

Creating a diversity, equity, and inclusion strategy

Toolkit for developing a strategy to enhance DEI in your organization

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Canadian Centre for Diversity and Inclusion
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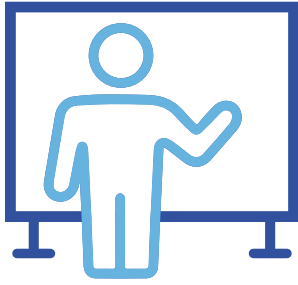
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Introduction



About this toolkit

In 2014, CCDI hosted a series of in-person Community of Practice Events in four cities across Canada: Vancouver, Edmonton, Calgary, and Toronto. Participants engaged in a group brainstorm and worked together on crafting the components of each section of a DEI strategy such that it would be easily customizable and applicable to all types of employers – large or small; public, non-profit, or private sector. These brainstorming sessions resulted in the first version of this toolkit, published in 2014.

This version, created in 2023-2024, has been updated with recent research and resources to bring fresh perspectives and insights into DEI strategy, as well as “in action” highlights from CCDI Employer Partners. This toolkit is organized into four sections:

- Getting started
- Gathering information
- Set goals and objectives
- Develop an implementation plan

Each section shares a list of actions to complete and concludes with reflection questions and helpful resources. Not all steps will be relevant or required for every organization. However, we encourage all teams to use this document as a starting point and suggest you use the table of contents to locate sections that most align with your organization’s needs. The information contained in this toolkit has also been summarized in a checklist format, which can be found in Appendix A.

**Please note that creating an effective DEI strategy may not follow a linear progression. Teams may find themselves moving forward and backward through the four sections of this toolkit as your team learns new information or circumstances change. Although the development process may take longer, embracing this dynamic process will allow your team to constantly improve your DEI strategy.*

A note on terminology

Throughout this toolkit we use the acronym DEI (diversity, equity, and inclusion). Your organization and others may use any number of acronyms including D&I (diversity and inclusion), EDI (equity, diversity, and inclusion), IDEA (inclusion, diversity, equity, and accessibility), and others. Your choice of acronym depends on your organization’s workforce demographics, geographical location, size, DEI maturity, and goals. In fact, the process of developing your strategy can help to determine your organization’s goals and the most appropriate acronym to describe them.

Purpose of the DEI strategy

The “Making the case for diversity, equity, inclusion” toolkit explained why organizations should prioritize diversity in the workplace. It highlighted the benefits that DEI brings to organizations to help create buy-in from leadership. This toolkit can be seen as the next step after creating that document. While your business case explained why you need to focus on DEI, your strategy document lays out how. This document can be seen as your organization’s roadmap to provide more explicit direction on how you are going to achieve that goal. As you build your DEI strategy, it is also important to keep your business case in mind as your organization’s rationale and overall DEI goals.



In action: Brampton Library

*If your organization is small, or if you are just beginning your DEI journey, your DEI strategy does not need to be a long, complex document. The **Brampton Library’s Inclusion, Diversity, Equity, and Accessibility (IDEA) Strategy** is simple but effectively communicates their approach and commitment to DEI as well as their key focus areas and goals.*

The purpose of a strategy document is to outline your overarching strategic goals as they relate to DEI and to provide more explicit direction on how you are going to achieve those goals. It is essential that you customize the verbiage, style and tone in a way that will resonate with your workplace. Study the style and format of the strategic planning documents that are already used in your organization. The more your DEI strategy document aligns with accepted and respected approaches, the more likely it will be accepted and implemented within your organization. It should be noted that creating the actual DEI strategy document is the final step in a relatively involved process. This cannot be done overnight, as developing an effective strategy requires significant research and preparation.



Helpful resources

Bilingual

- [Making the case for diversity, equity, and inclusion \(PDF\) / Plaidier en faveur de la diversité, de l'équité et de l'inclusion \(PDF\)](#), CCDI toolkit

English only

- [It’s \(past\) time to get strategic about DEI](#), McKinsey & Company
- [Seven Ways to Build a Truly Equitable DEI Strategy](#), RAND
- [The Five Stages of DEI Maturity](#), Harvard Business Review

French only

- [Pourquoi la diversité en entreprise est-elle si importante ?](#), Talinko
- [Les cinq étapes de la maturité de la diversité, équité et inclusion](#), Me&YouToo



Getting started

Create a DEI statement

A DEI statement, also called a DEI commitment statement, is a formal expression of a company's dedication to diversity, equity, and inclusion, outlining its commitments and actions in these areas. This statement isn't just for employees—it's a message to everyone, including customers and the community, about the organization's dedication to fostering an inclusive environment. An effective DEI statement clarifies the importance of DEI within the organization's existing vision, mission, and values. It also sets a common understanding of what diversity, equity, and inclusion mean to your team or organization.

Begin by thoroughly understanding your organization's mission, vision, and core values. This includes examining how these elements guide decision-making and shape the company's culture. This should be a collaborative effort; gather input from employees, leadership, and relevant parties to ensure that the DEI statement resonates with their understanding of the organization's mission, vision, and values. Analyze how diversity, equity, and inclusion contribute to achieving your mission and vision, and identify overlaps between DEI and broader organizational objectives. By continuously reinforcing the connection between DEI and the organization's core principles, your DEI statement can effectively align with and contribute to the overarching strategy.

