

# VISION STATEMENT CRITERIA

**Audacious:** Your vision represents a dream that's beyond what you think is possible. It is the mountaintop your organization is striving to reach. It takes you out of your present reality and constraints.

**Rooted in existing assets:** Your vision builds on where your organization stands today: its history, supporter base, strengths, unique capabilities, resources and programs. It should also encompass what you'll continue to establish as you work toward your mission.

**Futurecasting:** Your vision provides a picture of what your organization will look like in the far-off future, which forces you to make some educated predictions and assumptions.

**Inspiring + Motivating:** Your vision engages with language that inspires. It creates a vivid image in your stakeholders' minds that provokes emotion and excitement, while posing a challenge. Your vision clarifies the direction in which your organization needs to move and keeps everyone pushing forward to reach it.

**Purpose-driven:** Your vision gives employees and other stakeholders a larger sense of purpose, so they feel as though they're building a cathedral instead of laying stones.

**Clear:** Your vision uses precise, everyday language and avoids ambiguity or hyperbole.

# VISIONING QUESTIONS

What is the reason you exist?

What makes you happy?

What are your core organizational beliefs?

Where have you come from?

What do you want to achieve with your actions?

What experiences have shaped you?



# THE GOLDEN CIRCLE - Why, How, What Analysis

The golden circle was developed by Simon Sinek and is a framework that helps individuals, teams, and organizations articulate their purpose or their “why”. Why is the purpose, cause, or belief that guides you, your team, or your organization.

## Why

Why = Vision

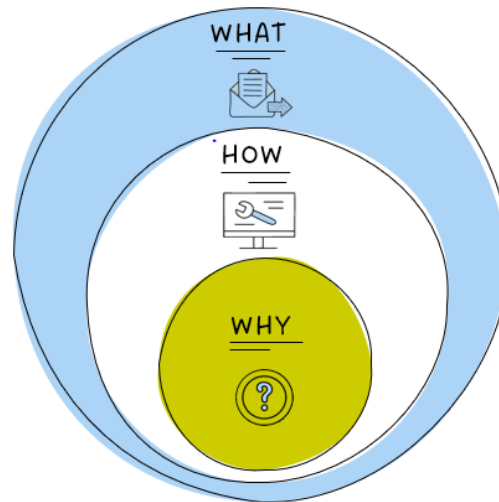
- What makes you happy?
- What do you want to achieve with your actions?
- Where have you come from?
- What experiences have shaped you?

## How

How = Values

How is the ways you operate or the things you do that set you apart or make you special. These might be related to your brand, your staff, your products, operations, or services. Some questions to ask:

- How are you different from other organizations?
- How do you create relationships with your customers/clients?
- What behaviors do you need to reach your future state?



- What do other people need from you? How do you fulfill those needs?
- What is the reason you exist?
- What are your core organizational beliefs?

## What

What = Mission

Lastly it is time to articulate your mission.

- What are our products or services?
- Who do we do it for?
- How do our products or services make a difference for our customers/clients?
- What makes us different from other agencies?
- When have we seen our mission in action?

*"People don't buy what you do, they buy WHY you do it."*

## STEPS FOR WHY, HOW, WHAT ANALYSIS

1. It is recommended that you begin by having those completing this exercise watch Simon's 18-minute Ted Talk [Start with why -- how great leaders inspire action | Simon Sinek | TEDxPugetSound - YouTube](#)
2. Next, start by identifying *your* “why”. Use the questions above as you work to articulate your why.
3. After you have identified your why, identify your “how.”
4. Lastly, identify your “what.”

# VISION STATEMENT VALIDATION

**Thinking about our vision, rate each statement on a scale of 1-5 (5 being the highest/positive) and then answer the follow-up questions:**

Does our vision statement define what kind of organization we want to be in 3-5 years?

1 2 3 4 5

If you rated a 3 or below, what could make our vision statement stronger?

