

Tech Inclusion Journey Step 3: The Route Action Planning Facilitator's Guide

ncwit.org

THE
IDEA
YOU
DON'T
HAVE

IS THE
VOICE
YOU
HAVEN'T
HEARD.

NCWIT.
Inclusion changes
what's possible.

LIFETIME PARTNER



STRATEGIC PARTNERS



INVESTMENT PARTNERS

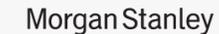


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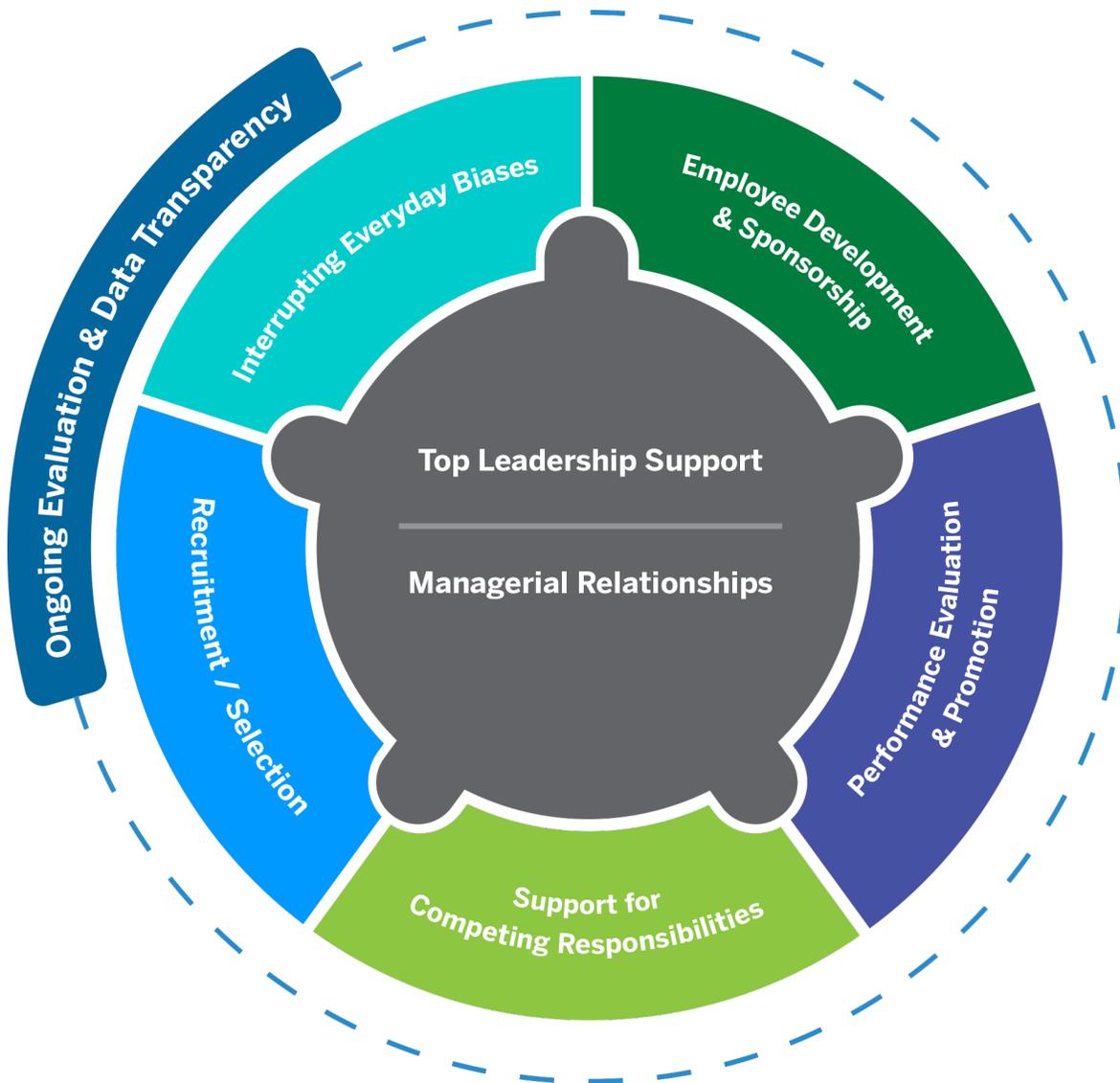
THE PURPOSE

What will you learn from this guide?

