

What it is

A series of articles and best practices for facilitating visioning with teams and organizations

What it can do

This tool can help leaders and consultants:

- Facilitate creating a Mission Statement
- Facilitate creating a Vision
- Facilitate creating Core Values
- Help ensure these become integrated into organizational work and culture

How it works

The Visioning Toolkit includes the following articles, best practices and tools:

1. *What is Visioning?*
2. *Best Practices*
3. *Facilitating Mission*
4. *Facilitating Vision*
5. *Facilitating Values*

You can download the articles in this toolkit, and many other tools for transformation, at: atctools.org/resources/tools-for-transformation

*This is the 1st article of 5 in the Visioning Toolkit series.
You can download the articles in this series, and other tools, at:
atctools.org/resources/tools-for-transformation*

"The function of a leader – the one universal requirement of effective leadership – is to catalyze a clear and shared vision of the organization and to secure commitment to and vigorous pursuit of that vision."

*– Collins Porras, from *Built to Last**

Leaders can do nothing on their own. Leadership is all about engaging others – to bring together the passions and commitments of human beings in concentrated power. And, the primary means for aligning people is to share a common vision.

What is a vision for an organization? It is:

- *an organizing and unifying focus for organizational efforts*
- *a compelling picture of what the organization hopes to create*
- *an inspirational focal point for the spirit of the organization and all those who work there*
- *an agreement about why the organization exists and what it intends to do*

***Visioning** is a process of aligning energy in common cause around an inspiring picture of the future. It can take many forms, and operate at any scale:*

- *Forging a vision for an organization, a department or function within an organization*
- *Creating a vision for a campaign or a project*
- *Revisiting and updating an existing vision*
- *Integrating multiple visions in a partnership, alliance, coalition or merger*

Alignment around vision is the foundation of a healthy, robust organization. Many organizational problems – from strategic challenges to interpersonal breakdowns – are actually symptoms of a lack of agreement around direction.

Yet, there is often a rush to action in social change organizations. Visioning may be seen by some as an interesting but not critical function. Boards and leaders are sometimes prone to wanting to skip this step. When I have been invited in to help with strategic planning, I frequently find that the organization is not sufficiently aligned on its direction to fruitfully engage in planning. It's like trying to put up walls and a roof on a foundation that's fundamentally uneven.

Leaders at the top of the organization often don't see the need for visioning. They may have so fully internalized the vision that they fail to recognize that what's so clear in their own mind isn't necessarily clear to others.

I was once contacted by the Board Chair of a national environmental organization to come do visioning. When I asked why was he approaching me rather than the ED, he responded, "Our ED doesn't think we need visioning. If

you ask, he'll give you a 10 year-old vision statement to read and say, 'Here's our vision. What's wrong with this?' I didn't see much value in trying to do visioning without the founder/ED, so I gave him a call. Sure enough, when I asked him about visioning he said, "I'll send you our vision statement. Tell me what's wrong with it."

I paused. "How many do you have on your staff, and how many of those staff were here when this was written?" He responded, "We have about thirty now, but only three were on board back then." I chose not to say anything, allowing him to ponder his own words.

After a few moments he spoke again. "You know, before this I started another environmental organization. A few of us sat by the river for three whole days, thinking, looking at the river, and dreaming about what we could do. That's how we birthed that organization, and we all owned it because we dreamed it. I'm thinking that the people here need to do something like that. We need a vision for the 21st century!"

Problems around mission, vision or values can show up in many different ways.

See our tool *Organizational Vision Assessment* to determine the effectiveness of your organization's existing mission, vision and values.

Where does an organizational vision come from?

Sometimes leaders, like this Executive Director in the above story, have their own vision. Then, the great challenge is how to engage others in their organization so that people feel ownership of the direction and give their full commitment to its success. But, notice the word "catalyze" in the opening quote from Collins & Porras. It is absolutely the leader's responsibility to make sure there is a powerful and compelling vision. This does not necessarily mean that the leader has to go off in isolation to create it. Many of the leaders I have coached and trained feel overly pressured – as if they're supposed to go up to a mountaintop, receive a vision, and bring it back to the people (like Moses bringing back the 10 Commandments from Mt. Sinai).

Some leaders will have their own vision, but all leaders should become adept at **visioning**: *the art of engaging and guiding people in creating and aligning around a vision.*

The purpose of this series of papers is to help leaders and the consultants who support them to guide the process of visioning.

What about mission, purpose, and all those other words?

There are many models for visioning and there is little agreement on terminology. One organization uses the word “mission” for what another calls “vision,” while other groups may use the word “purpose” or “strategic direction.” What’s important is that people in the same organization consistently use the same terminology.

Our model for visioning has three elements:

1. **Mission:** the organization’s purpose and what it will do to achieve this.
2. **Vision:** a compelling picture of the future that will be achieved by fulfilling the Mission.
3. **Core values:** the standards by which the organization will behave in order to achieve the Mission and Vision.

Let’s look at each in turn:

Mission

A good Mission statement makes clear the organization’s purpose. We human beings want to feel a sense of purpose for our work, to know *why* we are doing what we do. This is not just about feeling good – it’s about results. Research has shown that workers’ ability to connect what they do to a larger, more meaningful organizational purpose translates to “greater ownership for organizational outcomes.”¹ Shared purpose provides the needed energy for a strong and vibrant organization.

“Purpose is the motivating force for achievement. When you are doing something which serves your purpose, you are at your best.”

– Sun Tzu

Purpose is an organization’s fundamental reason for existence. It tells us what human needs the organization seeks to fill or the impact it intends to make in the world. Purpose is enduring. While the form of an organization’s work may change over time, purpose usually does not.