Does our vision statement inspire and energize you?

1 2 3 4 5

If you rated a 3 or below, what could make our vision statement more inspiring or energizing?

Does our vision statement help us be creative and innovative?

1 2 3 4 5

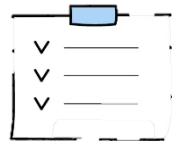
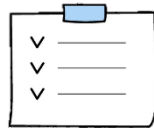
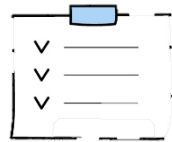
If you rated a 3 or below, how could we make our vision statement stronger so that it provides a direction to focus creativity and innovation?

# THE HEART AND HEAD TEST



TIP: Start with the heart as the thinking naturally comes later and puts an end to the emotion.

What do you feel?



HEART



What do you think?



HEAD

# MISSION STATEMENT CRITERIA

**Based on core competencies:** It reflects what your organization is good at, not just its future aspirations.

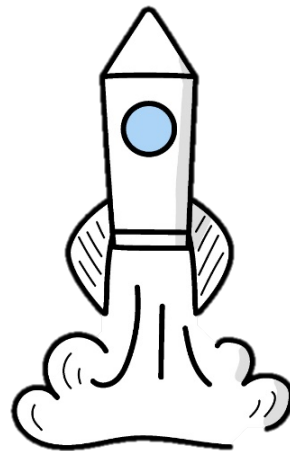
**Realistic:** It can conceivably be achieved in the not-too-distant future.

**Focused on the present:** It defines what you will do *today* to reach your vision in the future.

**Tactical:** It focuses more on how you make a difference than why (leave why to your vision).

**Unique:** While two organizations can have very similar visions, no two should have the same mission.

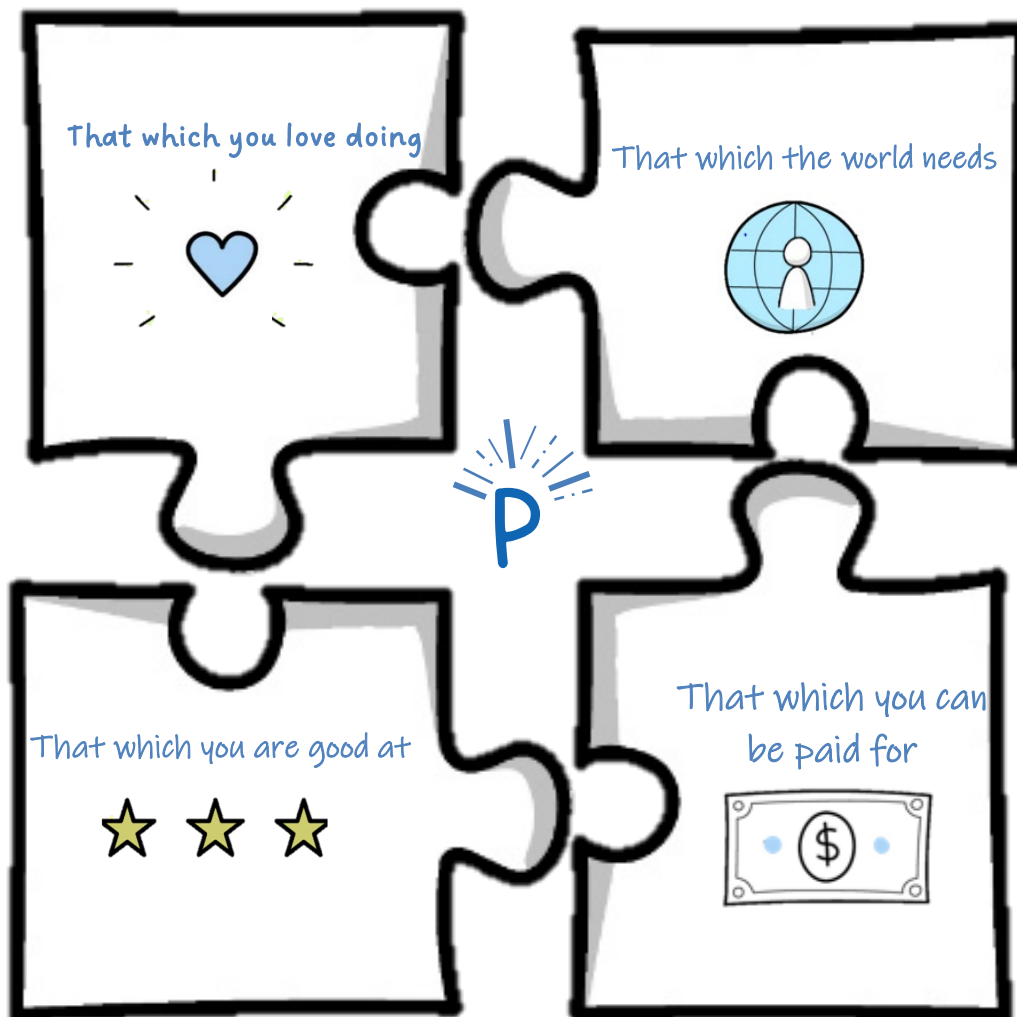
**Specific:** It describes a particular change your organization is working to drive in no uncertain terms.



