

Strategy Screen for Diversity, Equity, and Inclusion Planning: SOAR

Time required for this activity: 45 mins-3 hours

Is your team struggling through decision making paralysis, eddying in debates that erode trust and communication, or unhelpfully comparing different experiences of marginalization in ways that derail initiatives to support some groups? Is this particularly frustrating because you have clearly articulated values for diversity, equity, and inclusion, yet you just can't seem to move forward into action? Developing concrete plans and determining clear pathways for DEI can feel particularly challenging, since prioritizing some needs, constituencies, and concerns over others can feel unequitable or in contradiction to the core values of DEI. Yet moving responsibly forward with accountability requires your organization to make strategic choices in order to develop pathways, track progress, and evolve new ways of doing and being over time.

A **strategy screen** is a list of criteria against which you can test various strategic options, particularly when **navigating crises, opportunities, growth, or change**. Strategy screens help you **apply your values** and can provide **clear rationale** so that all staff members feel better equipped to either make or support decisions that align with your organization's principles, mission, identity, and goals. A strategy screen can be particularly useful to clarify your DEI priorities and scope in a large field of possible activities.

One of the primary objectives of a DEI Strategy Screen is to help guide you into identifying key groups or constituencies that your organization wants to center in its DEI efforts—either ongoingly, or for a strategic period of time until responsible integration into your practices and culture is accomplished. Centering does not mean other groups or concerns are excluded, but that robust resources and care are invested to ensure the most thoughtfully inclusive and equitable practices for your priority group(s). By using a DEI Strategy Screen to determine these key groups, your organization will have coherent internal rationale for its choices. Over time, you may find that things evolve and you may shift focus to other constituencies or group needs; however, your choices will be strategic and rooted in your principles rather than reactive or ill-considered. Because **equity requires thoughtfully individualized approaches to various constituent groups' needs**, identifying key groups will help your DEI work be more responsible and successful over time.

The following prompts can be used to help you evolve your own DEI strategy screen to inform your decision making and planning for a variety of DEI-related projects, including:

- A DEI Statement
- Strategic planning
- Annual work plans at the department or team level
- Developing new programs and initiatives
- Determining participation or leadership in campaigns
- Reevaluating partnerships and commitments
- Budget development

We recommend using the DEI Strategy Screen for group processes to clarify a shared vision or rationale for your choices. You can use this for individual or group decisions.

After completing these prompts, review the answers to distill them into 3-5 criteria, taking special care with the **responsibility** considerations.

It's helpful to phrase your criteria as questions you can reflectively apply to your decision-making process. Here's an example of 4 criteria that could emerge from a group using this process:

- How does this choice allow us to leverage our deep legal expertise and access to policy makers?
- How does this choice bring us closer to our vision for a healthy river system while unconditionally respecting Native rights and title?
- How does this choice help us center the needs of the migrant working families living in this area? How does this elevate their safety, rights, and humanity?
- Can we mitigate or address our internal obstacles for following through with this choice?

The time required for this activity can range from 45 minutes to 3 hours, depending on how much collective processing and discussion you choose to devote. Remember, the goal of these prompts is to help you to evolve some decision-making parameters for future choices—having unanimous agreement isn't required for this tool to be helpful, but noting the differences in opinion and finding some key alignments increases your collective ability to move your DEI efforts forward.

TREC'S DEI STRATEGY SCREEN: SOAR

When it comes to diversity, equity, and inclusion, reflect on your...

Strengths	What is your organization already good at when it comes to diversity, equity, and inclusion? Think broadly about your strengths, which may also include some intangible strengths, like attitudes and values. This list is not comprehensive but intended to support your brainstorming: • Attitude: will, capacity to learn from mistake, willingness to try, persistence, humility, decisiveness, etc. • Time • Money • Experience with ____ • Relationships with ____ • Deep understanding of ____ • Access to ____ • People • Reputation
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Opportunities	Where are the places or moments you can maximize your work for DEI? Think about: • Access to influence • Timeliness • Emergent conditions that could be long lasting (i.e. growing minority constituency or new industry in a particular region) • Landscape analysis (no one else is doing this / we're leading this)
Obstacles	What could or is getting in your way of being effective in moving forward with DEI in this realm of work/decision? Focus on obstacles that are within your scope of control (ex: low staff understanding vs hostile political climate). Once you've created a list, order or rank them from hard stops for the work to mild inconveniences. These may also include intangible obstacles like attitude (e.g. either/or thinking, fear). These obstacles may include: • Lack of understanding for this issue • Low member or donor support • Intractable internal disagreement • No staff time or leadership for this
Aspirations	What are your hopes for this work? Your mission statement can inform this, but your aspirations may look like: • Land management that centers healthy ecosystems and community voices over industry needs • Native sovereignty, land, and title are respected and upheld • You become an anti-racist organization that serves as a role model for diversity, equity, and inclusion in the region • Staff are proud to work here and identify closely with the work of the organization
Responsibilities	This consideration requires you to have some familiarity and sensitivity to the <i>history of the region</i> in which you work. If historical context or understanding is low, refer to TREC's Conservation and Colonialism Timeline Activity in our DEI Toolkit: Foundations. What is the legacy of environmental, conservation, settlement, and development in the area? What groups have been most excluded, exploited, left out, or harmed? In what ways? After developing a list, consider 2-3 groups that you feel the organization should be especially sensitive to – because they have been historically most severely impacted or harmed and your work can have a broad impact on their experiences (Including health and recreation), opportunities, and future in the region.