

*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