In addition to purpose, the Mission statement also makes clear what work the organization will do to fulfill this purpose. Purpose is broad and its expression could take many forms. For example, there are many groups whose purpose is to end hunger, but see how their Mission statements define three quite different areas of work:

The Food Research and Action Center (FRAC) is the leading national nonprofit organization working to improve public policies and public-private partnerships to eradicate hunger and under-nutrition in the United States.

Feeding America is the nation's leading domestic hunger-relief charity. Our mission is to feed America's hungry through a nationwide network of member food banks and engage our country in the fight to end hunger.

¹ Wrzesniewski, A., et al., “Jobs, Careers and Callings: Peoples’ Relations to their Work”, *Journal of Research in Personality*, pg. 31, 21-33, 1977.

The Community Food Security Coalition catalyzes food systems that are healthy, sustainable, just, and democratic by building community voice and capacity for change.

In addition to Purpose, the Mission defines what business we're in. We see here from the National Gay & Lesbian Task Force a good example of the relationship between an organization's purpose and its work.

Purpose: We are the uncompromising national voice for full LGBT equality.

The work: to build the power of the lesbian, gay, bisexual and transgender (LGBT) community from the ground up.

The Mission statement is the defining, clear and powerful statement of who we are and what we're doing--the foundation upon which we build organizational goals and strategies.

Vision

The Vision describes the world that organizations seek to create through the work of the Mission. It is:

- a compelling image of the future
- an imagination-stretching yet still credible view of what's possible
- a dream that engages the heart and spirit and inspires people to action

"Martin Luther King famously proclaimed 'I have a dream,' not 'I have an issue.'

– Van Jones

Race Forward (formerly Applied Research Center) is a racial justice think tank, the publisher of *Colorlines*, and a home for media and activism. Its Mission is:

"To build awareness, solutions and leadership for racial justice by generating transformative ideas, information and experiences."

See how Race Forward's Vision describes what the world will look like if it succeeds in its Mission:

"We envision a vibrant world in which people of all races create, share and enjoy resources and relationships equitably, unleashing individual potential, collective responsibility and global prosperity."

This is a dream that can inspire people to dedicate their hearts and bodies to the work of racial justice.

Vision statements can be very brief. For example:

Teach for America: *One day, all children in this nation will have the opportunity to attain an excellent education.*

Vision statements stretch our sense of what's possible by being unafraid to call forth what the organization really wants to see.

Rainforest Action Network: *We envision a world where each generation sustains increasingly healthy forests, where the rights of all communities are respected, and where corporate profits never come at the expense of people or the planet.*

Visioning calls forth our imagination and our courage.
In the words of Harriet Tubman:

“Every great dream begins with a dreamer. Always remember, you have within you the strength, the patience, and the passion to reach for the stars to change the world.”

Core Values

Core Values express how we choose to act as an organization and as individuals in order to achieve our purpose. Values reflect:

- Our most basic precepts about what's important in our organizational, professional and personal lives – what is to be held sacred and inviolate
- Those enduring principles that are the core of the organization's potential greatness
- The standards against which acceptable and non-acceptable behavior is determined

“Any organization, in order to survive and achieve success, must have a sound set of values on which it premises all its policies and actions. The most important single factor in organizational success is faithful adherence to those beliefs. The organization must be willing to change everything about itself except those values as it moves through life.”

– Collins & Porras, from *Built to Last*

Values are not adopted by an organization simply because they are good and noble. They must be integral to the success of the Mission and Vision. In looking at Race Forward's Values, we see the intimate connection between their vision of racial justice and their core principles:

- **People of Color:** We value the voices, experiences, cultures, intellect and multi-dimensionality of people of color.
- **Justice:** We value fairness, the best foundation for unity among all people.
- **Transformation:** We value the ability of individuals and systems to change in ways that make racial justice possible. We recognize the importance of struggle in fueling transformation.
- **Bridging:** We value the insights, relationships and holistic understandings that are deepened when divergent paths come together.
- **Expression:** We value voicing and sharing our viewpoints with integrity even when difficult, unpopular or risky.

Organizations and their people are challenged to translate such inspiring words into everyday behavior. But, it's the power of living its Core Values that helps define a great organization.

Vision as a Practice

Visioning is a practice that offers organizations greater clarity, direction and power. Within organizations, departments may want to have their own visions nested under the meta-vision. For example, the development department may have its own Mission and Vision of what success will look like. Values typically are consistent across different parts of the organization. Different departments, however, may want to explore how those Values will actually play out in their particular context.

Projects, alliances and campaigns, all can make use of visioning:

- What is the Mission of this project?
- What is our Vision of success?
- What are the Values we will exemplify in our work?

Within an organization, we use visioning to guide strategic decisions and allocation of resources:

- How will this project further the Mission of the organization?
- How does this program help move us towards our Vision
- How do our organizational Values inform this decision?

Conclusion and an Introduction

Whatever terms one may use, aligning around a Mission, a Vision, and Core Values is the foundation for a healthy and powerful organization.

The following four articles in this series are intended to help both leaders of organizations and consultants facilitate visioning.

This series of papers will focus on how to lead visioning for an organization, but the same principles, practices and tools are completely scalable to visioning for a team, a department, or launching a new campaign, initiative or project.

Visioning Toolkit #2: Best Practices

Visioning Toolkit #3: Facilitating Mission

Visioning Toolkit #4: Facilitating Vision

Visioning Toolkit #5: Facilitating Values

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Whatever the nature and scale of your organization, team or project, there are some best practices in visioning that apply to almost any situation. The following story illustrates some of these practices.

