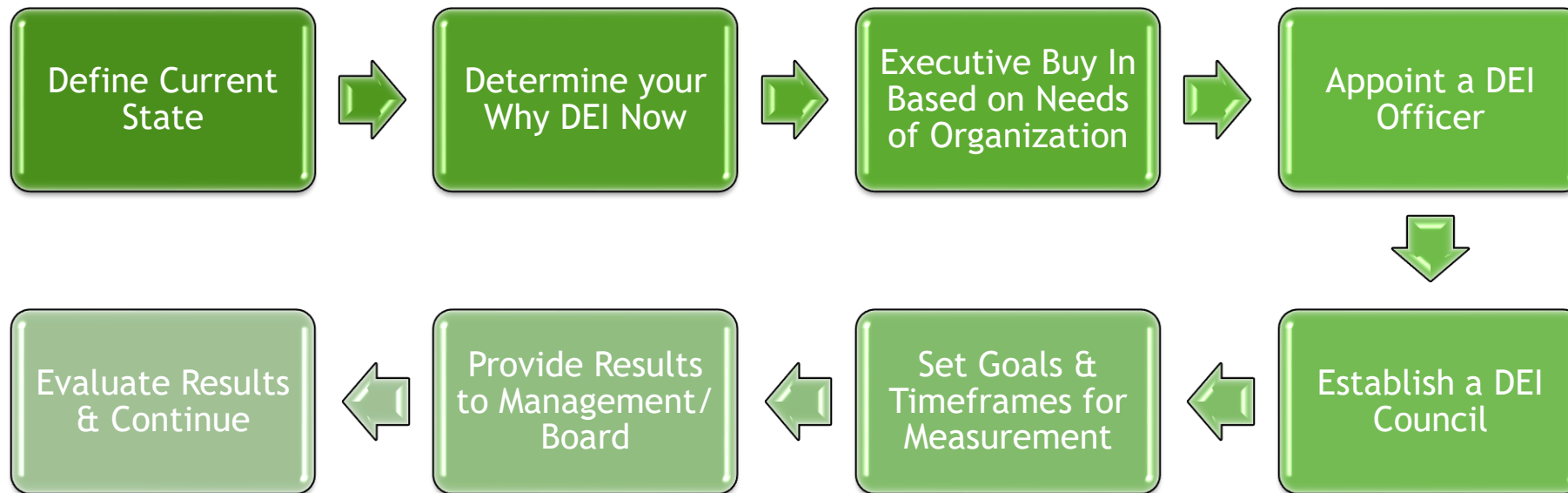


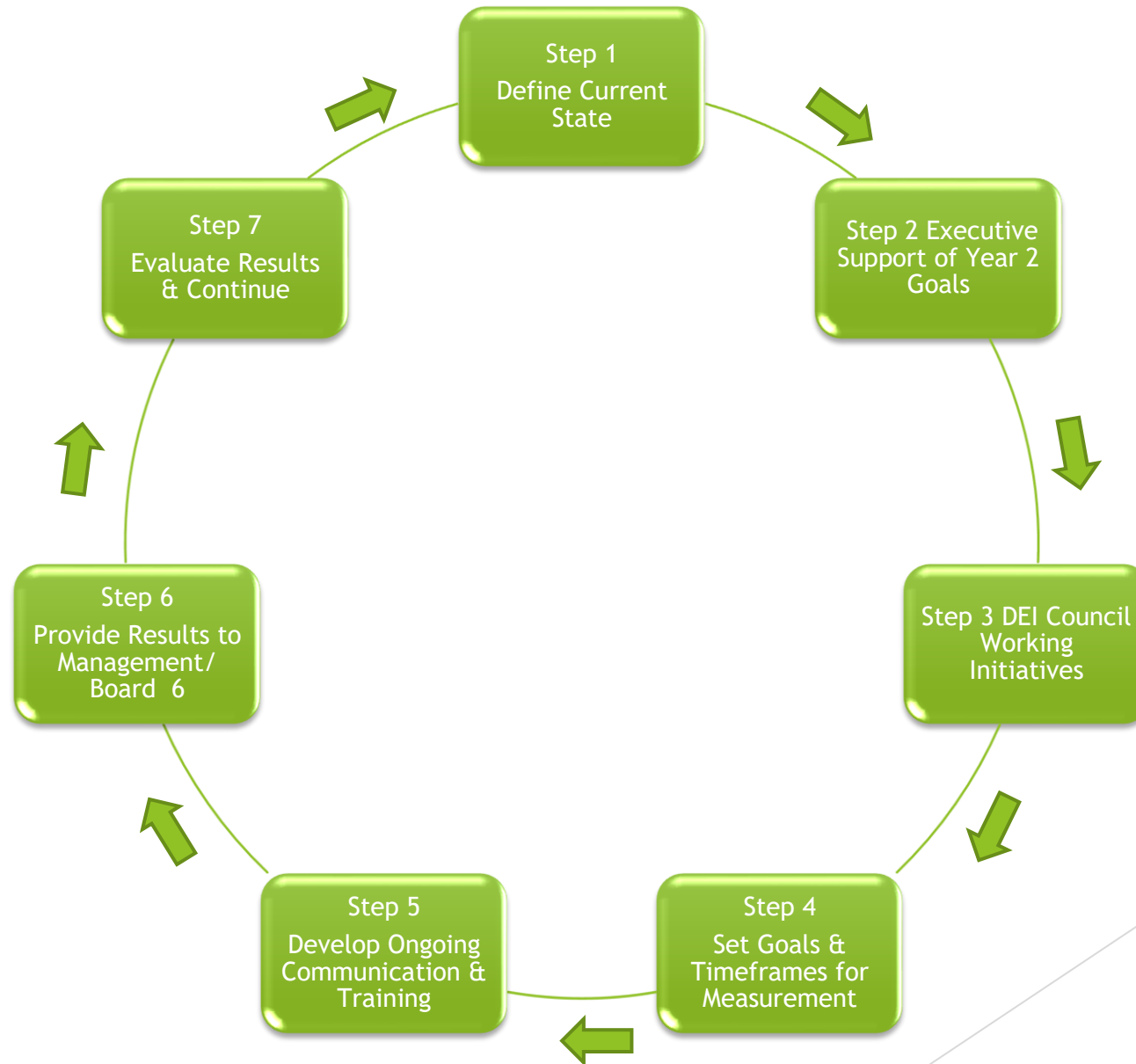


DEI - Basic Business Plan Sample Roadmap

Year 1 Sample Road Map Building to the Plan



Year 2 Sample Road Map Building to the Plan



DEI - Basic Business Plan

- ▶ Define high level current state for your organization
- ▶ Define the Why DEI/ Why now
 - ▶ Where is your organization at -define current state utilize the tool GDEIB Report
 - ▶ Understand Regulatory Environment: FDIC, ESG, CFPB
 - ▶ Human Capital+: Value to clients, communities, and teams
- ▶ Executive buy-off to proceed based on need of organization
 - ▶ Consider a consultant to navigate the process
 - ▶ Appoint a DEI Officer -responsible for creating the framework and a plan
 - ▶ Ensure DEI Officer is provided appropriate training and resource to ensure confidence & competence to do the work
 - ▶ Officer drives the plan framework development and leads the development and framework for the Council
 - ▶ Define vision and initial goals as part of plan for approval

DEI - Basic Business Plan (continued)

- ▶ Establish a DEI Council
 - ▶ Build a process to recruit council members
 - ▶ Define size and scope of the council in the original Plan
 - ▶ Identify council thru surveys & questions
 - ▶ Council is typically a body making recommendations, not decision
- ▶ Goals/Timeframe for DEI Plan Year 1-3
 - ▶ Set and communicate benchmark goals
 - ▶ Define HR metrics (baseline using such tools as Affirmative Action)
 - ▶ Recruitment & Retention
 - ▶ Employee training
 - ▶ Communication
 - ▶ Define measurement, timeframes for progress reports
 - ▶ Provide results to Executive team
 - ▶ Evaluate results and restart process
 - ▶ Define successes and areas for further opportunities