Guidance on creating DEI-focused vision and mission statements can be found in [Appendix B](#).

Remember that a DEI statement is a living document. It should evolve with the organization's growth, changes in knowledge and understanding, and ongoing efforts towards inclusion in the workplace and community. Adapt and evolve the statement and associated actions to meet changing needs and goals.

Below are a few examples of organizational DEI statements from CCDI Employer Partners:

- **Canada Post:** Canada Post is committed to representing Canada's diversity. We aim to provide a safe, welcoming and inclusive workplace that embraces and celebrates our differences as Canadians. We value diversity as an essential part of who we are as a company, how we operate, and how we see our future. We believe that attracting, developing, and retaining people who reflect the diversity of Canada is essential to our success. It's a value reflecting what's important to the communities and customers we serve.¹
- **Halifax Public Libraries:** The Halifax Regional Library Board believes that a diverse and pluralistic society is central to our community's identity. Libraries have a responsibility to contribute to a culture that recognizes diversity and fosters social inclusion. Libraries strive to deliver inclusive service. Halifax Public Libraries recognizes and energetically affirms the dignity of those it serves, regardless of heritage, education, beliefs, race, income, religion, gender, age, sexual orientation, gender identity, physical or mental capabilities. Halifax Public Libraries understands that an acceptance of differences can place individual and collective values in conflict. The Library is committed to fostering an environment of understanding and respect. Halifax Public Libraries Acts to ensure that people can enjoy services free from any attempt by others to impose values, customs or beliefs. Halifax Public Libraries will make diversity and inclusion a priority in planning and decision making for staffing, collections, services and organizational change.
- **Homewood Health:** To accomplish Homewood Health's vision of "Improving Life as the Canadian leader in mental health and addiction services", we are committed to becoming a leader in diversity, equity and inclusion (DEI). We will accomplish this by providing patient and client-centered services incorporating DEI-informed programming, as we also strive to infuse an anti-oppressive, anti-colonial and anti-racist approach within our organization. We will become known as an employer of choice as we continue to build a workforce that is representative of the communities we serve and an inclusive culture that welcomes and empowers members of equity-deserving groups.
- **Ottawa-Carleton District School Board:** The Ottawa-Carleton District School Board is committed to equity of educational opportunities and outcomes. We know that diversity enriches the educational and employment experience of all. Our success rests in our ability to respect, appreciate and value people's differences. We champion an atmosphere of openness and respect which builds trust and enduring relationships with our communities. We lead by example.
- **Sodexo:** At Sodexo, we foster diversity, equity, and inclusion by respecting and understanding the needs of our clients, suppliers, consumers, and communities. We encourage our employees to bring their whole selves to work regardless of age, gender, nationality, culture or personal characteristics and we prioritize treating every individual with equal respect and fairness, recognizing their valuable contributions in shaping our identity. By living by our commitments and taking action against discrimination, and by inspiring other businesses and organizations to join the movement, we can contribute to a more open, fair and inclusive society.²



Reflection questions

- Does everyone on your team have the same understanding of what DEI means within your organization? How will you ensure everyone is on the same page?
- How do the organization's existing core values align with the principles of diversity, equity, and inclusion? In what ways can the DEI commitment statement reinforce and amplify those values?
- How can the statement reflect a commitment to addressing the unique challenges faced by individuals with intersecting identities?
- Were employees and relevant parties consulted during the development of the commitment statement? How can the organization demonstrate a collaborative approach to DEI by involving various perspectives?
- Are there plans for regular updates or communications to reinforce the commitment over time? Is there a mechanism for ongoing feedback to ensure the statement remains relevant and resonates with employees?



Helpful resources

Bilingual

- [How to Write a Commitment EDI Statement That Helps Shape Your Workplace Culture / Comment rédiger un énoncé d'engagement à l'égard de l'EDI qui aide à façonner votre culture en milieu de travail](#), Hire for Talent

English only

- [DEI Commitment Statement Guide \(PDF\)](#), Harvard Office for Equity, Diversity, Inclusion, and Belonging
- [How to Write a Diversity, Equity, and Inclusion \(DEI\) Statement](#), Visier

Gathering information

Assess your current state

Take the time to evaluate policies, processes, tools, accommodations and more. Consider who this serves and who it does not and make note of any patterns. It is crucial to be critical at this stage as this process may highlight areas of concern.

Current state assessment models

Several models exist for structuring your assessment, the most common being the SWOT analysis. When deciding on a model, look at each factor included and determine which is most relevant to your organization or industry. It may be helpful to use more than one model for a more detailed analysis in some cases. The table below outlines four common current state assessment models to consider, including a brief description, and the elements it focuses on. For more information on each model, click on the link in the first column.

