The Pillars of Planning: Mission, Values, Vision
by Don Adams

His inability to grasp "the vision thing" was an important part of George Bush's undoing in the '92 election; but he's not the only one to have a hard time articulating wishes and dreams for the future. In over twenty years of consulting with organizations of every stripe, I've seen again and again how groups are brought to crisis by conflicts over basic issues of mission, values, and vision. Without these basic agreements in place, no organization is truly viable.

Mission, values, and vision are the glue that holds an organization together. They describe what you're trying to do, how you want to go about it, and where you're headed. Knowing these things helps to keep your organization on track. It gives you a yardstick you can always use to measure your present performance and plans against your aspirations.

They also sound abstract, new age, and downright jet-puffed to a lot of people, especially those who are burning to move forward with a real-world project, and don't want to hang back jawboning about people's wishes and dreams. Many people who style themselves as "pragmatic" get away with skipping over this important stage of building a strong foundation of consensus for their organizing. If you don't take the time to articulate mission, values, and vision on the front end, you'll pay for it later.

In our consulting practice, we're often called in to work with organizations when their staffs or boards are locked into what are described as "personality conflicts." A little exploration reveals not irreconcilable personalities, but real differences on issues about governance, finances, purpose and program. The contenders' personal styles and entire beings have come to stand in for unresolved tensions concerning mission, values, and vision. John is a compulsive organizer; he's worried about taking risks, especially financial risks. Lisa is spontaneous and improvisatory; she's worried that the organization will lose its soul by pinning everything down. Each has collected a little camp of supporters, and every issue that comes up is ammunition in their competition. No one is talking about the deeper questions this competition obscures: what they want to accomplish as an organization, and what measure of risk-taking and improvisation are appropriate to that mission and their values. At this stage, it takes extraordinary time and effort -- and no small measure of mutual forgiveness -- to get the organization back on track again.

The time to articulate mission, values, and vision is now - at the outset of an organization's life, if possible, and at the first opportunity if the organization is already underway. Each element has its distinct characteristics and role in organizational life:

- MISSION is the raison d'etre for your organization, why it exists. The original founders' intentions - what they wanted to achieve by starting the organization - must be reexamined and refreshed periodically if an organization is to remain dynamic.
- VALUES manifest in everything you do as a group, not only your public programs, but also how you operate. For instance, one organization may identify access as a primary value; when they plan programs, they think foremost about how to remove the barriers and encourage the widest possible participation. Another group might value quality of artistic performance above all else; when they assign budget priorities, they opt for

artistic expenditures above all others. Articulating values provides everyone with guiding lights, ways of choosing among competing priorities and guidelines about how people will work together.

- VISION is what keeps us moving forward, even against discouraging odds. For example, a media-literacy group may envision a nation where every child knows how to talk back to television. Vision is the most powerful motivator in an organization. If it's vivid and meaningful enough, people can do astounding things to bring it to realization. But if it's lacking, no amount of resources will be able to get people off their butts.

Most people can relate to a personal vision, their personal values, their mission in life. But when two or more people agree to work together, the difficulties of arriving at such articulations multiply. When you want to bring new people in, you must give them ways to participate in the vision of the organization. Everyone's preferences and abilities must be taken into account for a group to work together optimally. What this means practically is that group members need focused opportunities to exchange ideas and make decisions about group mission, values and vision.

Exploring and agreeing on fundamentals of purpose and process most often takes place in face-to-face group meetings, through facilitated discussion. One way to focus such a meeting is to lead a "guided fantasy" of the group's activities five or ten years down the line, then discuss the ideas it brought up and have a working group prepare a draft after the meeting, summarizing the results. Doing an exercise like this can encourage people to develop their visions, loosening imaginative powers rather than falling into a polarized argument. Many other approaches are also possible, such as:

- A series of interviews, posing questions on mission, values, and vision to all the key people, then writing up their responses and circulating them as a foundation for group discussion;
- Asking each individual to complete a survey or write up a personal statement, then circulating the results to help define the range of people's thinking;
- Asking individuals with strong ideas to write up a series of short discussion pieces exploring themes and proposing solutions; or
- Using media -- video or audio interviews, or other community arts techniques -- to "draw a picture" of the activities and end-results people imagine, then exhibiting the results at a meeting.

