

Vision and goal setting guide

This tool is designed to help board members draw on their self-assessment reflections and their peer's feedback to develop a set of key priorities and goals related to diversity, inclusion and equity.

The suggested activities and worksheet provide opportunities to build a strong vision of what you want to achieve, identify actions you will take to meet your goals and provide resources to help you monitor your progress against your goals.



IDENTIFY YOUR GOALS AND PRIORITIES

- What do you want to achieve in the short-term (<12months) and long term (1-5 years)?
- What would diversity, inclusion and equity look like in the future?
- What changes need to be made to achieve your vision of diversity, inclusion and equity?
- Identify any priority areas that may relate to your goals (i.e. culture, recruitment, learning and development etc.)



SET SMART GOALS

- **SPECIFIC** – state exactly what you are going to do, for whom, and to what end
- **MEASURABLE** – you and the organisation can track your progress and have tangible evidence that you accomplished what you set out to do
- **ATTAINABLE** – finding a balance between achievable and providing a level of growth that is aspiration yet still reachable
- **RELEVANT** – goals that connect with the overall mission and vision of the board
- **TIME-BOUND** – goals that are connected to milestones and benchmarks can motivate you to move toward completion.

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For each individual goal you are proposing, use a separate sheet. The goals, strategies, deliverables and metrics identified will be included as part of your action plan.

1. WHAT ARE YOU TRYING TO ADDRESS?

What is the opportunity or challenge, the need, or the new direction you would like to pursue?

Example: Providing an inclusive and respectful board environment for all members

2. RELEVANT FACTORS AND ASSUMPTIONS

What relevant factors impact or are related to this goal?

Example: xxx

3. LONG TERM GOAL

What do you want to achieve or change in regard to the above priority in the next 1-5 years?

4. SHORT TERM GOAL

What benchmarks must be met to ensure that the long term goal will be achieved?

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4. STRATEGIES

What general strategies or approaches you will use to accomplish your goals?

Example: Providing an inclusive and respectful board environment for all members

5. DELIVERABLES

For each strategy, list the specific actions or resources you will use to implement it.

Example: Organise a Board D&I training workshop

6. METRICS

What information will you track and review to measure both short and long term progress towards your goals? What source(s) will be used?

Example: Engagement survey results