NAME	DESCRIPTION	ELEMENTS
SWOT analysis	A framework for identifying and analyzing your organization's strengths, opportunities and threats.	<ul style="list-style-type: none">• Provide a comprehensive view of the organization• Help prioritize goals and objectives• Enhance decision-making
5C analysis	A marketing framework to analyze the environment in which a company operates. The 5Cs are Company, Collaborators, Customers, Competitors, and Context.	<ul style="list-style-type: none">• Determine organization's key drivers and provide insight about their function and relation• Help inform decisions about targeting audience and competitors
PESTLE analysis	A strategic framework to evaluate the environment in which a firm operates. The acronym stands for Political, Economic, Social, Technological, Environmental and Legal factors.	<ul style="list-style-type: none">• Accessible and easy to understand• Help anticipate future opportunities and threats
Porter's five forces	A model that identifies and analyzes competitive forces to determine an industry's weaknesses and strengths. The five forces are: Competition, potential of new entrants, power of suppliers, power of customers, and threat of substitute products.	<ul style="list-style-type: none">• Assess industry competition levels• Highlight strengths and weaknesses

Carry out an analysis of relevant parties^a

This analysis reviews all individuals and organizations involved or impacted by a DEI project or initiative. Within the analysis, you will identify groups or individuals that are connected to your organization or project and determine their interests, motivations, roles, importance, and impact.³ This analysis works well alongside or within the current state assessment to gauge risks and opportunities associated with these relevant parties.

The first step of this analysis is to create an extensive list of relevant parties. Keep it broad at first, as you can always reduce the list. Consider brainstorming with a larger team, taking advantage of the knowledge of more experienced team members, accessing historical organizational data, or looking at comparable past projects.⁴

Relevant parties may include:

- Investors
- Employees
- Leadership
- Customers/clients/members
- Suppliers/vendors/distributors
- Creditors
- Competitors
- Community members
- Governments/political parties/politicians
- Special interest or advocacy groups

Different identified parties will have varying levels of interest, influence, and potential impact, which are described below, with examples of each.

FACTOR	EXAMPLES
Interest relates to any overlap between the goals of the relevant party and the goals of the initiative.	<ul style="list-style-type: none"> ● Finances ● Values ● Legal rights ● Religion ● Politics ● Business ● Level of knowledge ● Demographics ● Ownership
Influence relates to the individual or group's ability to stop, change, or progress the initiative.	<ul style="list-style-type: none"> ● Reason for participation/role ● Level of authority in respect to the project or the organization ● Relationships between parties ● Who they might be influenced by ● Who they might influence ● Whether the party's needs are necessary to success^{5 6}
Impact is the extent to which satisfying a party's interests would positively or negatively impact the outcome.	<ul style="list-style-type: none"> ● Positive ● Negative ● High ● Low ● Unknown/uncertain⁷

^a This updated toolkit has removed the term "stakeholder" due to its colonial connotations. We have decided to use "relevant parties" to highlight the various groups involved in this process. For more information, see [Switching from Stakeholder](#) from Research Impact Canada and [Terminology in Indigenous content](#) from the Government of British Columbia.

Models for analyzing relevant parties

With the previous information in mind, you can prioritize each party and determine the appropriate level of communication, involvement, and care.⁸ Commonly used models include the [power interest grid](#) and the [salience model](#), but many other models exist and you should choose a model that best fits your organization and the types of involved parties.

Prioritizing relevant parties using these models allows you to build out your current state assessment to include the risks and opportunities presented by each individual or group in terms of their involvement. This analysis can also help you tailor your strategy to those parties who may need the most convincing and provide information that is most relevant to their interests. Understanding the interests, influence, and impact of relevant parties can be valuable in determining how your team should manage each individual or group throughout the initiative. Identifying the risks and opportunities presented by each party can help proactively manage the risks, take advantage of the opportunities, and ensure the success of your initiative.

Engage your workforce and community

One of the most effective ways to learn about the needs of your employees is through direct consultation. Your employees can tell you about their real-life experiences working within the organization and the barriers they face. Additionally, when your employees are involved in the development of your strategy, and can see themselves in the priorities and initiatives, they are more likely to buy-in to that strategy and remain engaged in the work.



In action: Sobeys

In 2023, Sobeys launched a "Discussion Lab" program that enables employees to share their experiences and perspectives on barriers to inclusion. The input they received helped the company to strengthen their DEI strategy.

Gather feedback from employees during the development of your strategy as well as at regular intervals after it has been implemented to ensure that your strategy is having a positive impact. Use focus groups or listening sessions as well as surveys or feedback forms to capture a range of information. Additionally, if your organization has employee resource groups or DEI committees, these groups should also be engaged in the strategy development process.⁹

Further, your community can also help you in your strategy development by providing nuanced perspectives and expertise. Consider involving community groups that represent dimensions of diversity that may not yet be present in your organization or establishing an advisory board or committee. Utilize the information gathered in your analysis of relevant parties to identify any group that can support your strategy development. Remember, however, that if you are involving equity-deserving groups there should be some method to compensate those involved for their time.

Reflect on your DEI statement

Each time you gather additional information, set new goals or action items, or revisit your DEI strategy, you should also reevaluate your DEI statement. For example, if you follow the sections of this toolkit sequentially, once you've completed a current state assessment and analysis of relevant parties, take a moment to consider if your initial DEI statement still makes sense.

There should be clear connections between the environment in which your organization operates and your DEI commitments and actions. Your analysis of relevant parties might also reveal additional insights that may impact your statement.