- Smoothly transition from GPS results to strategic action planning
- How to set and align cultural goals, objectives, and specific actions
- Establish and collect appropriate metrics for your efforts to assess progress

THE PROCESS

Recommended TIJ Process

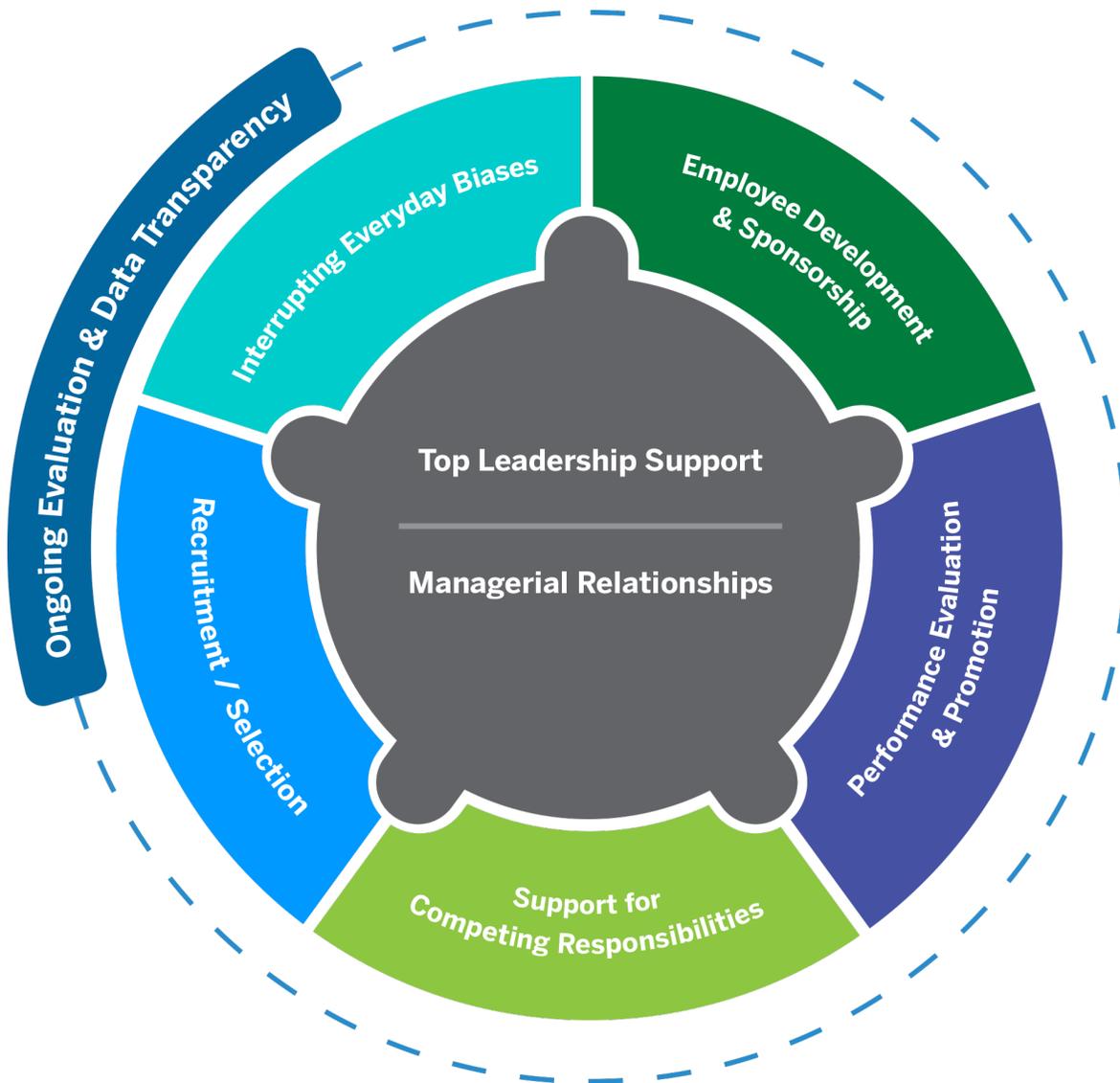


Prep

- Decide who “you” are and assemble TIJ Team
Plan on an 8 hour process from start to resulting Action Plan
- Tour the TIJ together
or do an NCWIT Grounding Session

Step 1: The Map: Explore and understand the key focus areas

Recommended TIJ Process



Step 2: The GPS: Complete and come to consensus

- Option 1: Everyone completes entire GPS and brings their results to the conversation for discussion.
- Option 2: Everyone completes only one area of the GPS and then you conduct the consensus conversation for that area before moving on to the next—repeat until complete.

Step 3: The Route: Prioritize focus areas and start action planning

Action Planning Session Guidelines

- Set a conversational tone with your own behavior.
- Begin with the end in mind. Consider what success would look like from diverse points of view and what metrics would demonstrate progress or success.
- At the beginning, the senior leader/s should make clear that it is okay to disagree and dissent; the goal is to have open and honest conversation.
- Employ a spirit of inquiry: “Can you say more about this?” Or ask probing and/or follow up questions.
- Thank and validate your team members as you go and ensure turn-taking.