# MISSION DEVELOPMENT TEMPLATE

This exercise helps identify the key elements that your mission statement should contain. It helps to drive innovation which is a critical factor for your organization in retaining talent.

The purpose of you or your organization can be found where your answers to all four questions meet.

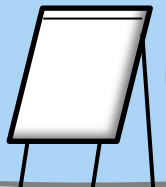


## HOW TO USE THIS TEMPLATE

1. Start by working out answers to the 4 different questions in the separate boxes.
2. Next identify the themes that emerge between each box
3. Lastly, review the themes from the intersections and draw out your purpose

## FACILITATION TIPS

- ✓ Don't wordsmith in a group. Ask your best writer to draft some statements to review
- ✓ Use a whiteboard (Teams, Mural, Miro) and have participants answer each of the four questions individually by putting their responses on virtual sticky notes for each question. Then collaborate as a team on what themes emerge



# MISSION STATEMENT VALIDATION

**Thinking about our vision, rate each statement on a scale of 1-5 (5 being the highest/positive) and then answer the follow-up questions:**

Defines what your organization does for your customers?

1 2 3 4 5

If you rated a 3 or below, what could make our mission statement stronger?

Staff can see how their work connects to the mission?

1 2 3 4 5

If you rated a 3 or below, what would make our mission statement more relatable?

Does our mission statement foster customer engagement and public perception?

1 2 3 4 5

If you rated a 3 or below, how could we make our mission statement more engaging?



# CULTURE CHANGE MODEL

Keep	Remove	Grow
<b>Belief</b>	<b>Belief</b>	<b>Belief</b>
<b>Behavior</b>	<b>Behavior</b>	<b>Behavior</b>
<b>Action</b>	<b>Action</b>	<b>Action</b>

Example: Building a Culture of INNOVATION

Keep	Remove	Grow
<b>Belief</b> We are creative	<b>Belief</b> We are risk averse	<b>Belief</b> We are willing to take intelligent risk
<b>Behavior</b> Staff provide out of the box ideas	<b>Behavior</b> We say "we can't do that"	<b>Behavior</b> We take all ideas seriously
<b>Action</b> Create an idea board for staff to submit their ideas	<b>Action</b> Stop shutting down ideas	<b>Action</b> We have an unbiased process to evaluate all ideas

# VALUES VALIDATION

Thinking about our values, on a scale of 1-5 (5 being the highest/positive) rate the following:







VALUE & DEFINITION	CRITICAL TO REACHING VISION?	ACCURATE DEFINITION?	YOUR ABILITY TO CONNECT
EX: <b>Accountability:</b> We drive impact, work in collaboration, and deliver meaningful outcomes with honesty, fairness, and transparency.	4	5	4

Scores of 3 or below should be discussed.