Reflection questions

- How does the existing organizational culture support or hinder diversity, equity, and inclusion? What are the existing barriers and challenges to DEI implementation?
- Who should be involved in DEI strategy development? How can you identify and engage individuals who represent various perspectives and experiences?
- What steps can be taken to create a safe and open space for dialogue? Are there platforms for anonymous feedback? Are there incentives or rewards that can encourage active participation?
- How can the organization collaborate with external organizations, community groups, or experts to gather diverse perspectives and insights? Are there existing partnerships that can be leveraged?
- How will the organization communicate the outcomes of the engagement process and the decisions made in developing the DEI strategy? What measures will be taken to ensure transparency and build trust?



Helpful resources

English only

- [A Point of View: Strategies for Engaging the Community in DEI, The Inclusion Solution](#)
- [Boost Your DEI by Embracing Community, Charity Village](#)
- [Diversity, Equity, & Inclusion: Assess Your Company's Current State \(PDF\), Trucking HR](#)
- [Diversity, Equity, and Inclusion \(DEI\) Organizational Assessment Tools: A Resource Guide \(PDF\), Institute for Economic and Racial Equity, Brandeis University](#)
- [Engaging in Your Community, Diversity, Equity & Inclusion, University of Michigan](#)
- [Inclusive Excellence Self-Guided Planning Toolkit, Harvard Office for Equity, Diversity, Inclusion, and Belonging](#)

French only

- [Comment réaliser un audit DEI au sein d'un bureau : Un guide complet, Empuls](#)
- [Guide pratique sur l'audit de l'égalité des sexes \(PDF\), Canadian Audit and Accountability Foundation](#)

Set goals and objectives

Identifying the company's objectives and setting DEI goals provides direction and avoids duplication of work. The clearer your organization's DEI goals are, the better everyone can collaborate to reach them.

There are three “layers” of goals that can make up your strategy: key focus areas, long-term objectives, and short-term goals. As you progress through the layers, your goals get smaller, leading eventually to actionable steps in your implementation plan.

Identify key focus areas

Your team may have many things you wish to achieve, but it would be unrealistic to expect to address them all immediately. Your key focus areas allow you to refine this list to the most important areas to your organization.¹⁰

These focus areas should stem from your organizational vision, mission, and values, as well as your DEI statement. As the name suggests, these areas must be focused. Avoid jargon or vague language that may create confusion among your team.¹¹

Examples of key focus areas from CCDI Employer Partners:

- **Canada Post:** Serve society and respond to social issues, movements and events¹²
- **Corus Entertainment:** Representing Diversity in Content¹³
- **Golf Canada:** A Safe, Inclusive & Aligned Sport System¹⁴
- **Maple Leaf Foods:** Drive Accountability to Represent the Communities We Serve¹⁵
- **Sobeys:** Strengthen our communities¹⁶

Define the long-term strategic objectives

As the name suggests, long-term strategic objectives should be high level objectives that will take several years to achieve—generally at least three years. Long-term strategic objectives answer the big picture question of what you must focus on to achieve your vision and should connect with each of your key focus areas. DRIVE is a useful initialism to help focus your long-term objectives. It helps your team set ambitious yet realistic goals.¹⁷

- **Directional:** Moves the organization toward the general intention of the vision statement.
- **Reasonable:** Practical and obtainable, not extreme or unrealistic.
- **Inspiring:** Provide management challenges and positive motivation.
- **Visible:** The goal is easy to visualize.
- **Eventual:** Will be fulfilled at a future date.

Below are some examples of long-term strategic objectives from CCDI Employer Partners:

- **Brampton Library:** Improve equitable outcomes for marginalized groups in hiring and advancement at all levels to better reflect community diversity.¹⁸
- **CBC/Radio-Canada:** Contribute to a barrier-free Canada by 2040 as per the Accessible Canada Act.¹⁹
- **EllisDon:** Address workplace bias through the continuous review and improvement of EllisDon practices and policies.²⁰
- **Maple Leaf Foods:** Educate and empower people leaders to set measurable goals, and champion and realize our company-wide commitments and goals.²¹

Determine short-term goals

Short-term goals work together to achieve your long-term strategic objectives and can generally be achieved within one to two years. The initialism SMART, similar to DRIVE, can be a useful tool for creating clear short-term objectives.²²

- **Specific:** The objective is precise.
- **Measurable:** There is a way to measure success.
- **Achievable:** The goal is realistic to achieve within the time constraint.
- **Relevant:** It can be categorized under one of the key focus areas.
- **Time-bound:** There is a clear deadline attached to the goal.

Below are some examples of specific short-term goals from CCDI Employer Partners:

- **EllisDon:** Establish 3 new partnerships that will diversify our talent pool from underrepresented groups.²³
- **Canada Post:** Launch EDI Newsletter to educate, raise awareness and foster dialogue and meaningful conversations about equity and diversity.²⁴
- **National Bank:** Make mentoring activities more accessible to our different employee segments.²⁵
- **WSIB Ontario:** Create a baseline with quantitative and qualitative data to track and report on our equity, diversity and inclusion efforts.²⁶



Reflection questions

- How do DEI goals align with the overall strategic vision and mission of the organization?
- How will the organization communicate DEI goals internally and externally?
- Have you sought input from employees, leadership, and other relevant parties in identifying DEI goals?
- How can you incorporate diverse perspectives and voices in the goal-setting process?
- What can you learn from other organizations that have successfully implemented DEI initiatives?



