

## D&I Action Planning Kick-off Meeting Template

<b>Date:</b>	xx/xx/xxxx	<b>Time:</b>	xx:xx	<b>Location:</b>	Conference room X/Teams/Zoom
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### Meeting participants:

[Meeting participants should be identified based on advice in Section 2, Step 1]

Participant	Position

### Agenda:

Agenda item	Time allocation	Agenda item
Item 1	10 minutes	<p><b>Welcome everyone and discuss the purpose of the meeting (ensure the use of inclusive language)</b></p> <p>This is an opportunity for a senior leader to set the context of the discussion and speak about the importance of this work to the firm. Use <a href="#">Section 2, Step 2</a> (Link to your Business Strategy) for ideas on how to set the context for this conversation and how it will be valuable to your firm</p>
Item 2	10 minutes	<p><b>Review the steps to draft a D&amp;I Action Plan for the firm</b></p> <p>Review the steps outlined in <a href="#">Section 2</a> of the D&amp;I Toolkit</p>
Item 3	20 minutes	<p><b>Review the detail of the step-by-step process and the D&amp;I Matrix</b></p> <p>From <a href="#">Section 2</a> and <a href="#">Appendix 2</a>, review the detail in the Toolkit to determine how the firm will address the work required based on goals identified</p>
Item 4	20 minutes	<p><b>Agree next steps</b></p> <p>In this section of the meeting, determine how the firm will proceed to work through each of the steps. For example, it may be agreed to allocate each of the elements to one member of the group to present back at the next meeting.</p>