

## Appendix 3: D&I Action Plan Template

The output from the discussions kicked off by the [D&I Action Plan kick-off meeting](#) will be to capture the firm’s context and intentions in relation to their ongoing D&I activity. The purpose of the D&I Action Plan template is to provide a framework for firms to capture this output and to provide context for the ongoing work. The plan will also provide a tracking facilitation to record and capture progress against milestones and metrics agreed at the inception of the plan.

Updating the plan and monitoring its success and progress is further discussed in [Section 3](#). Advice in this section should be leveraged to ensure ongoing development of your D&I approach.

### D&I Action Plan [Firm Name] as of [Date]

#### Purpose

*Provide a brief description of the Plan and its purpose, based on what has been agreed is the Business Case for the firm and the desired Future State discussed as part of the step-by-step process outlined in [Section 2](#). This statement should be aspirational in nature.*

#### Governance & Resourcing

*Provide a summary of how this plan will be monitored and who has ownership of the plan. Questions to guide this input are present in [Section 2](#), and include how, when and to whom progress on the plan will be reported. This section should also include the role of key stakeholders as identified in [Section 2](#).*

#### Goals & Action Tracking

*Provide a list of the goal areas agreed and the related actions from the D&I Matrix. There is an opportunity here to include context on why these were selected as priority goals for the firm based on the discussion into the future state aspirations.*

<b>Objective</b> List the goal these actions relate to. Each goal may have multiple actions associated with it	<b>Action</b> Detail and describe the action to be taken	<b>Update</b> Provide an update on progress towards achieving the goal on an at least quarterly basis. Updates should be provided to the D&I coordinator by the owner of the action	<b>Owner</b> Name of the individual responsibility for executing on the action. Owners should be from different levels and areas of the firm to enhance knowledge and engagement	<b>Measure of success by milestone date</b> Detail what success in achieving this action will look like and when it will be achieved by