

What it is

An assessment of the effectiveness of an organization's existing vision, mission and values

What it can do

This tool can help leaders and consultants:

- Assess the degree to which the existing vision, mission and values are serving their needed functions in an organization.
- Clarify specific gaps in the existing vision, mission and values and how they're being implemented in organizational life.
- Help determine whether an organization is in need of work on vision, mission or values.

How it works

The digital version of this PDF form can be filled out using Adobe Reader. It can be downloaded at: atctools.org/resources/tools-for-transformation

Rate your responses to the statements in the assessment that follows using a scale of 1 to 7, with 1 representing NOT AT ALL and 7 representing COMPLETELY.

- The tool should be given to as many key organizational stakeholders as possible.
- It is best to have data collected confidentially, by creating either an online survey or having individual members fill out printed copies.
- The results should be reviewed by key leaders to determine what, if anything, is needed to address gaps identified in the assessment.
- Share highlights of the survey and any actions to be taken with those who filled out the assessment.

If work is needed on vision, mission and/or values, refer to our series of articles, ***Visioning Toolkit***, filled with best practices on how to facilitate these processes. You can download the articles in this series, and many other tools for transformation, at: atctools.org/resources/tools-for-transformation

To what extent are the following conditions present in your team or organization?
Please circle the number which best describes your experience.

1) People in the organization are passionate and enthusiastic about what the organization is doing and where it's going.

NOT AT ALL COMPLETELY
1 2 3 4 5 6 7

2) Those who work here feel like they're all heading in the same direction.

NOT AT ALL COMPLETELY
1 2 3 4 5 6 7

3) If asked, every person, regardless of their position, could give a 1-2 minute accurate description of your organization's mission, vision and chief strategies for achieving the mission.

NOT AT ALL COMPLETELY
1 2 3 4 5 6 7

4) People in the organization regularly and effectively use our mission and vision as a guide to planning, setting priorities and all important decisions.

NOT AT ALL COMPLETELY
1 2 3 4 5 6 7

5) There is such alignment around our mission and vision that significant decisions do not trigger different assumptions about the organization and its direction.

NOT AT ALL COMPLETELY
1 2 3 4 5 6 7

6) There is strong alignment and consistency between our vision/mission and the organization’s programs, skills and financial priorities.

NOT AT ALL COMPLETELY
 1 2 3 4 5 6 7

7) The external world – potential donors & supporters, the media, allies and adversaries – has a clear and compelling picture of the organization, what it stands for, why it’s important, and what distinguishes it from other similar groups.

NOT AT ALL COMPLETELY
 1 2 3 4 5 6 7

8) There are explicit organizational core values, and people in the organization are clear about what these are. It is obvious when “off” behavior occurs at an individual or group level, and leadership holds itself and the organization accountable to these values.

NOT AT ALL COMPLETELY
 1 2 3 4 5 6 7

9) People throughout the organization understand and feel the connection between their daily tasks and where the organization is going.

NOT AT ALL COMPLETELY
 1 2 3 4 5 6 7

10) Our vision/mission is relevant to and resonates with contemporary conditions in our environment.

NOT AT ALL COMPLETELY
 1 2 3 4 5 6 7

11) Our vision/mission positions us well to deal with potential changes over the next 5-10 years.

NOT AT ALL COMPLETELY
 1 2 3 4 5 6 7

12) Is there substantive unclarity or disagreement around vision within your organization? If so, what?

What is the impact on performance?

13) How in tune do you personally feel with your organization's overall vision and mission? How well is it currently serving as a vehicle for the fulfillment of your own personal purpose?