Helpful resources

English only

- [A Better Approach To Setting DEI Goals For Your Company](#), Forbes
- [How to Set DE&I Goals and Measure DE&I Success](#), Quantive
- [How to Set Dedicated DEI Goals for Your Business](#), Lever

French only

- [Bâtir son premier plan d'action en équité, diversité et inclusion](#), YouTube
- [Déployer une politique diversité et son plan d'actions](#), LinkedIn
- [Guide de rédaction d'un plan de diversité](#), Investissement Québec

Develop an implementation plan

An implementation plan, also called an action plan, is a detailed guideline outlining all the necessary steps to complete a project, including the relevant parties and deadlines. Creating a detailed implementation plan for your DEI strategy helps you to enact, communicate, and report on your progress. This will make it easier to identify necessary adjustments to continuously update your strategy.²⁷

Below, we address the following steps to developing an implementation plan.²⁸ Like the rest of this toolkit, these steps will not necessarily be followed sequentially. You might find you need to move back and forth between each step as you work toward your final action plan.

- Define action items.
- Clarify roles and responsibilities.
- Formulate progress indicators and timelines.
- Identify potential risks.
- Determine budget allocations and required resources.

Define action items

Action items are specific, measurable tasks designed to achieve the goals and objectives outlined in the broader DEI strategy. When developing action items, consider how your short-term goals work together to achieve your long-term objectives, and what needs to be achieved first.

Return to your key themes as well as the short-term and long-term goals and objectives identified in your strategy and break them down into smaller steps. Ensure that each task is actionable and something that can be completed or implemented within a specific timeframe. These tasks should also be measurable so their implementation can be tracked, and it should be clear who is responsible for each item.



In action: Hockey Canada

Hockey Canada's DEI action plan (PDF) specifies three primary focus areas, each comprising a set of overarching objectives followed by multiple action items. These action items work directly to achieve the organization's smaller goals that build into the larger objective. For example, one key focus area is "people". An objective under that focus area relates to leadership and accountability, which is broken down into three action items: "Identify EDI training plan for leadership team", "Incorporate EDI into Leadership Competency Model", and "Incorporate EDI KPIs into [performance] framework". Each action item then also lists its associated measures and timeline.

Clarify roles and responsibilities

While there may be one individual or team that is largely accountable for the DEI strategy, implementation should be woven through all parts of the organization. The structure of roles and responsibilities will vary depending on many factors, including organization size and industry, but there are a few ways, in general, to approach this task.

You may choose to define overall roles and responsibilities for each function, department, or job level. For example, the City of Vaughan specifies the roles of city council, staff, the city manager, deputy city manager, senior leadership team, and managers and supervisors.²⁹



In action: Sobeys

*Sobeys created a standalone document that outlines **the company's DEI governance structure (PDF)**, specifying roles and responsibilities at each level of the organization including board oversight (board of directors and human resources committees), management oversight (DEI council & management), enablers (initiative based working groups, functional teams, and inclusion teams), and partners (external organizations).*

Alternatively, you may decide to broadly define responsibilities like the Niagara Region, who's strategy specifies who is responsible for broad themes like "support and accountability" (corporate leadership and regional council), "implementation" (DEI staff, people leaders, etc.), and "input, advice, and support" (advisory committees and community members).³⁰

Finally, you may choose to identify responsibilities for each action item or for specific goals. For example, if the action item is to "expand recruitment efforts to reach equity deserving groups", you could specify the person or team that is primarily responsible for that action, in this case, likely the human resources (HR) team or HR manager.

Formulate performance indicators and timelines

Performance indicators and timelines form the structure of your implementation plan. Establishing clear performance indicators helps you to better define your goals and target your efforts, while setting realistic timelines helps each responsible group be accountable to your DEI goals while remaining motivated.

Establish key performance indicators

Your key performance indicators (KPIs) should directly relate to the broader objectives of your DEI strategy. For instance, if your goal is to improve diversity in leadership roles, KPIs might include metrics on promotions, hires, or retention rates of underrepresented groups in leadership positions. KPIs need to be quantifiable and measurable to track progress accurately, but ensure you're also measuring things like employee satisfaction, engagement, and perception of the organization's commitment to diversity. Surveys or feedback mechanisms can be valuable here.

Below are some examples of KPIs that you can tailor to your specific goals:

- **Employee engagement and satisfaction:** Include KPIs that measure employee satisfaction, engagement, and perception of the organization's commitment to diversity. Surveys or feedback mechanisms can be valuable here.
- **Retention and turnover rates:** Track turnover rates among different demographic groups. High turnover rates within certain groups may indicate issues with inclusion or support.
- **Progression and advancement:** Measure advancement opportunities and career progression among diverse employees. KPIs might include the percentage of diverse employees in leadership positions or their representation in talent pipelines.
- **Training and development:** Track participation and completion rates for diversity training programs. Also, monitor feedback and assessments from these programs to gauge their impact.
- **Community engagement and impact:** Assess the organization's impact on the wider community in terms of diversity initiatives. KPIs could involve partnerships with diverse organizations, sponsorships, or outreach programs.