THE STEPS

Action Planning Steps

Step 3a: Prioritize your Focus/Foundation Areas

Step 3b: Set goals for each Focus/Foundation Areas

Step 3c: Identify your objectives aligned with each goal

Step 3d: Identify your actions aligned with each objective

Step 3e: Establish appropriate metrics for assessing progress



Step 3a: Prioritize your Focus/Foundational Areas

- Use the Tech Inclusion Journey Action Planning Prompts and Action Planning Tables to help the team identify 2-3 focus or foundational areas for action
- Especially consider whether you might build off the momentum of existing efforts or begin in areas that lack current efforts by are particularly urgent or timely
- Also consider which areas might have better buy-in or be better supported and resourced



Step 3b: Set goals for each Focus/Foundational Area

- For each prioritized area, set a goal for which zone you are aiming to progress toward in what time frame (e.g., from Preparing to Grounding in the next 2 years)
- Consider what is realistic in terms of time, resources, personnel and buy-in from top leadership and other stakeholders
- It's also okay to set an “aspirational” goal that you may not fully reach, but that will motivate action



Step 3b: Goals

Each Focus Area you prioritize should have the goal of leveling-up in terms of Tech Inclusion Journey Zones. Consider the following questions:

- What existing goals or change efforts might we build upon and how do they need to be modified, if at all?
- Does it seem best to build on existing efforts that already have momentum? Or does it seem better to begin efforts in an area that is urgently lacking?
- How long will it take and/or how long do we have to achieve our goals?

Step 3c: Identify your objectives aligned with each goal

- Refer to zone descriptions and notes from consensus conversations to help identify what you need to do to move to the next zone
- Identify one or two objectives you wish to accomplish in each focus area
- It may be helpful to do this in an iterative process—looking at some of the action listed on the Route page associated with your focus area to give you ideas for objectives



Step 3c: Objectives

These are strategic milestones on the way to your goal. We suggest identifying 2-3 objectives to begin with. Consider the following questions:

- What must be accomplished to reach your goal? (Read over the Zone Description you're intending to achieve for suggestions of objectives. e.g., develop a shared language, begin codifying processes).
- Will you be building on any existing efforts that already have momentum?
- Are the people with power to make change supportive and willing / able to engage?
- Do you have the resources (time, people, tools, money) to devote to this effort?

Step 3d: Identify actions that align with your objectives

- Visit the Route pages associated with your prioritized focus areas and look through the suggested actions and resources
- Select a couple of actions to implement that will help you accomplish your objectives
- Note that actions may apply to more than one zone
- The most appropriate actions to take will also depend on what kinds of things your organization has already implemented

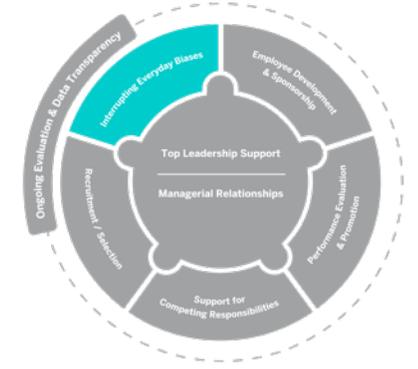


Step 3d: Actions

Actions move you from strategic to tactical planning. Consider the following questions:

- What *tactical actions* will you take to accomplish your objectives?
(Consult the Route page in the TIJ for a menu of possible actions to consider for each Focus Area of the Map)
- What team, dept, or division will be involved?
- How and why are your planned actions sequenced or related (if they should be)?
- Are there actions/interventions that can address multiple focus areas at once?

Example objectives and aligned actions



Interrupting Everyday Bias

Goal: Move from Emerging to Grounding in Year 1

Objectives:

- Develop a team-based shared language
- Improve ability to identify & interrupt everyday bias



Actions:

- Conduct manager training workshops to interrupt bias
- Audit physical office environment

Grounding

Ongoing, coordinated efforts (e.g., learning conversations) to develop a shared team-based understanding/language of key concepts and research is underway; Pilot efforts to address bias and codify one or more processes/practices in selected focus area are being implemented; Some description and measurement of implementation and impact is in process of being collected

Emerging

May have isolated efforts (e.g., one-off trainings) where individuals are beginning to learn key concepts/research, associated with selected focus area; Isolated but uncoordinated efforts to implement or improved key processes and practices exist; Methods and tools for description and measurement of implementation and impact are being developed

Step 3e: Establish appropriate metrics for assessment

Consider two types of metrics

- **Implementation Metrics:** *What* was done, *how* was it done and *why* was it done (e.g., keep track of initiatives, programs, practices, policies, and strategies)
- **Impact Metrics:** The results of what is implemented (e.g., demographic and experience/perceptions/climate data)



Step 3e: Implementation Data

Implementation Data refers to what was done (actions, initiatives, programs, practices, policies). For ideas about data you need to collect, consider the following questions:

- What was done? (e.g. workshops, job description analysis, policy reviews, etc.)
- Who was involved? (group of people involved and/or reached)
- How was it done? (descriptions, methods, outlines, etc.)
- Why was it done? (alignment with goals and objectives)

Step 3e: Impact Outcomes & Indicators

Impact Outcomes & Indicators refer to the results of what was implemented. For Impact data you need to collect, consider the following questions:

- What changed? What is different after you've reached your goal, both in the short-term and in the long-term and how will you know?
- What kind of Representational Data may inform your progress (e.g. demographics of teams, depts, or divisions: gender, ethnicity, age, etc.)?
- What kind of Experiential/Perceptual Data may inform your progress (e.g. pulse surveys, participant perspectives, climate surveys, attrition rates, etc.)?

**Questions? Contact NCWIT
for additional information &
assistance.**