I was hired to do strategic planning by the Executive Director of a Progressive think tank doing research and advocacy around issues of economic justice. Before planning a retreat, I interviewed staff. It's good that I did so, because I discovered real confusion around the fundamental direction of the organization. All of the staff in the research department felt that the heart of the organization was in advocacy and believed that their contribution was less valued. Strangely, most of the staff engaged in advocacy felt the opposite – that the priority of the organization was research – and they were unsure of the organization's commitment to advocacy.

The ED was dumbfounded when I brought her these results. Showing me their annual report, she said, "Look at our mission statement. The whole point of our organization is the synergy between research and advocacy! Do these people really work here?" Overcoming some initial reluctance, I convinced her that we needed to align around vision before we started strategic planning.

We began the retreat with an exercise in which people shared personal stories about why they do this work. People came out of the process feeling more connected to their own sense of purpose, and more connected to the organization and its potential.

To learn more about this exercise, see our tool: *Appreciative Inquiry Process*

This was followed by a visioning exercise. Energy filled the room as mixed teams from advocacy and research worked hard creating an imaginary New York Times Magazine cover story 10 years in the future, celebrating the success and impact of the organization.

To learn more about this exercise, see our tool: *Magazine Article Process*

The four teams then proudly presented their stories. Each story highlighted the unique contributions and synergy of research and advocacy in impacting economic policy. The groups were so pumped up that they demanded to rewrite the mission statement. A small group of writers was still working feverishly when I went to bed. The next morning the group proudly unveiled the new mission statement, and in a surprisingly meaningful ritual, everyone signed it on a large, hand-decorated mural.

If you put their 'new' mission statement next to the existing one, the variances were nuances – not substantive. But the real difference was that every person

in the room, whether doing research, advocacy, development or administration, now personally felt ownership of and commitment to the vision.

We see in this story some best practices in visioning:

1. Seek maximum engagement
2. Engage the heart
3. Focus on alignment
4. Avoid the rabbit hole of wordsmithing

1. Seek maximum engagement

In many organizations, the vision is merely words on a document that have no meaningful impact on the daily life of those who work there.

The remedy: to engage as many key stakeholders as possible in the visioning process so people have a personal investment.

This is easier to accomplish in smaller organizations where it's possible for everyone to sit in a room together and work things out.

In larger organizations, we usually need to create a cascading process of engagement. A smaller group initiates the visioning process, followed by a series of opportunities for others in the organization to respond and give input. The mechanics of this will vary depending on the nature and size of the organization. But, the best practice remains the same: for the vision to really take hold there must meaningful engagement with all the people whose commitment will be needed to implement the vision.

Here's a story about birthing a new vision in a massive organization. It may offer some perspective on this notion of cascading engagement.

In the 1980s, I helped lead a comprehensive revisioning process at one of the largest U.S. banks, which was failing to adapt its culture to meet the surge in competition from overseas banking. We began working intensively with the top 20 executives. They had no experience of being a team, and alignment was extremely challenging as the different divisions and their leaders had a history of considerable autonomy and internal competition. (The leader in charge of their thousands of local banks wouldn't aggressively promote their own Mastercards due to competition with the leader who ran the credit card division.) After considerable struggle, confrontation, breakdown and finally a breakthrough, the top leaders were able to draft a new vision for the bank. For the very first time, they committed to something greater than their individual agendas.

Taking our advice, they realized that unless the 130 Senior Vice Presidents were fully on board, this vision wouldn't change anything. So in a 4-day retreat, the SVPs tore it apart and put it back together. My consulting team then led a series of 3-day retreats for 4000 Vice Presidents on five continents to refine the vision. It was an iterative process. Increasing elements of the vision began being set in place, but over the next six months, meaningful changes were still made to the original vision. The final step: over the next two years, all 40,000 staff around the world – from managers to back-room check processors – participated in

transformational retreats to engage with the vision. At this stage it was more about how the vision was to be implemented. This included some very progressive policy changes, including stock for all employees and managers' bonuses being impacted by 360° Assessment surveys showing the degree to which their employees felt they were living the new values. At the end of this multi-year process, most of the 40,000 people of the bank felt some degree of connection to and ownership of the vision.

Not all engagement processes are so large or complex, but the principles remain the same at any scale. Here are a few tips on cascading engagement in visioning with organizations too large to all sit and talk together.

- Usually some leadership body takes the first steps in drafting the vision. This may consist of senior management and, depending on the situation, possibly some highly engaged Board members.
- It is advisable to:
 - include some representatives of staff, and/or
 - do interviews or surveys of staff prior to launching the visioning process, so the perspectives of staff are present in the room as leaders deliberate.
- Make clear what's on or off the table at each stage of engagement. In other words, when seeking input on the vision, it's important that people know what's open for discussion and what's already been settled. The failure to make this clear in advance is a recipe for frustration, disengagement and resistance.
- In large organizations, not all staff and other stakeholders may get the opportunity to directly impact the basics of the vision. But, there are still meaningful opportunities to engage with the visioning process due to many important questions about *how* the vision is to be implemented and the implications of the vision for every aspect of organizational life. These critical questions are best addressed by the people who have to live with the answers.

2. Engage the Heart

The tangible product of visioning is usually a written vision statement. But, as the story about the think tank shows, it's not only the words that are important. It's about passion and what makes people feel they want to go the extra mile. It's about energy. It's about people saying, "I'm all in." It's about people coming together in a deeply felt experience of collective intent and commitment.

The ideas are also important. We are laying down tracks for people to follow for years to come, and the distinctions we make matter. But, visioning deals with such deep human concerns as purpose and values. It needs to be an emotional as well as intellectual experience. We want to create space for the expression of people's deepest aspirations, as well as their frustrations and fears.

