

## **MISSION, VISION, VALUES**

**by Jane Logan**

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Mission, vision and values are supposed to be the North Star of strategic planning, the beacon by which organizations set their strategic compasses and then align their everyday priority setting. But let's face it, the prospect of attending a visioning session is not always greeted with enthusiasm by the conscripts.

We've all been there. Held captive in a windowless room, hallucinating slowly from a) too much coffee; b) uncapped magic markers and c) the glaring blankness of the flip charts. We've wordsmithed with a warring group of colleagues well beyond the point of caring. The result is a mission statement that looked much like our last one – and like everyone else's. Or else we've crafted a vision so lofty, outrageous, or abstract (save the world, conquer the world...) that seeds of doubt are planted before we leave the room.... Is this really worth the effort?

### **Persevere, the results are worth it**

The development of well-written vision, mission and values statements signals intent and direction, allowing employees the freedom to put their own mark on implementation - an essential part of enthusiastic execution and good governance. A periodic review of mission and vision compels the Board of Directors to agree on the organization's long-term direction, set a new course if required or to get the organization back on track. Jim Collins makes a strong case in his book Built to Last that embracing a vision is part of what separates truly exceptional companies that have stood the test of time from other companies. Of course it's much more than coming up with a catchy slogan.

Here is some advice for a successful start to framing your organization's mission, vision and values. It takes perseverance, the courage to set your own stamp on the results, and a desire to live the results rather than tuck them away on a website and forget them.



**Make sure the team shares the same definitions:****▪ Mission statements**

- Describe the overall purpose of an organization: what we do, who we do it for, and how and why we do it.
- Set the boundaries of the organization's current activities.
- Are the starting point in developing a strategic vision.

A mission review gets an organization back to basics. The essential activity of determining whom you serve can be a wake-up call for organizations that have started to skew their activities to meet the needs other stakeholders (such as their funders or lobby targets) and not their actual clients.

**▪ Vision statements**

- Describe an ideal future.
- Reflect the essence of an organization's mission and values.
- Answer the question, what impact do we want to have on society?
- Unite an organization in a common, coherent strategic direction.
- Convey a larger sense of organizational purpose, so that employees see themselves as "building a cathedral" rather than "laying stones".

**▪ Values statements**

- Reflect the core ideology of an organization, the deeply held values that do not change over time.
- Answer the question, how do we carry out our mission?
- Are the values your organization lives, breathes and reflects in all its activities, not the ones you think you should have.



## The Canadian Cancer Society – a great example

### Mission

The Canadian Cancer Society is a national, community-based organization of volunteers whose mission is the eradication of cancer and the enhancement of the quality of life of people living with cancer.

### Vision

Creating a world where no Canadian fears cancer.

### Values

These serve as guidelines for our conduct and behaviour as we work towards our vision.

- **Quality** – our focus is on the people we serve (cancer patients, their families, donors, and the public) and we will strive for excellence through evaluation and continuous improvement.
- **Caring** – we are committed to serving with empathy and compassion.
- **Integrity** – we are committed to act in an ethical, honest manner.
- **Respect** – we believe that all people should be treated with consideration and dignity. We cherish diversity.
- **Responsiveness** – we strive to be accessible, flexible, transparent, and to demonstrate a sense of urgency in our resolve and decision-making.
- **Accountability** – we are committed to measuring, achieving and reporting results, and to using donor dollars wisely.
- **Teamwork** – we are committed to effective partnerships between volunteers and staff, and we seek opportunities to form alliances with others.

## To get the job done:

### ▪ **Don't get hung up on semantics.**

If a future-oriented mission statement works for your organization as both mission and vision, go for it! The important thing is to understand what you do (and don't do) and what you are working towards. Gaining consensus on this and being able to communicate it to stakeholders are huge achievements.

### ▪ **Don't tie yourself in knots with wordsmithing.**

Take the process as far as you can go, and then pick a group to finalize your words based on the discussion. Your meeting time is better spent moving forward than polishing after consensus has been achieved.

### ▪ **Consider developing three to five mini-visions instead of a single vision statement.**

These may be easier to develop than a single, perfect overarching statement. Remember, it's all about signalling intentions.



## To ensure inspirational and practical results:

- **Put “mega” into your mission and vision.**

What kind of world are you helping to create for tomorrow’s children? What added value to society is your organization working towards? It’s a concept that should not be restricted to charitable organizations or public benefit associations. Roger Kaufman, a well-known strategic planning author, champions the need for an organization’s planning to have a “Mega” dimension that focuses on external clients, including customers/citizens and the community that the organization serves. Mega goals address the need for companies to have a higher purpose than simply making money – or simply serving a narrow interest group in the case of associations. Collins found that paradoxically, companies with a higher purpose were more financially successful than companies strictly focussed on profit.

The mission of the Association of Professional Engineers, Geologists and Geophysicists of Alberta is to serve society and protect the public by regulating, enhancing and providing leadership in the practice of the professions of engineering, geology and geophysics. The Canadian Manufacturers & Exporters’ mission is to continuously improve the competitiveness of Canadian industry and to expand export business. Wow! Serving society and the sector are much better long-term strategies than serving the membership alone. I contrast the mission of the Science Teachers of Manitoba “To promote and support the development of science education for teachers and students of Manitoba” with another provincial teacher’s group “Through leadership and service we dedicate ourselves to the promotion of the professional excellence and personal well-being of teachers...”

- **Make sure your value statements are meaningful to your everyday operations by spelling out what you mean.**

The key to meaningful values is to avoid lists of single words. After all, we all believe in integrity, don’t we? The Canadian Cancer Society example, given above, shows how definitions transform values from slogans to guidelines.

Many private and non-profit organizations use a code of ethics, a credo or other long-form description of what they believe in. The John Howard Society sets out six principles to guide the activities of its employees and



volunteers, including “People have the right to live in a safe and peaceful society as well as a responsibility implied by this right to respect the law” and “All people have the potential to become responsible citizens.” These kinds of values statements help people to make decisions, and to respect the intent and spirit of their organization’s purpose and plan even when specific situations aren’t covered.

- **Finally, learn it, live it, align it.**

This means spending time making sure your organizational goals and objectives are aligned with your mission, vision and values. Are you serving your clients or your members in all your activities? Are you true to the intent of your mission and vision? Are your departmental objectives and tactics supporting your mission and in line with your values? Well-written phrases are nothing without good execution - Enron’s values statement famously included “respect, integrity, communication, excellence”.

Mission, vision and values statements are fundamental to strategic planning and good management. And reviewing major decisions against these yardsticks is a powerful governance tool. Reviews allow those involved to truly understand the objectives of the organization, to make everyday decisions that are consistent, and to buy into new directions. The organization is able to evolve without experiencing chaos because its overall direction and intent are clear. The Board, employees and volunteers gain a sense of pride in working for an organization that stands for something and are united by a common sense of purpose. These are compelling reasons to create meaningful, reflective statements that shine beyond your organization’s annual report and web page, bringing guidance and motivation to all your initiatives.

Recommended further reading:

James C. Collins, Jerry I. Porras, “Building Your Company’s Vision”, Harvard Business Review, September 1996. (also look at [www.jimcollins.com](http://www.jimcollins.com))

James C. Collins, Jerry I. Porras, Built to Last: Successful Habits of Visionary Companies, HarperBusiness, 1994.

Roger Kaufman et al.; Strategic Planning for Success: Aligning People, Performance and Payoffs, Jossey-Bass/Pfeifer, A Wiley Imprint, 2003.



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Contact [janelogan@loganstrategy.ca](mailto:janelogan@loganstrategy.ca)

