**Developing Mission, Vision, and Values for the Organization**

To be effective, all organizations must have a *purpose* that is important and shared by staff within the organization and clients and other stakeholders external to the organization. The purpose defines the day-to-day tasks of the organization as well as the resources needed to perform the tasks.

The first step in defining the purpose is developing, communicating, and using day-to-day a *vision*, *mission* and set of *values* the organization can aspire to. Vision and mission help everyone internal and external to the organization understand the impact of the organization’s work on clients served and the society at large. Values help everyone know the behaviors all internal staff members are expected to exhibit while performing their work.

A vision is a statement of a desired future state for an organization and society at large. (Slide 2) A mission is a statement of what an organization does to help make the vision come true. (Slide 3) A mission helps an organization communicate its purpose and stay focused as it makes decisions regarding policy shifts, hiring patterns, etc. Values are a set of principles and philosophical approaches to an organization’s work. (Slide 4) Values let employees know the underlying beliefs of the organization and behaviors that are expected of them.

In APHSA’s experience, vision, mission, and values work trips up many organizations. While many organizations develop written statements of some kind in each of these areas, few do a good job of communicating them throughout the organization and the community as well as using them day-to-day through such activities as:

* Being inclusive when developing and/or updating a vision and mission for the organization, obtaining input from internal staff and key stakeholders on their aspirations for the organization;
* Defining the specific behaviors expected from staff and senior leaders associated with each core organizational value using an inclusive process that includes internal staff at all levels of the organization;
* Presenting new staff with copies of the vision, mission, and values statement early in their orientation to the organization and discuss how the new staff persons role supports the vision and mission and what the values look like in day to day performance;
* Having written copies of vision, mission, and values statements for reference at each executive team, and work team meeting;
* Referencing vision, mission, and values when making major organizational decisions;
* Citing vision, mission, and values explicitly in organization-wide communications, for example, when explaining shifts in policy or practice or announcing a major new hire; and,
* Sharing vision, mission, and values statements when communicating with external stakeholders and the public at large.

Constant change in the environment demands regular revisiting of human services organizations’ senses of purpose. Larger social and political forces in society require that organizations regularly revisit their vision and mission statements and contributions to families and communities. “Fit”within the larger environment assures that basic values held by individuals within the organization are expressed operationally and decisions regarding policy shifts, hiring patterns, etc., are made from a mission focus. In addition, the core values of the members of the organization are affirmed and supported.

Communicating the vision, mission, and values to both internal and external stakeholders and routinely monitoring and evaluating everyone’s understanding provide clarity and determine if everyone is in agreement with the direction of the organization. Both fit and clarity lead to commitment of all key stakeholders to act in ways that fully bring to life the vision, mission, and values in day-to-day practice. (Slide 5)

When facilitators of continuous improvement efforts become aware that an organization lacks a vision, mission, and/or value set; has not communicated them to internal and external stakeholders; and/or, has not monitored and evaluated them for fit, clarity, and commitment, facilitating a team activity in this important area of work can result in improved effectiveness for the organization.

The important thing is for teams to recognize how fit, clarity, and commitment of the vision, mission and value set impact the culture of the organization and ultimately outcomes for clients. Identifying gaps in these areas and planning for improvements to how the organization functions in alignment with vision, mission and values are likely to have positive impact on retention of staff and outcomes for clients.

The facilitator can use the Vision, Mission, and Values Team Activity and power point slides on the following pages to facilitate a team through a mini-DAPIMTM resulting in quick wins and longer term improvements.

### **Team Activity: Developing Vision, Mission, and Values**

1. Start by asking the team to share any current vision, mission, and values statements. If they exist, the team activity will focus on the fit, clarity, and commitment of current statements. If they do not exist, the team activity will focus on developing statements. Either way, the same type of questions can guide the work.
2. The team should start by discussing the current vision for the organization. A vision statement is a statement of a desired future state for the organization and the community. The team should use the following questions to reflect on vision statements:
   1. When you dream, what is it that you see?
   2. Does your vision inspire people and create the interest in changing?
   3. What would cause others to rally around your vision?
   4. Who was involved in developing the vision statement?
   5. Who should be involved and/or have input?
   6. Who does this statement impact?
   7. What would cause others to rally around your vision?
   8. What is your vision for your community?
   9. Who will need to have fit, clarity, and commitment to the statement?
3. After reflecting on these questions, the team should develop and/or make revisions to the current vision statement, ensuring that it is a statement of their desired future state.
4. Next, the team should discuss the mission of the organization. A mission statement is a statement of what the organization does to help contribute to making the vision come true. The mission statement must fit within the larger environment and have clarity and commitment from staff within the organization in order for the organization to achieve successful outcomes.