When people are struggling over particular language, it's often because the words represent deeply held feelings. Disagreements around vision often can't be resolved unless the deeper concerns are surfaced and addressed.

A community organizing group was shifting from working only on local issues, to a greater focus on state-wide work. They were making adjustments to the existing

Mission statement. The ED was pushing for the statement to be as short as possible, having read that this is considered ideal. However, there were strong objections to his proposal to take out the words “for our community.” This was not about wordsmithing and could never be resolved by a conversation around length of the Mission statement. The struggle reflected a lack of full agreement from some long-time staff around the new focus on state work and a lack of trust that the ED was as committed as his predecessor to serving the local community.

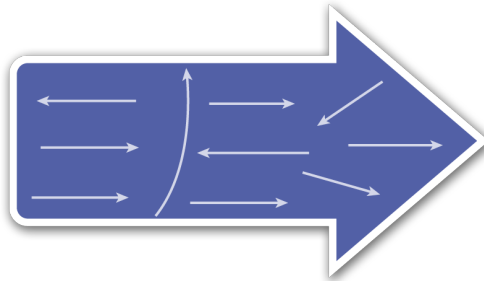
In visioning, we want to use methods, such as story-telling, and non-cognitive processes, such as art, music, poetry and drama, to engage the heart as well as the minds of those co-dreaming a future. Some groups mark the completion of visioning by creating a ritual of signing the vision.

3. Focus on alignment

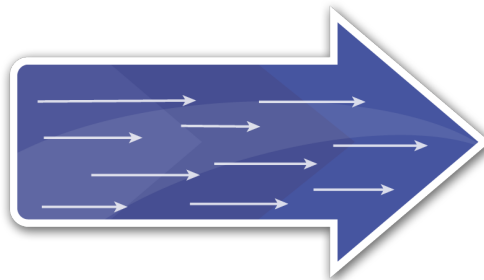
*“Building a visionary company requires 1% vision and 99% alignment.”
– Collins & Porras, *Built to Last**

A primary purpose of visioning is to harness the energies of divergent stakeholders into a coherent, focused and powerful stream of collective will.

From this:



To this:



We call this alignment, and it is a key practice in visioning.

Mission, Vision and Values are meaningful to the extent that people in the organization:

- share a similar understanding of what the words mean
- actually agree

- understand the implications for the work they do every day

Too often, visioning fails to fully meet one or more of these criteria. Here are a few tips in facilitating alignment:

- **Take time**

Despite good intentions, it's easy for people to walk away from having created a Mission or Vision statement with quite different understandings of what the words actually mean. Visioning is one of those processes that shouldn't be rushed. And while a retreat setting can be helpful in creating the focus and energy needed for visioning, it's advisable to let the work 'marinate' post-retreat then return after a break to reassess.

- **Test for understanding**

Unpack key words. Have people dig into what they really mean. An excellent exercise is to have each person stand before a small group and pretend they're communicating the vision to others who have not been part of the visioning. The group then gives the speaker feedback about their presentation. It's a great process for accelerating group learning and alignment.

For instructions on facilitating this process, see our tool: *Vision Stands*

- **Surface differences**

It is critical to surface any substantive differences around Mission, Vision or Values. There can be a tendency in visioning to avoid or paper-over potentially disruptive differences, especially as the potential consequences of irreconcilable differences in visioning are threatening. Staff may be especially hesitant to share concerns if leaders seem set on a particular path. Group pressure may discourage potentially important dialogues. Skillful facilitation may be needed to ensure people feel safe to raise concerns. Staff may sometimes need to discuss the vision without top leaders being present.

- **Resolve differences**

Too often groups try to deal with differences by including more and more ideas and words in an attempt to make everyone happy, and in the process watering down the meaning and power of the Mission, Vision and Values statements. For example, people may try to deal with having too many different values by stringing values together with conjunctions to avoid having to make a choice. Resist this! Lean into differences in visioning and deal with them – even when it's uncomfortable to do so. The purpose of visioning is to focus organizational energy, and this requires prioritizing and making clear choices.

- **Explore the implications**

Alignment is a dynamic process that requires not only understanding the new direction but demands that each team member grapple with the personal implications of the change. What will I actually have to do differently to bring this vision into being? We can't actually be fully committed and aligned to the vision unless we are prepared to implement it.

4. Avoid the rabbit hole of wordsmithing

The wording of Mission, Vision and Values statements is important. For years to come, these words need to serve as a guide for the organization, its strategic choices, and the actions of the people who work there. But, one of the most frustrating experiences of visioning is when groups of people get bogged down over nuances in wording. When the group starts to go down the rabbit hole of wordsmithing, either surface whatever concerns or disagreements lie behind the discussion of particular words or delegate resolving the exact wording to a few people.

Groups can do many things well. Writing is not one of them. The U.S. Declaration of Independence is a remarkable document. While the Continental Congress appointed a 5-person writing committee and everyone signed off on the final document, most of the work was actually done by one person – Thomas Jefferson.

Once there is basic convergence in the group, empower a few people with some skill in writing and passion for the task to do the wordsmithing. Let them take it to the next level, bringing it back to the larger group for feedback and, eventually, approval.

Shorter is better for all elements of visioning:

- A brief and powerful Mission statement...
that everyone can easily memorize.
- Enough detail in the Vision statement to bring the future to life...
but try to keep it to one paragraph.
- Hopefully, no more than 5 Core Values...
and no cheating by stringing values together.

The next three articles in this series are a guide to facilitating each of the components of visioning:

Visioning Toolkit #3: Facilitating Mission

Visioning Toolkit #4: Facilitating Vision

Visioning Toolkit #5: Facilitating Values

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Visioning = **Mission** + Vision + Values

The Mission of an organization articulates the *purpose* of the organization and defines the work that it will do to fulfill this purpose.