On the grandest scale, a group with the large ambition of serving the entire community can enlarge the process by inviting a wider public to contribute to their vision through community meetings or arts events. Using methods such as those listed above can bring more people into the envisioning process, demonstrating the organization's commitment to listening.

Not everyone approaches articulating mission, values, and vision in the same way. It's important to recognize and respect diverse approaches to questions of ultimate purpose in a group. Some are fired with a passionate vision of something specific that needs doing. Others have a more general view of how they'd like the future to look, and more tentative notions about how to get there. Still others do best at identifying and analyzing problems and working through to

solutions. Others may be motivated by the desire to work with people they respect or admire, or to get to know new people with whom they share interests. Different ways of defining a group's mission and values may seem foolish or even alarming to some organizers; but organizations are strongest when many aptitudes, interests, and points-of-view can pull together.

Since questions of mission may evoke differing bedrock assumptions, discussing them can be complicated. Participants in such discussions must be aware of many considerations:

- THE GENERAL AND THE SPECIFIC: There's room for both general-purpose and specialized projects in the pantheon of community organizations. General aims - such as making our community a better place through the arts -- may bring more people of diverse interests together, leaving room for many things under the organizational umbrella. But highly specific goals - conducting a high-quality dance school and sponsoring two performances a year - can help keep a valuable activity going for years. It's important to sort out such basic issues of organizational focus early, before a lot of time has been invested by people with significantly different aims who might feel burned later on.
- DEALING WITH SYMBOLIC CONFLICT: Red-herring questions have polarized and short-circuited cultural development discussion for decades. How many hours of agonized twisting in one's seat have been wasted on the false dichotomy of "quality versus community," to cite just one example? If you find people standing off like stags on either side of some conceptual clearing, pause and ask what else might be going on beneath the surface. "Quality versus community" most often masks a conflict over resources. Group members who find themselves facing such symbolic conflicts should ask, "What are we really concerned about here? What might our group do to pursue quality that could harm community participation? What might our group do to pursue participation that might harm quality? Do we have a vision of an organization that can work on both of these at once?" Don't let polarized theorizing break down group consensus. Instead, try to enlarge the group's vision so that consensus may be maintained.
- "SURROGATE" ISSUES: Symbolic or theoretical dispute may be hiding concrete conflicts over organizational turf, budget priorities. Who will be president? Who will choose the programs? When you see issues and dynamics such as these arising in discussions of mission and vision, point this out and agree to take up these practical questions later in the planning process, refocusing fellow group members on the task at hand.
- MAINTAINING FORWARD MOMENTUM: People can easily get diverted into minutiae. A casual reference to a personal pet idea may trigger a heated argument among your erstwhile happy planners and threaten group consensus. Sometimes this is just because certain people find it easier to discuss concrete details than large issues. Help people regain perspective and move on, noting issues to bring up later in your planning process.
- RECOGNIZING IRRECONCILABLE CONFLICTS: Not every group or project is meant to be. Not every organizer's enthusiasm and vision withstands the cold light of reality. Timing is all -- or nearly all: material support is pretty vital too, and so is person-power. Early discussions of values and vision are the best possible time to be evaluating whether it really seems advisable to go forward. Recognize the risks you're taking, and

accept the possibility of failure. If a little voice tells you this is not the time, don't ignore it without serious consideration. The stage of talking about mission should be early enough to give you the opportunity to back out. Perhaps the group of people isn't right, the organization doesn't seem viable. If so, it's time to rethink.

In my experience, mission, values, and vision don't come neatly packaged in separate mental compartments. Instead, they are braided together in people's hearts and minds. For planning purposes, I have always striven to keep the process as open as possible. Instead of focusing a group on filling in each separate blank of mission, values, and vision in turn, I invite everyone to share the entire picture of what they'd like to see the group doing and how. For some people, it will be most comfortable to focus on the purpose of the organization itself: its mission. Others will naturally begin imagining how the world will change as the result of the group's work, the array of things they'd like it to do: their vision. And others will find themselves thinking first about how the kinds of groups the organization should involve and how they should work with each other and the public: elements of the organization's values. After welcoming all these contributions, planners can easily review the results of the brainstorming session and harvest what is needed to formulate mission, values and vision statements. The alternative approach -- trying to engage a whole group of dreamers in drawing fine distinctions between what's a vision and what's a value -- can easily dampen enthusiasm and cooperation.

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