Set implementation timelines

Determining timelines for DEI goals requires a strategic approach that considers the organization's current state, resources, and long-term objectives. Below are a few considerations or tips for determining timelines for your implementation plan:

- Begin by revisiting the current state of DEI within the organization and what was revealed in your analysis to identify areas that require immediate attention.
- Divide larger goals into manageable phases or milestones. Consider short-, mid-, and long-term objectives to create a roadmap for implementation.
- Assess the complexity of the initiatives required to achieve your goals. Consider the resources, including budget, staffing, and technology, needed for each phase and how that might impact your timeline.
- Involve relevant parties, including HR, leadership, DEI committees, and employees, in the timeline-setting process. Their input can offer diverse perspectives and build buy-in.
- Set realistic timelines by considering the organization's capacity or readiness for change. Rushing DEI initiatives may lead to superficial changes or significant pushback from a workforce that wasn't ready.
- Prioritize initiatives based on their impact and urgency. Sequence them in a way that allows for building momentum and addressing foundational elements before more complex goals.
- Remain flexible to adapt timelines as needed. Unexpected challenges or changes in the organizational landscape may require adjustments to the schedule.

Identify potential risks

As is the case with any type of initiative, there are risks that should be identified so a mitigation plan can be developed. Once again, revisit your current state analysis, as well as the goals, KPIs, and timelines you've set to find areas that hold risk. Then, you can create a mitigation plan that outlines steps that can be taken to prevent the risk or address it should it occur.

Here are some potential risks to get you started:

- Team/individual attitudes and potential resistance to change.
- Level of support or buy-in from leadership and key decision-makers.
- Availability of resources and budget.
- Relevant legislation and legal compliance.
- Measurement and tracking – data quality and confidentiality.
- Communication gaps.
- External factors like the socio-political climate or public perception of DEI.

Determine budget allocations and required resources

DEI strategies require resources. A financial assessment will identify the cost of implementing your DEI strategy. Given your budget, this will let you know if your team needs to scale back or if it has the budget to grow your projects.

DEI expenses vary and are dependent on numerous factors including an organization's size, industry, geographic location, and scope of DEI initiatives. Below are some examples of general budget categories.

- **Personnel expenses:** Costs associated with hiring and retaining employees with DEI expertise or to carry out DEI-specific functions, including salaries and benefits.
- **Training and education:** Costs related to the design, development, and delivery of DEI training programs or workshops. This can include the cost of external trainers, e-learning platforms, or fees to access DEI resources.
- **Recruitment and branding:** Fees for utilizing specific job boards, attending job fairs that target underrepresented groups, or tools that help reduce bias in the hiring process.
- **Employee resource groups or other specific initiatives:** Funding for ERG events, activities, resources, and initiatives that promote DEI within your organization.
- **Community partnerships:** Consultancy fees, membership fees, or remuneration for advisory committees.
- **Ongoing evaluation and measurement:** The cost of internal or external evaluation. Other expenses may include the cost of software, surveys, and data analysis tools.

To make meaningful progress on DEI initiatives, listen to what your DEI team needs and invest in resources to achieve your goals.³¹ Refer back to your analyses and assessments to look for gaps and determine how gaps will be addressed.

Aim for continuous improvement

A strategic plan is a living document that you should continually update.³² Dedicate time to analyze and discuss your metrics to understand what you did well with this strategic plan and identify how you will improve for next strategy.

Project management tools are useful to keep track of progress.³³ The RACI matrix is a simple but effective tool for defining project roles and responsibilities, providing a comprehensive chart of who is responsible, accountable, consulted, and informed every step of the way.³⁴



In action: Corus Entertainment

Corus Entertainment's DEI action plan is reviewed annually, and progress updates are provided quarterly. The organization's annual reviews provide a broad overview of initiatives undertaken that year, and the quarterly updates include the status and details of each action item.

- **Responsible:** The person who does the work to achieve the task. They have responsibility for getting the work done or decision made. As a rule, this is one person; examples might be a DEI manager or equity advisor, a human resources manager, people from communications, marketing, sales, or talent management, etc.
- **Accountable:** The person who is accountable for the correct and thorough completion of the task. This must be one person and is often the project executive or project sponsor. This is the role that 'Responsible' is accountable to and approves their work.
- **Consulted:** The people who provide information for the project and with whom there is two-way communication. This is usually several people, often subject matter experts.
- **Informed:** The people who are kept informed about progress and with whom there is one-way communication. These are people that are affected or impacted by the outcome of the tasks so need to be kept up to date.



Reflection questions

- What visible support and advocacy can leaders provide for the DEI strategy?
- What cultural changes are needed for the successful implementation of the strategy?
- How will the organization hold leaders and employees accountable for their contributions?
- What reporting mechanisms will be in place to communicate progress and challenges?
- What channels will be used to ensure transparency about initiatives and progress?
- How often will progress be assessed, and what mechanisms will be in place for ongoing evaluation?
- What resources are allocated for ongoing monitoring and evaluation of DEI initiatives?

- How can the organization adjust the budget based on the results and feedback received?
- How can you clearly communicate the purpose, goals, and benefits of the DEI strategy to ensure buy-in?