Purpose

Articulating Purpose is the first part of the Mission statement. Purpose is about our reason for being. Why are we here? What do we serve? What's worth working hard every day to achieve?

"Purpose is the reason an organization exists. Its definition and articulation must be top management's first responsibility. Every individual extracts the most basic sense of purpose from the personal fulfillment he or she derives from being part of an organization. If organizational ambition begins to focus on the company's narrow self-interest, it eventually loses the excitement, support and commitment that emerge when objectives are linked to broader human aspirations."

– Harvard Business Review

Mission statements should inspire people by calling forth that sense of purpose. They make clear what human needs the organization serves or how it impacts the world. For example:

Kiva.org is an organization that helps people lend money via the Internet to low-income, underserved entrepreneurs and students in 70 countries. Its Mission statement:

To connect people through lending for the sake of alleviating poverty.

Wellstone Action is the country's largest training center for Progressive leaders. Its Mission statement:

We ignite leadership in people and power in communities to win Progressive change.

Methods for Facilitating Purpose

To align people around a common purpose cannot be an intellectual exercise. Purpose is a quality of heart, a quality of soul. The work must go deep.

Sharing stories

I know of no better way to connect people to the deeper purpose of their work than through sharing stories.

I was facilitating a retreat for the leadership “team” of one of our major unions. The word “team” was a misnomer as there was very little trust and people did not feel joined in common cause. Right at the start of the retreat, I asked everyone to share a very personal story – a time when they felt their union was really fulfilling its purpose. People were asked to do their best to bring their stories to life – why it was so powerful for them and what their story said about the purpose of the union. A bit to their own surprise, the leaders showed up speaking deeply from their hearts about the impact of their work on real people. Jobs to raise families out of poverty. Standing together in hard times. Real people being empowered and ennobled. The spirit of whole communities being uplifted. Stories of power, of solidarity, of love. There was a lot of tough work ahead to forge a real team but, through their heartfelt stories, a powerful feeling of shared purpose was rekindled – a needed foundation for the journey ahead.

Appreciative Inquiry

A simple yet powerful way to engage people in connecting to purpose is a process drawn from the field of Appreciative Inquiry.¹ It can be facilitated with groups ranging in size from small work teams all the way to a ballroom filled with hundreds of people. Participants pair up and are asked to tell their partner a story about a time when they felt their organization was really living its purpose and expressing its greatness. People actively interview each other to help bring their stories to life, to explore exactly what about this story is so important to them, and what it suggests about the essential nature and purpose of their organization. Pairs then share their stories in small groups who, in turn, select especially powerful stories to be told to all those gathered.

The room starts to ring with passion, meaning, and joy. Around the room faces are filled with life and emotion. Eyes almost always begin to tear up, even in the most cynical of groups. Common themes begin to emerge from the stories, bringing into focus for everyone present the power, the essence and the purpose of the organization. From here, it is easy to capture key words to use in a Mission statement. But even more importantly, people *feel* their common purpose.

For complete instructions on how to facilitate this process, see our tool:
Appreciative Inquiry Process.

¹ **Appreciative Inquiry** (AI), also called strength-based or asset-based change, is a popular methodology mobilizing energy, commitment and direction for change by creating conversations with people throughout organizations about what’s working rather than a primary focus on shortcomings and problems. For more information, visit: <http://appreciativeinquiry.case.edu>

Reflecting on questions

Another way for organizations to explore the nature of purpose is through a process of inquiry, by asking such questions as:

- Why does our organization exist?
- What would the world lose if we didn't exist?
- What is the inherent value of our organization to others?
- Why is this important to me? Why do I care?
What here is worth investing so much of my life and energy?

A similar inquiry process invites us to ask the question "Why?" repeatedly. "Why is that important?" And then reflecting on the response, we ask again, "Why is that important?" We continue asking "Why?" until we land at what feels like the core purpose of the organization.

Some years ago, a telephone company was wrestling with the question of purpose for several hours, when they tried using the "Why?" process. The summary went something like this:

Why? Why do we do what we do?

We work to make telephones.

Why do we make telephones?

We make telephones so that people not in the same room can talk to each other.

(Note to today's users of smart phones: though we didn't think of our phones as "stupid" in those days, the only thing they could do was transmit voices.)

Why is it important for people to talk together?

This question lit up the room. At this point, people spontaneously started sharing stories – stories of parents and children living far apart being able to talk to each other on the phone, patients being able to talk to their doctors (yes, that used to happen), employees in remote locations being able to work together, lovers separated by distance being able to connect...

The word "connect" really caught on for people in the room. More and more examples of connection were raised. They finally chose to articulate their purpose as follows:

"Our purpose is to connect people to each other, supporting human relationships, facilitating productive work, and enhancing their quality of life."

Tips for Facilitating Purpose

Focusing on purpose is usually one of the easier and more enjoyable parts of visioning. The stories of purpose generate great energy, and the broad nature of purpose allows for different emphases and interpretations. There is rarely conflict, because at the level of purpose, different points of view can usually comfortably co-exist.

