a diverse set of key stakeholders and thought/opinion leaders (diverse in role within the organization, locus of control, identity characteristics, etc.). Consider the following questions to help determine who should be included:

- Who will represent the client and employee voices?
- Who are the thought and opinion leaders within the organization and externally?
- Are there long-standing groups, such as board members, that must be engaged?
- How can you engage employees and community members?
- What will compel these stakeholders to work with you? What is in it for them?
- Identify initiatives stakeholders have participated in that demonstrate openness to diversity and inclusion (e.g., participation in diversity training, memberships in professional organizations for underrepresented groups).

#	Stakeholder	Interest in Project	Engagement Readiness	Impact / Influence	Needed Contribution	Stakeholder Engagement Strategy	Person Responsible for Recruitment
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							

Adapted from the Association of American Medical Colleges *Diversity and Inclusion Strategic Plan: Tools and Templates*, [Template: Stakeholder Identification](#). © 2016 AAMC.

DEI Strategic Planning: Environmental Scan

Section 4: Current DEI Snapshot

Please provide three themes or keywords that best represent your organization’s current DEI commitments in the following areas:

- Recruitment and Retention
- Culture and Belonging
- Policy and Procedure
- End-User Accessibility
- Training and Education

If your organization has not yet established any DEI commitments, please move on to section 5.

#	Recruitment and Retention	Culture and Belonging	Policy and Procedure	End-User Accessibility	Training and Education
1.					
2.					
3.					

Discussion Questions

1. How does your organization gauge success regarding its DEI commitments?
2. Have you had to adjust goals or strategies as you implement these commitments?
3. Is your organization agile in making necessary adaptations to the initial strategy?

Notes:

Section 5: Articulation of DEI Goals

Please set one SMART DEI goal for each of the following areas in your organization. If your organization has existing DEI goals, think about where you can add new commitments or how you can adjust your current ones.

Example: *Our organization plans to develop an exit survey for employees who have been terminated, laid off, or voluntarily left to pinpoint and analyze trends that impact employee retention within our company by the end of Quarter 3 (September). The survey will be distributed to all ex-employees from fiscal years 2019–2023 and integrated into off-boarding processes starting in Quarter 4. We aim for a response rate of 65–85 percent within a two-month time frame.*

1. Recruitment and Retention

2. Culture and Belonging

3. Policy and Procedure

4. End-User Accessibility

5. Training and Education

DEI Strategic Planning: Environmental Scan

Discussion Questions

1. How do your DEI goals align with your organization's mission, vision, and values?
2. What challenges do you foresee in executing these strategies?
3. How do you intend to secure support from leadership, employees, and human resources for these DEI goals within your organization?
4. How will these goals improve your products, services, and client relationships?
5. How will you collect data to measure success?
6. What tools will you use to evaluate areas of improvement?

Notes:

Developing a DEI Strategy | July 31, 2024

Advocates for Human Potential, Inc., DEI Department
Shekhiynah Larks, DEI Manager

Adapted from:

Association of American Medical Colleges *Diversity and Inclusion Strategic Plan: Tools and Templates*, © 2016 AAMC.
California Workforce Development *Board Ready or Equity in Workplace Development: Racial Readiness Assessment*, © 2020
Race Forward

Section 6: Service Area External DEI Strategy

Consider the following questions as a foundation to evaluate the alignment of your internal DEI goals with your external DEI strategy.

Discussion Questions

1. Does your organization gather demographic data? If so, what specific information is collected?
2. Are the demographics of your employees consistent with those of your clients?
3. Do the demographics of your clients match those of your service area?
4. Does your organization utilize surveys to evaluate accomplishments and pinpoint areas for enhancement in client satisfaction?