Helpful resources

Bilingual

- 7 steps to create an action plan for your business strategy / 7 étapes à suivre pour créer un plan d'action pour votre stratégie d'affaires, BDC
- Taking a Data-Based Approach to Diversity and Inclusion / Pour une approche de la diversité et de l'inclusion fondée sur les données, ADP

English only

- Budget Planning & Process, Diversity, Equity & Inclusion, University of Michigan
- Diversity and Inclusion Metrics: What and How to Measure, Harver
- Harnessing the Power of Data & KPIs to Advance Diversity, Equity & Inclusion in Organizations, Ascend
- Resources: Allocating Budget, People and Time, Diversity VC & Atomico
- What is an implementation plan? 6 steps to create one, asana

French only

- Bâtir son premier plan d'action en équité, diversité et inclusion [vidéo], Réseau Mentorat
- Comment gérer, promouvoir et mesurer la diversité en entreprise ?, Recrutee blog
- Comment mesurer la diversité et l'inclusion dans votre entreprise ?, Manageria
- Guide de rédaction d'un plan de diversité, Investissement Québec
- L'analyse de données au service d'une approche DEI stratégique, KPMG

Conclusion

We've developed toolkits for developing both the business case and strategy for diversity, equity, and inclusion because we believe that they are both critical components of your organization's DEI journey.

Developing a DEI strategy requires thoughtful planning, ongoing commitment, and active engagement from all relevant parties. Your DEI strategy will provide a roadmap for everyone in your organization to understand what needs to be done to help you move toward becoming a more inclusive organization. It is our hope that organizations use this toolkit as a foundation for developing and refining their DEI strategies, fostering an environment where every individual feels valued, heard, and empowered to contribute their unique talents and perspectives.

What's next?

The success of a DEI strategy lies not only in its formulation but in its implementation and continuous improvement. To stay updated on best practices, continue to educate yourself by reading articles and attending events.

For additional support, [view our other toolkits](#) to learn more ways to transform your organization's DEI initiatives.

Appendix A – Checklist to support the development of a DEI strategy

This checklist is intended as a tool to support your team as you create your DEI strategy. Consider the following questions to guide your next steps.

A. Getting started

Create a DEI statement:

- Does everyone on your team have the same understanding of what DEI means within your organization? How will you ensure everyone is on the same page?
- How do the organization's existing core values align with the principles of diversity, equity, and inclusion? In what ways can the DEI commitment statement reinforce and amplify those values?
- Were employees and other relevant parties consulted during the development of the commitment statement? How can the organization demonstrate a collaborative approach to DEI by involving various perspectives?
- Are there plans for regular updates or communications to reinforce the commitment over time? Is there a mechanism for ongoing feedback to ensure the statement remains relevant and resonates with employees?

B. Gathering information

Assess your current state:

- What is the current demographic makeup of the organization at various levels and departments?
- How does the existing organizational culture support or hinder diversity, equity, and inclusion? What are the existing barriers and challenges to DEI implementation?
- How does your organization compare to industry benchmarks and best practices? What can you learn from other organizations that have successfully implemented DEI initiatives?

Carry out an analysis of relevant parties:

- Who should be involved in DEI strategy development? How can you identify and engage individuals who represent various perspectives and experiences?
- What communication channels and methods are most effective for reaching and engaging diverse groups?
- How can you clearly communicate the purpose, goals, and benefits of the DEI strategy to ensure buy-in?

Engage your workforce and community:

- What steps can be taken to create a safe and open space for dialogue? Are there platforms for anonymous feedback? Are there incentives or rewards that can encourage active participation?
- How can the organization collaborate with external organizations, community groups, or experts to gather diverse perspectives and insights? Are there existing partnerships that can be leveraged?
- How will the organization communicate the outcomes of the engagement process and the decisions made in developing the DEI strategy? What measures will be taken to ensure transparency and build trust?

Reflect on your DEI statement:

- Does it still make sense in the context of the information you've gathered?
- Does it reflect the experiences and values of your employees?

C. Set goals and objectives

Identify key focus areas:

- What are your organization's key values? Are they reflected in your key focus areas?
- How do your focus areas align with the overall strategic vision and mission of the organization?

Define the long-term strategic objectives:

- What steps are required to achieve your overall DEI vision?
- Have you sought input from employees, leadership, and other relevant parties in identifying objectives?
- What can you learn from other organizations that have successfully implemented DEI initiatives?

Determine short-term goals:

- What actions are required to achieve your long-term objectives?
- How do your short-term goals work together to achieve your long-term objectives? What needs to be achieved first?
- How can you incorporate diverse perspectives and voices in the goal-setting process?

D. Develop an implementation plan

Define action items:

- What specific actions need to be taken to achieve your DEI goals?
- Are each of your action items measurable?

Clarify roles and responsibilities:

- Who is accountable to the overall strategy? Who is responsible for completing each action item?
- How will the organization hold leaders and employees accountable for their contributions?
- What visible support and advocacy can leaders provide for the DEI strategy?

Formulate performance indicators and timelines:

- What does success look like to the leaders of the strategy?
- What does success look like to your employees?
- Are you gathering a range of data that includes the lived experiences of your employees?
- How might the availability of resources impact your proposed timelines?

Identify potential risks:

- What did you notice in your current state assessment?
- How does the existing organizational culture support or hinder diversity, equity, and inclusion?
- What legal requirements and compliance standards exist related to diversity, equity, and inclusion in your industry and location?