A few tips:

- Engage the heart. Interrupt the process if it becomes abstract or gets bogged down in wordsmithing.
- Purpose work lends itself to non-verbal processes such as personal journaling or art. For example, lay out lots of magazines to cut up and have people make a grand collage of pictures that represent to them the purpose of the organization.
- Make sure people are clear that purpose should be enduring – that it could last for many years, throughout changing social and political environments.
- There should be a personal element to working on organizational purpose. Encourage people to explore how this organizational purpose connects to their own sense of purpose in life. For example, if they were to tell their children or other loved ones what they do in the world, would they feel proud to share the organizational purpose? By aligning on organizational purpose, staff should come away with a deeper sense of personal meaning about the work they perform.
- Make sure that the purpose is authentic – a true expression of what the organization is actually all about.
- Working on purpose can be a good start to the process of visioning. Not only is shared purpose foundational, it's typically upbeat, energizing nature provides an energetic boost to the work that follows.
- Especially when there is dissension, frustration or low trust, aligning on purpose helps unite people by reminding them what they all care about.

From this foundation of shared purpose, we can look to define the work that will bring that purpose to life.

What is our work?

The second part of defining the Mission is to answer: What will we actually do to fulfill our organization's Purpose? What is our work?

Going forward, the Mission statement should be used to inform every major decision of the organization, team or project. *"Which choice brings us closer to achieving our Mission? And why?"* When resources are limited, you can use the Mission statement to help say "no" to interesting but off-target opportunities. A clear Mission statement is the basis for organizational focus, discipline, and strong performance.

Here are some possible criteria for a good mission statement:

- Helps fulfill the purpose.
- Creates a pathway to the Vision.
- Helps distinguish the organization from others in its sector.
- Is compelling and exciting. Right away, it grabs the attention of people in and outside of the organization
- Provides a unifying focal point for stakeholders; generates a sense of shared commitment.
- Clear – needs no explanation.
- Helps evaluate activities and set priorities for investment of resources.

- Challenges us to grow; pushes us to the edge of what we think is possible.
- Is short. (A study of Mission statements for 50 major US non-profits found an average length of 15.3 words.²)
- Is memorable. Many experts recommend one sentence. People throughout the organization should be able to easily memorize it.

Here are some good examples:

“Avaaz is a global web movement to bring people-powered politics to decision-making everywhere.”

“ISAIAH is a vehicle for congregations, clergy, and people of faith to act collectively and powerfully towards racial and economic equity in the state of Minnesota.”

The Center for Constitutional Rights is dedicated to advancing and protecting the rights guaranteed by the United States Constitution and the Universal Declaration of Human Rights.”

“Green For All is a national organization working to build an inclusive green economy strong enough to lift people out of poverty.”

Tips for Facilitating Mission

Ask questions that provoke thinking about Mission

Questions like:

- Who do we serve?
- What do we provide?
- What’s the benefit of what we provide?
- We are unique because...
- Our closest competitors are...
- What distinguishes us from them?
- What are we really good at?

Also try the negatives of some the above questions:

- Who do we not serve?
- What do we not provide?
- What are we not really good at?

² <http://topnonprofits.com/examples/nonprofit-mission-statements/>

The Mission statement needs to help guide and sustain us into the future. Ask groups to explore the trends that may impact the Mission over the next years:³

- The needs for our services: likely to increase, decrease, or stay the same?
- Economic indicators in the areas/sectors we serve: likely to increase, decrease, or stay the same?
- Available funding for our programs services: likely to increase, decrease, or stay the same?
- Political environment: likely to get more favorable, less favorable, or stay the same?
- Other relevant trends?

Find the right stretch

A good Mission stretches the sense of what's possible, inspiring imagination, innovation and full commitment. Mission statements should reach for what will really fulfill the purpose.

"The greatest danger for most of us is not that our aim is too high and we miss it, but that it is too low and we reach it."

– Michelangelo

But while it's possible to aim too low, it's also possible for missions to be so out of touch with reality that they cease to be credible. We want to strike the right balance between what is achievable and what is inspiring.

Focus on what you want – not only what you don't want

The climate change movement has struggled to create the needed political will in the U.S. Given the dire predictions of science, it's understandable that much of the messaging from environmental groups is fearful and focused on what we're trying to stop.

Mike Brune, ED of the Sierra Club, believed that the Club and the larger movement needed a positive mission – one that focused on a positive goal of what we can accomplish. He therefore reoriented much of the Club's capacity around a new mission:

100% Zero-carbon Electricity by 2030

This emphasizes the positive goal of clean energy vs. the oppositional focus of stopping all oil and gas production of electricity.

The Club's new mission also demonstrates another tip in creating Mission statements:

Be willing to define an inspiring, courageous meta-goal or target that focuses the organization's energy and excitement towards the Mission.

This has been called a **BHAG – Big Hairy Audacious Goal** – by Collins & Porras. The BHAG commits and challenges the organization to stretch to the edge of what seems possible.

³ The following questions adapted from the work of David LaPiana - <http://www.lapiana.org/>

The Center for Community Change (CCC) contains this BHAG in its Mission:

By 2020, CCC will have built powerful, grassroots movements in the United States that can empower everyone, particularly low-income people and people of color, to have enough to thrive.

Other best practices

The tips in *Visioning Toolkit #2: Best Practices* all pertain to creating Mission statements:

1. Seek maximum engagement
2. Engage the heart
3. Focus on alignment
4. Avoid the rabbit hole of wordsmithing

Taken seriously, creating the Mission statement is a defining moment for an organization. It is a declaration of who we are, and also who we are not. It affirms our essential purpose for existence, and commits us to the work we will do to fulfill that purpose.

“A small body of determined spirits fired by an unquenchable faith in their mission can alter the course of history.”

– Gandhi

For tips on how to facilitate the other two elements in visioning, see our articles:

Visioning Toolkit #4: Facilitating Vision

Visioning Toolkit #5: Facilitating Values

*This is the 4th article of 5 in the Visioning Toolkit series.
You can download the articles in this series, and other tools, at:
atctools.org/resources/tools-for-transformation*

Visioning = Mission + **Vision** + Values

The Vision statement paints a compelling picture of what the world would be like if the organization was successful in fulfilling its Mission. For example, in our previous article on Facilitating Mission, we looked at the **Mission** statement of Kiva.org:

To connect people through lending for the sake of alleviating poverty.

