1. Research & Needs Assessment
   - Purpose: Builds a solid foundation for a strategy (for phase 2)
   - Requires:
     i. Data gathering: HR data, surveys, focus groups & interviews
     ii. Establish leadership involvement & support

2. Strategy Creation
   - Purpose: Organization, planning, and creation of touchstones
   - Requires:
     i. Compelling data (from phase 1)
     ii. Solid rationale
     iii. Realistic implementation plan

3. Implementation & Integration
   - Purpose: Take action on the strategy; broader buy-in from members
   - Requires:
     i. High visibility actions
     ii. Skills training, leadership development, culture change, communication

4. Measurement & Recalibration
   - Purpose: Assess impacts of phase 3 against the strategy
   - Requires:
     i. Data gathering (so leads back into phase 1)
     ii. Amplification or discarding of activities appropriately
Phase 1: Research & Needs Assessment

- **Data gathering:** HR data, surveys, focus groups & interviews
  - Departmental make-up re: gender, Indigenous, racialized, disability
  - Rates of promotion
  - Start-up funding
  - Salary
  - Engagement and feeling of belonging in the department
  - Barriers to inclusion
  - Culture of the department
  - “Buy-in” of EDI

*Also early on: Establish leadership involvement & support*

- Department Head, Division Heads, Dean, Vice Deans communicate importance, support, and what roles they will play, to the entire department

Phase 2: Strategy Creation

1. **Mission and Vision statements**
   - Align with USask and CoM
2. **Values and/or guiding principles**
   - Includes values such as equity, inclusion, respect
3. **Competitive advantage/benefits to the organization**
   - Increased attraction and retention, engagement
   - Social responsibility
4. **Long-term strategic objectives**
   - Establish a timeline
   - Focus on a limited number of priorities
5. **Short-term goals/priorities/initiatives**
   - Communication of mission internally and externally
   - Cultural competency training, etc.
6. **Action plans/items**
   - Consider resources required
   - Communications plan
   - Training and development
7. **Scorecard/measurement frameworks**
   - “what gets measured gets done”
   - Demographics, activities, impact, outcomes
   - Quantitative and qualitative
8. **Financial assessments**
   - Analyze potential costs and risks of not implementing strategy
9. **Critical success factors and dependencies**
   - Sufficient resources
   - Buy-in, support from leadership
   - Process for review and re-adjustment
   - Flexibility
10. **RACI matrix**
    - Responsible: the person who does the work to achieve the task/make the decision
    - Accountable: person who is accountable for correct and thorough completion of the task
• Consulted: the people who provide info for the project and with whom there is 2-way communication
• Informed: the people who are kept informed about progress and with whom there is 1-way communication