Determine budget allocations and required resources:

- How will resources be allocated to support the implementation of DEI goals? Are there specific budgetary considerations for training, recruitment, or other DEI initiatives? Are there additional resources needed to implement and sustain the DEI strategy effectively?
- What resources are allocated for ongoing monitoring and evaluation?
- How can the organization adjust the budget based on the results and feedback received?

Aim for continuous improvement:

- How often will progress be assessed, and what mechanisms will be in place for ongoing evaluation?
- What channels will be used to ensure transparency about initiatives and progress?

Appendix B – Creating DEI-focused mission and vision statements

Reflect on your organizational values

The values statements or guiding principles for your DEI strategy are your core beliefs. They set the standard for behaviour and attitudes for your team towards DEI. Below are different types of guiding principles. Reflect on what your organization believes in to help define these statements.³⁵

- **Core:** Core values are the fundamental values of a company and its team members which includes empathy or responsibility.
- **Aspirational:** Aspirational values are values that a company aims to improve but doesn't necessarily meet yet. This could include equity or belonging.

You can use the following templates to create your own:

- Encourage [value] in [workplace example].
- Put [value] above all else.
- [Value] is the foundation of our purpose.

Examples of guiding principles:³⁶

- Encourage inclusiveness in every step.
- Put honesty above all else.
- Communication is the foundation of our purpose.

Create a DEI-focused vision statement

Your vision is an aspirational declaration of the organization's DEI goals for the future and the impact it aims to make.^{37 38} Consider your team's desired long-term results to create a compelling statement. A vision statement is future-focused and should be one to three sentences, written in the active voice. It is meant to inspire and motivate your team, and to give an overview of the goal of this strategy.³⁹ It is also helpful to think of ways that your DEI strategy can build on, support, or enhance your organization's overall mission and vision.

Examples of vision statements from CCDI Employer Partners:

- **Canada Post:** Our vision is to reflect Canada’s diversity and provide a safe, welcoming workplace where everyone feels valued, respected and able to achieve their full potential.⁴⁰
- **CBC/Radio-Canada:** By 2025, our unwavering commitment to equity, diversity and inclusion (EDI) in everything we do makes us an inspiring public service media company and employer. As a catalyst for change, we stand strong in our values, creating space for learning, innovation and courageous conversations. We earn trust through inclusive content that connects genuinely with people and their realities.⁴¹
- **City of Calgary:** The City of Calgary is a corporation where the collective strength of experience, skills and perspectives of our diverse workforce creates a positive work environment, exemplary results and quality public service for all Calgarians.⁴²
- **Scotiabank:** Scotiabank’s vision is to be the employer of choice for diverse talent, providing employees with an environment where everyone can thrive and bring their whole selves to work.⁴³
- **Simon Fraser University:** At SFU, our equity work builds on our institutional commitment to advancing an inclusive and sustainable future. We therefore work towards an SFU that is a preferred research university known for practicing inclusive excellence and achieving equitable outcomes for members of its community.⁴⁴

Create a DEI-focused mission statement

Your mission summarizes what your organization will do and aim to accomplish through this DEI strategy in a simple and concise way.^{45 46} Your mission statement should be less than 100 words using direct statements and strong action verbs to emphasize the impact your organization wants to have, specifically in relation to DEI. It is closely tied with your vision statement so remember to tie in your long-term goals.⁴⁷

Here is a mission statement template that may be helpful when drafting your own:⁴⁸

[Organization’s purpose],
[how the organization does what it does],
[reason behind the actions].

Examples of mission statements from CCDI Employer Partners:

- **Brampton Library:** At Brampton Library, we recognize that cultivating a respectful, inclusive culture that expands and leverages the diverse abilities and perspectives of our team is one of the keys to our growth as a community. To support our collective growth, we will actively seek to understand and collaborate with our communities so we can provide a safe space to explore ideas, learn, and build a connected community.⁴⁹
- **Home Hardware:** Inclusion@Home's mission is to promote an inclusive, open and respectful work environment where all Team Members feel valued, a sense of belonging and know they can bring their authentic self to work. We recognize and believe in the importance of Inclusion and Diversity and the impact it can have on our Team Members.⁵⁰
- **Indigo:** To intentionally make diversity, equity and inclusion embedded in how we work every day. To create a culture in which every employee feels like they can be their full, authentic self at work, and where our communities feel represented and welcomed with joy.⁵¹
- **National Bank:** We exist to have a positive impact in people's lives. By building long-term relationships with our clients, employees and communities. People first.⁵²



Helpful resources

Bilingual

- [5 tips for crafting a powerful vision statement / 5 conseils pour rédiger un énoncé de vision percutant, BDC](#)
- [Mission vs. vision statements: definitions & examples / Énoncés de mission et de vision : définitions et exemples, Atlassian](#)

English only

- [20 Guiding Principles Examples and Their Importance, Indeed](#)
- [How to Write a Vision Statement, Mailchimp](#)
- [How to Write an Effective Mission Statement in 3 Steps, MasterClass](#)

French only

- [Mission, vision, valeurs : comment définir son identité de marque ?, Hubspot](#)
- [Stratégie en équité, diversité et inclusion : par où commencer?, Gestion HEC Montréal](#)

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