Kiva's **Vision** shows us the world they hope to create:

We envision a world where all people – even in the most remote areas of the globe – hold the power to create opportunity for themselves and others.

A Vision should stretch our sense of what's possible and inspire us to give ourselves to the challenging work of social change, year after year after decade.

Amnesty International:

Amnesty International's vision is of a world in which every person enjoys all of the human rights enshrined in the Universal Declaration of Human Rights and other international human rights instruments.

Save the Children

Our vision is a world in which every child attains the right to survival, protection, development and participation.

Methods for Facilitating Vision

Visioning is all about reaching past what seems possible today to create a dream of a better future.

However, when people in organizations try to think about the future, their imagination often runs into the wall of current "reality." Budgetary limitations. Unfavorable environment. Competition for resources. Well-organized opposition. Lack of public support. Lack of capacity. To facilitate dreaming, the visioning process needs to lift us past the obstacles of the present and literally time-travel us into the future: to see, feel, hear, smell and taste the future we want to create.

Future Travel Exercise

A simple yet very effective method of time travel is “guided visualization.”¹ In the Future Travel Exercise, people are invited to take an imaginary trip into a future where the organization has actually achieved its Mission. With eyes closed, through various prompts, we invite participants: to add more and more detail in their mind’s eye, to bear witness to the powerful impact of their work in the world, to take a walk through this future workplace and feel its generative power. People are encouraged to paint a vivid picture of their highest hopes for this work. At the conclusion of the visualization, people pair up as if they are meeting in an airport some years in the future. They interview each other about the great success of their organization and its work. The partners draw each other out with provocative questions like, “What was the big breakthrough, the turning point that really helped make this dream come through?”

For complete instructions on facilitating this exercise, see our tool: *Future Travel Exercise*

Magazine Article Exercise

This exercise is great for collective co-dreaming. Small groups are given the assignment to time travel “x” years into the future and collectively write the outline of a magazine article describing the success of their organization’s vision. The specs for the article typically include the title, the headline, the hot lead story, 3-4 bullet points about the success of the organization’s mission, a couple of photographs, and finally, a description of the big breakthrough or tipping point that led to success. Groups may also play-act a television news special rather than drafting a magazine article.

For complete instructions on facilitating this exercise, see our tool: *Magazine Article Exercise*

Both of these exercises consistently free up people’s imaginations as well as generate excitement and positive energy about new possibilities. Out of the vision-generating exercises, a small writing group can extract key phrases and images to begin to craft the vivid description. There’s work ahead, but these kinds of processes help organizations break through the barriers of the present and into a visionary future.

“When we stop dreaming about what is possible, when we stop imagining a world we all share that is guided by great feelings of love, we become our biggest barrier... The other world is something we must dream of, it must first be something we feel when we close our eyes and use our imagination...”

– Robby Rodriguez, Social justice leader

¹ For those unfamiliar with the technique, **guided visualization** (also called guided imagery or guided meditation) is a widely used process in which participants are invited by the guide to close their eyes. The facilitator suggests a series of scene and images, the details of which are filled in by those being led, creating an experience a bit like a waking dream. Guided imagery is used very effectively as a tool for relaxation and complementary forms of healing, as well as for accessing intuitive information and creative problem solving.

Tips for facilitating Vision

Watch the energy

The energy generated and released in visioning is almost as important as the content. Monitor the group energy through the visioning process. Do what is needed to keep the energy fresh, alive and creative: take breaks, use energy raisers, switch formats, break into small groups or dyads. But, don't keep pushing to generate an alive and exciting vision if the energy is tired or "off."

Tests for a good Vision statement

- Does it vibrate with a sense of the organization's purpose?
- Does it bring to life what it will really look and feel like to achieve the Mission?
- Can you see it? Does it use words that create a clear, vivid picture in the mind's eye?
- Does it use specific, concrete examples and metaphors that bring the vision to life, rather than generalities and bland platitudes?
- Is it worth what it would take to create it?
- Is it what people *really* want?
- Is it inspiring – filled with passion, intensity and conviction?
- Does it motivate people to give it their all? Are people willing to fully commit to it?

Other best practices

The tips in *Visioning Toolkit #2: Best Practices* all pertain to creating Vision statements:

1. Seek maximum engagement
2. Engage the heart
3. Focus on alignment
4. Avoid the rabbit hole of wordsmithing

The Vision statement is an extraordinary opportunity for an organization and its people to dream and claim the world they are dedicated to bring into being. The Vision becomes like a North Star, guiding the organization to fulfill its Mission.

For tips on how to facilitate the other two elements in visioning, see our articles:

Visioning Toolkit #3: Facilitating Mission

Visioning Toolkit #5: Facilitating Values

*This is the 5th article of 5 in the Visioning Toolkit series.
You can download the articles in this series, and other tools, at:
atctools.org/resources/tools-for-transformation*

Visioning = Mission + Vision + **Values**

Core values are the fundamental principles by which organizations live and fulfill their Mission and Vision.

Many organizations have lists of values on their website or in their annual report. But, few of these organizations have core values that are actually used as active tools to shape organizational culture, inform all major decisions, and guide its destiny.

Articulating the core values of an organization is about discovery – not invention. It's not about writing lists of the values people think their organization should have. The values "creation" process is about uncovering and giving voice to those true values that already exist in the organization, that are the soul and essence of its greatness.