The mission allows the organization to maintain focus on its purpose and helps guide decisions regarding policy shifts, hiring patterns, etc. The team should use the following questions to reflect on its mission statement:

* 1. Does your mission light a fire in the hearts of those who must carry it out?
  2. Did they play a role in its development?
  3. Is this mission statement brief (3-5 simply stated sentences)?
  4. Does it tell who benefits – who your customers are?
  5. Does it tell what is going to be done?
  6. Does it tell the “how” – the methods, strategies & values that will be used to produce the results?
  7. Does it describe comprehensive outcomes?
  8. Is it clear and have the same meaning to everyone?
  9. Is it compelling and does it inspire commitment?
  10. Is it memorable and can it be memorized easily?

1. After reflecting on these questions, the team should develop and/or make revisions to the current mission statement, ensuring it works as a statement of the desired future state.
2. Next, the team should reflect on its values. Values are a set of principles and philosophical approaches to your work. Values let employees, clients, and other external stakeholders know the underlying beliefs of the organization and behaviors that are expected of them within the organization. The team should use the following questions to reflect on values statements:
   1. How are staff expected to conduct themselves day-to-day?
   2. What values would you like staff to demonstrate as they make decisions?
   3. What does not change regardless of resource level or changing approaches?
   4. If you have values statements, how did you develop them?
   5. Who was part of the discussion and who should be part of the discussion now?
   6. What must you do to show your commitment to those values?
   7. What must you do to drive those values throughout the organization?
3. After reflecting on these questions, the team should develop and/or make revisions to the current value statements. The team should identify and behaviorally define the values.
4. Once the team has come to consensus on vision, mission, and value statements, it should reflect on whether the statements accurately define “*Who the organization is, and why?”* The team should assess the implementation of the statements by reflecting on the following questions:
   1. How do they impact the work that happens in the organization?
   2. How do you communicate them? In and out of the agency? In the community?
   3. How do you put them into action, inside and outside of the agency? In the community?
   4. Does the mission statement fit current operations, practice, and goals?
   5. Is there general agreement among staff regarding the relevance of the mission?
   6. How have you anchored these values in specific behaviors that you would observe when they are being demonstrated? How were these behaviors described and communicated to staff?
   7. Are the behaviors described in the values used for assessing staff performance?
   8. Are the behaviors described in the values used as potential measures when hiring or promoting staff?
   9. How are people accountable for working in alignment with them?
   10. How do you link your vision/mission/values to initiatives, outputs, and outcomes?

If the team feels comfortable with the content of the values but feels that further operational definition of the values is needed to embed the values into practice, continue with the following steps:

1. Discuss with the team a time when the values were demonstrated through the actions of a team member (or the group you are looking to define the actions for such as “supervisors” or “managers”
2. Without laying blame or pointing fingers discuss a time when a team member did not display the values in their work. A self selected volunteer who is willing to speak about their own behavior is the best way to discuss this topic
3. Once behaviors have been discussed in real world terms, break the CI team into small groups and assign each group a value or set of values to work on for the activity. Use the attached template to help the group create 3-5 behaviors that demonstrate the value operationally.
4. Ask each small group to describe their assigned values in operational terms, listing out actions team members should do that are specific and observable behaviors that theoretically demonstrate the value
5. Have each small group develop a set of “markers”, specific and observable outcomes that would be expected if the behaviors (actions) listed in step 12 were followed
6. Report out each of the small group’s work with the larger group, seeking feedback and adjusting the content for group agreement/consensus
7. Develop consensus for the content in the operational definitions of the values.
8. If appropriate, begin “mini-DAPIM” using the new definitions as the Desired Future State, listing out strengths and gaps as follows:
   1. Identify strengths and gaps in putting the vision, mission, and values to work in guiding day-to-day tasks and decision-making in the organization. Identify possible root causes of implementation challenges, then identify possible remedies for the gaps identified, particularly identifying how the team can build on its strengths to overcome the gaps.
   2. Plan and implement rapid improvements that can be implemented right away to produce quick wins. Clearly identify how the improvements will be monitored. *(Use the Tracking Rapid Improvements tool from Section Two of the OE Handbook to chart the rapid improvements agreed to by the team, this will allow for monitoring of the agreed upon commitments.)*
   3. Plan for longer term improvements for which implementation of written improvement plans and/or charting teams might be required. For example, should a charter be developed for defining the values in behavioral terms? Be sure the team considers how to communicate the improvements being made to support the vision, mission and values in the workplace. As part of the planning process, be sure the team has identified how to implement and monitor the improvements and make adjustment to ensure the building of a culture that is focused on vision, mission, and values.