

Change Team DEI Development Plan Template

A written plan of action is essential for individuals or teams working to increase diversity, equity and inclusion (DEI). DEI team workplans or development plans bring clarity to expectations, enrich feedback and review processes, and help align each team member’s tasks with the DEI team goals. TREC recommends using the [SMARTIE framework offered by the Management Center](#) to create clear and effective DEI goals. Once your goals are written, create a work plan using this sample DEI Development plan template to track activity and report on progress. Sample content illustrates the purpose of each column. You can add or remove columns and tables as needed.

(Organization Name) (20XX) DEI Development Plan

Core Priorities or Goals

- I. Training and Development – establish internal learning strategies for staff and board
- II. Infrastructure – establish internal mechanisms and processes to implement, monitor, and evaluate the work
- III. Human Resources – apply DEI lens to HR program policies and procedures

I. Training and Development

| Priority | Due Date | Who | Tasks | Feedback/Inputs | Success Indicators | Status |
|----------|----------|-------------|---|---|--|--|
| 1 | TBD | Change Team | Development of training and development plan <ul style="list-style-type: none"> • Watch TREC DEI webinars • Identify top 1-2 training needs • Schedule trainings | <ul style="list-style-type: none"> • Training Evaluation • Staff feedback | <ul style="list-style-type: none"> • Staff understand basic definition and application of diversity, equity, inclusion, and belonging • Increased open communication of inequity in the environmental field and at the organization. | <ul style="list-style-type: none"> • Active |
| 2 | TBD | | | | | |

II. Infrastructure

| Priority | Due Date | Who | Task | Feedback/Inputs | Success Indicators | Status |
|----------|----------|--------------------|---|---|--|--|
| 1 | TBD | ED and Change Team | <ul style="list-style-type: none"> Change team Orientation Draft and finalize Change Team work plan | <ul style="list-style-type: none"> Orientation deck/note Decision Dashboard | <ul style="list-style-type: none"> Change Team work plan is complete and posted on SharePoint | <ul style="list-style-type: none"> Active |
| 2 | TBD | | | | | |

III. Human Resources

| Priority | Due Date | Who | Task | Feedback/Input | Success Indicators | Status |
|----------|----------|--------------------|--|--|---|--|
| 1 | TBD | Change team/HR rep | <ul style="list-style-type: none"> Decide on focus (recruitment, retention, employee/performance management, discrimination policy) Research DEI audit tools Identify tool to use Conduct audit Draft recommendations and timeline for changes Present to leadership | <ul style="list-style-type: none"> Audit tool Audit report | <ul style="list-style-type: none"> TBD | <ul style="list-style-type: none"> |
| 2 | TBD | | | <ul style="list-style-type: none"> | <ul style="list-style-type: none"> | <ul style="list-style-type: none"> |