# STRATEGIC PRIORITIES TEMPLATE

This template helps you visualize all of your strategic priorities as if you have already achieved them. Thinking about your organization and operations - what problems have you solved?

**IMAGINE** it's 5 years from today... ↓

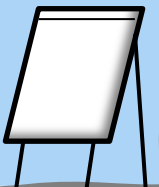
 <p>employees</p> <p>How are staff behaving differently?</p>	 <p>stakeholders</p> <p>What relationships have you built?</p>	 <p>customers</p> <p>How do you now serve customers?</p>
 <p>community</p> <p>What are people saying about you?</p>	 <p>organization</p> <p>What problems have been solved?</p>	 <p>operational excellence &amp; innovation</p> <p>What specific improvements have been made?</p>

## WAYS TO USE THIS TEMPLATE:

1. You can use this template to establish priorities for any of these six areas. Starting with your vision, answer the questions with the intent of "how" your statement would help you reach your vision.
2. You can use this template to create your individual, team, or organizational purpose or vision by answering these questions and then distilling down the responses to overarching themes. Next, create a vision summary statement.

## FACILITATION TIPS

- ✓ Don't wordsmith in a group. Ask your best writer to draft some statements to review.
- ✓ Run this exercise using the Liberating Structures 2-4-All exercise.



# STRATEGIC PRIORITIES VALIDATION

Thinking about our strategic priorities, rate each statement on a scale of 1-5 (5 being the highest/positive) and then answer the follow-up questions:

**Operations & Performance:** *(Your strategic priority statement here)*

Critical to organizational success?

1 2 3 4 5

Helps us achieve our vision?

1 2 3 4 5

Addresses themes from staff input?

1 2 3 4 5

**Customers:** *(Your strategic priority statement here)*

Critical to organizational success?

1 2 3 4 5

Helps us achieve our vision?

1 2 3 4 5

Aligns with customer needs?

1 2 3 4 5

**Partners and Stakeholders:** *(Your strategic priority statement here)*

Critical to success?

1 2 3 4 5

Helps us achieve our vision?

1 2 3 4 5

Addresses themes from partner input?

1 2 3 4 5

**Employees:** *(Your strategic priority statement here)*

Critical to success?

1 2 3 4 5

Helps us achieve our vision?

1 2 3 4 5

Addresses cultural competency?

1 2 3 4 5

# OBJECTIVES AND KEY RESULTS WORKSHEET

(Your Organization Here)				
Strategic Anchors Values	Vision Mission	Excellent Customer Service, Innovation, Respect		
Goal (your S.M.A.R.T.I.E.. Goal here)				
Hypothesis: If INSERT S.M.A.R.T.I.E. GOAL HERE we will INSERT OUTCOME HERE (this might be your strategic priority)				
If we do this... (Objective)	Specifically, by...(Output)	As measured by... (Output Measure)	Then the outcomes will be...	As measured by.. (Outcome Measure)
EX: Make our website more user friendly	Making our application easier to find on our web site	<ul style="list-style-type: none"> <li>10% increase in web traffic from 200 hits in 2022 to 220 hits in 2023</li> </ul>	<ul style="list-style-type: none"> <li>Increased accessibility to services</li> </ul>	<ul style="list-style-type: none"> <li>10% increase in service usage</li> </ul>
Update our aging system	By hiring 3 new staff to convert our files	<ul style="list-style-type: none"> <li>A new system is in place by 3/31/2023</li> </ul>	<ul style="list-style-type: none"> <li>Staff can do their work faster</li> </ul>	<ul style="list-style-type: none"> <li>10% increase in processing applications within 2 days.</li> </ul>