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A GUIDE TO AN EFFECTIVE ACTION PLAN



#75YearsOfCMI

Written by Sam Budd, CCMI

INTRODUCTION

As with all business activities the key to success is planning. Most organisations will have their preferred planning methodology and approach to governance, that will likely include a project or programme approach that clearly identifies individual and group accountabilities as well as setting clear key performance indicators.

If your organisation is ready to take the next step in its journey to becoming a truly inclusive organisation here is a suggested approach and some tips for getting your Equality, Diversity & Inclusion (EDI) action plan started.

Firstly, we recommend that you convene a steering group that includes a diverse range of stakeholders from across your business and beyond e.g customer or community representatives. This group should report to your senior leadership team and board. The purpose of this group is to agree with the organisation's EDI strategy and to ensure that adequate resources are allocated to this work. This group will scrutinise and monitor progress against the strategy and associated action plans. Project or programme managers for EDI activity should report directly into this group.

We recommend using a process that supports a culture of continuous improvement. Creating an inclusive organisation involves an ongoing commitment and embedding a cyclical 'evidence, analyse, plan do , review' approach that can help with making this shift - particularly if your organisation's planning is normally 'task and finish' focussed.

1

EVIDENCE

As Maya Angelou said, “you don’t know where you’re going if you don’t know where you’ve come from”. It is important that you gather and interrogate a wide range of data from quantitative data that you might already be collecting for government return, such as Gender Pay Gap or the feedback from internal staff surveys, but also qualitative data such as the case studies from our own employees or feedback from staff networks.

If you are a senior leader or are responsible for this area of work, make sure that you are triangulating this information by speaking with staff yourself and assuring yourself that the data is being interpreted correctly.

2

ANALYSE

Remember to consider the information that you receive through an intersectional lens so that you can start to improve the impact of the interventions and actions that your organisation puts in place. Remember that you are dealing with real people in the real world, and they do not come in neatly packaged categories. That said as you analyse your data, themes will emerge for particular groups that will require specific intervention e.g improving recruitment and progression for black staff or improving representation of women at board level etc.

3

PLAN

Having gathered the evidence and analysed the challenges, you are now ready to develop your plan of action and set ambitious but realistic goals and targets. Measuring the impact of some of the activity will be easier than others, but we urge you not to simply do what looks good but to challenge your organisation to tackle difficult areas too. We recommend using a maturity model approach to planning whether that is strategic or operational plans. This will help you to understand your specific context and to frame your goals and performance indicators.

4

DO

Hopefully the steps so far will have ensured that you have adequately resourced planned activities and interventions, and you will have built in an interim reporting structure so that any issues that arise during the implementation phase can be addressed and iterative adaptations made if required.

5

REVIEW

In addition to the ongoing process of progress monitoring , we recommend including a formal review of your plans as they come to their fruition so that you learn lessons and can build on them and ensure that they inform the next steps of your EDI journey.

6

THE NEXT CYCLE

The cycle starts again as the findings of the review stage form the basis of the evidence for the next cycle of planning and activity.

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Chartered Management Institute
Management House
Cottingham Road, Corby
Northamptonshire, NN17 1TT

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