Milestones for DEI Change Teams

Use this guide to assess and track the progress of cultural change initiatives that are guided by a DEI change team. It is organized in three common phases: the foundational phase, the experimentation phase, and the integration phase. In all three phases, it is critical to keep the staff and board informed of progress and to eliminate roadblocks. The Executive Director, senior leadership team, and Board of Directors must also sponsor and support in all phases.

This is not a linear change model. You may be making progress in several phases at one time. However, it can be used as a linear guide in the first cycle of development. This is commonly completed within the first 1-3 years.

The Foundational phase contains milestones that create the leadership, structure and governance for an effective change initiative. It also contains activities to create a DEI strategic plan.

The Experimentation phase contains milestones for implementing goals and sharing progress on the DEI strategic plan. Remember to notice and report on any organic or unplanned growth that is stimulated by the DEI initiative.

The Integration phase contains milestones that prove or demonstrate that the organization has changed and that it has the tools, culture, and leadership to continue integrating changes in the future.

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Foundational Phase
"Let's make a plan to change"

- Executive leaders verbalize their vision for the DEI Initiative and provide resources (time, money, human)
- Develop relationships with board members and staff who can support the change team goals
- Elevate organizational barriers or roadblocks to decision makers who can remove them
- Change Team Project Management — TREC Resource: Change Team Core Processes and Tools (Open link)
- Change Team Governance — TREC Resource: Change Team Core Processes and Tools (Open link)
- Develop an annual practice to gather feedback from staff about the change team's effort
- Gather Data about the current DEI needs and the history of DEI change at the organization (understand the current state)
- Create a DEI strategic Plan proposal and solicit feedback from staff and decision makers
- Define the Future: Create a DEI Strategic Plan based on the organizational needs

- The organizational Strategic Plan
- Interviews with Key Informants
- A cultural assessment or baseline assessment
- The mission and vision statement
- HR Info and Data
- The DEI Statement
- Industry Trends
- Organizational Policy Review

TIP
D.E.I. Needs or history can be gathered from the following sources

Experimentation Phase
"Let's Try to Change"

- Execute and track progress on goals owned by the change team
- Transfer ownership of goals to individual staff or program teams. E.g. HR changes are lead by the HR lead, not a change team member.
- Connect and collaborate with staff to track progress on the DEI strategic plan goals.
- Implement a peer learning program
- Convene staff to share DEI learning and progress - even if not on the strategic plan
- Elevate organizational barriers or roadblocks to decision makers who can remove them

Integration Phase
"This is how we do it now"

- Goals from the experimentation phase are integrated into the organization's norms.
- Staff and board find it easy to connect with the change team
- Develop an ongoing practice to collect organizational DEI needs and share it with the staff and board
- Celebration of progress is routine and inclusive.
- Staff who serve on the change team feel rewarded and supported.
- The change team does not have barriers for recruitment.
- Annually review and update the change team governance
- The change team has sufficient resources to support the staff with DEI strategic plan goals.
- Barriers to organizational inclusion are surfaced and addressed without detours.
- Develop networks and relationships with other change teams to amplify and share learnings.

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