

*This is the 3rd 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 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