"Before you tell your life what truths and values you have decided to live up to, let your life tell you what truths you embody, what values you represent."

– Parker Palmer, Let Your Life Speak

The Process of Articulating Values

We typically guide groups through the following three steps:

- Step 1. Generate the list of core values
- Step 2. Define the values
- Step 3. Translate the values into behavior

For a complete guide to facilitating values creation, see our tool:

Values Creation Exercise

Step 1: Generate the list of core values

- Individuals separately generate their own list of the organization's core values.
- Small groups cluster and work to reach agreement on their shared list of values.
- Depending on the size of the group, there may be report-outs and other steps to synthesize the final list of values.

At this point, there will be a list that looks something like:

- Justice
- Courage
- Respect
- Collaboration

- Accountability

This is a good start, but these 5 words, while lovely, are generic and undefined. Different people will likely have very different understandings of what these words mean. Justice might mean one thing to a group working on the school-to-prison pipeline, but something altogether different for a group pushing to hold accountable Wall Street violators of ethics laws.

Step 2: Define the Values

For values to be meaningful and useful, they must be defined specifically in the context of the organization's Mission.

The above list of values actually comes from OneAmerica, a Seattle-based organization whose **Mission** is:

To advance the fundamental principles of democracy and justice with a particular focus on building power in immigrant communities.

Here's how OneAmerica defined their **Values** as they relate to their Mission:

- **Justice:** *Ensuring equal access to power and opportunity, supporting and defending the rights of all people, and eliminating discrimination and oppression.*
- **Courage:** *Standing up to power, speaking truth, challenging injustice and acting with conviction and integrity.*
- **Respect:** *Listening to, acknowledging and valuing multiple perspectives and positions, and fostering understanding and empathy through dialogue.*
- **Collaboration:** *Providing opportunities for diverse groups to come together, be heard and take collective action.*
- **Accountability:** *Adhering to our mission, vision and values in an approachable, inclusive and transparent way.*

Step 3: Translate the values into behavior

The final step in values work is to test how the values might play out in daily organizational life. What behaviors would we expect and support, and what behaviors would be inconsistent with our values?

For example, for the value of courage we might expect to see behaviors like:

- Being willing to disagree or question those with more power when you believe it's in the organization's interest to do so.
- Step up to make hard choices.
- Raise questions and valid concerns around power and privilege in the organization.
- Go directly to people with interpersonal issues that impact work.

Some examples of behavior not in alignment might be:

- Hanging back and watching things unfold rather than voicing an idea or opinion that may be unpopular.
- Not being forthcoming about your mistakes or failures.
- Complaining about others rather than going to the person.

In case it's not clear, Values are meant to guide both the internal culture and external work of organizations.

For example, one of the values of the Southern Coalition for Social Justice is:

Eliminating structural inequality.

And one of their explicit behavioral descriptors is:

We do not represent people in routine divorce cases or handle traffic tickets, unless, for example, there are racial profiling issues.

Tips for Facilitating Values Work

Working on values has a different feel than the upbeat, expansive energy of dreaming a Vision. People need to be thoughtful, taking care with the words, more willing to stop to clarify, and more willing to lean into nuances and disagreements.

Here are some best practices:

1. Test core values

Make sure the values are really core values. Here are some of the tests suggested by Jim Collins,¹ co-author of the classic book *Built to Last*.

- Would you want your organization to continue to hold fast to this core value, even if it was detrimental to its finances?
- Would you want the organization to stand for this core value 50 years in the future, no matter what changed in the external environment?
- Would you want your organization to hold this core value, even if at some point in time, it became a competitive disadvantage – even if in some instances, the environment penalized the organization for living this core value?
- Would you leave this organization rather than give up this value?
- Should individuals who do not share this value, and violate it consistently, not be a part of this organization?

“If you don't stick to your values when they are being tested, they're not values – they're hobbies.”

– Jon Stewart

2. Encourage clarity and real agreement

In Values work, we want to make sure each word is the right word and that people agree what it actually means. Groups frequently back away from potential disagreements, or decide prematurely that things have been sufficiently hashed through. If used well, Values will be brought out again and again for guidance at critical junctures in the life of the organization. They may need to inform diverse people in remote locations. So, the exact words of a values statement are very important.

¹ <http://www.jimcollins.com/tools/vision-framework.pdf>

3. Push for real choices

There is a tendency in this process to avoid making real choices by:

- Creating too many core values. Experts generally recommend 5 values as a maximum, but definitely no more than 7. (Research has shown seven to be the maximum amount of different items we can hold in working memory.²)
- Trying to include too many suggestions by stringing a number of values together with conjunctions.

4. Set the stage for follow-up

At every step of the process, reinforce the expectation that these values are going to be an important part of the organizational culture. Follow-up steps typically include:

- Ongoing work to translate the values into practicable behaviors.
- Continued engagement and learning about the values and what they mean. For example: choosing one value each month to discuss and study.
- Building in accountability, such as:
 - evaluation of teams regarding their implementation of the values
 - feedback to individuals
 - making the values part of performance evaluations, etc.

Going forward

You can't get people to "buy in" to values. People are predisposed to certain values or not. To build a robust values-based organization, you must attract and retain those people who are aligned with the organization's Core Values, and ultimately let go of those who are not.

Everything else in an organization may change or evolve over time – strategies, systems, policies, structures, even the Mission – but Core Values endure.

Values are the essence, the very DNA of an organization, and the key to its greatness.

"Life is a series of compromises. And compromise is all right, as long as your values don't change."

– Jane Goodall

² Based on a famous study in 1956 by cognitive psychologist George A Miller of Princeton, sometimes called Miller's Law.