Vision and Goal Setting Template

This template will help colleges/schools/administrative units look across the data and planning process to develop specific goals, action items, and implementation strategies. The Vision and Goal Setting Template content is adapted from the [University of California, Berkeley Division of Equity and Inclusion Strategic Planning for Equity, Inclusion, and Diversity Toolkit.](#)

Clarify Your College/School/Administrative Unit Vision

As a committee, imagine what the college/school/administrative unit will be like in 5 years if the diversity plan is successful. Questions to guide the discussion might include:

- What impact do we hope to achieve within the college/school/administrative unit as a result of the diversity plan and implementation?

- How would we like our college/school/administrative unit to be recognized in relation to diversity, equity, and inclusion within the university and in the larger community?

Goal Development Worksheet

Utilize a separate copy of the chart below for each priority.

1. PRIORITY YOU ARE 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 environment in the department/unit where all students, faculty, and staff feel welcome and valued.
2. RELEVANT FACTORS AND ASSUMPTIONS What relevant factors impact or are related to this priority? Example: Survey and focus group data suggest concerns about disrespect and exclusionary behavior among underrepresented groups in the college/school/administrative unit.)
3. GOAL(S) What do you want to achieve or change in regard to the above priority? Consider both short-term and long-term goals. Example: Improve relationships, increase respect, and eliminate exclusionary behavior so that all members of the college/school/administrative unit are able to report feeling comfortable or very comfortable with the climate.

4. STRATEGIES What general strategies or approaches will you use to accomplish your goals? Example Enhance training on cross-cultural communication and an inclusive workplace for all of our employees, especially managers.	DELIVERABLES For each strategy, list one or more specific actions or resources you will use or develop to implement it. Example: Develop an all staff training plan with campus partners for enrolling in relevant workshops.

5. METRICS What information will you track and review to measure both short term and long-term progress toward your goals? What source/s will be used? Example: Percentage of employees reporting that they feel comfortable or very comfortable with the climate of the unit. Data sources might include a survey or focus group data.