

# SESSION 1

WHAT IS THE VISION  
OF YOUR ORGANIZATION?



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# WHAT IS THE VISION OF YOUR ORGANIZATION?



## Session Overview

### Session Summary

In this session, participants will discuss ideas for the future of their organization. This idea of the future is referred to as a vision. To create a statement about their vision (a vision statement), it will be necessary for participants to reflect on their organization's mission statement and review the vision of the community they wanted to develop during COMMUNITY VOICES. If the organization has a vision statement, participants will review it to determine if changes in organizational structure or service provision need to be made in the future.

Reflecting on the ideas already generated regarding the organization's future will help participants clarify or develop the vision statement. The vision statement of an organization should be forward-looking, describing what the organization wants to be in the future.

### Objectives

At the end of Session 1, participants will have:

1. discussed what is emphasized in the vision statement of an organization
2. clarified or developed the vision statement of their organization
3. prepared a written vision statement

## Opening the Session

Introduction

### Skill Work

1. What is the vision statement of an organization?  
Strategy: analysis, questions, answers and large-group discussion
2. What is your vision?  
Strategy: creative exercise, questions, answers and large-group discussion with consensus
3. Prepare a written vision statement for your organization.  
Strategy: prioritizing, questions, answers and large-group discussion
4. Whom do you need to involve in planning for your vision?  
Strategy: questions, answers and generating a list

### Follow-Through

Recruiting others to get involved in planning for your organization  
Strategy: fieldwork

### Closing the Session

Review: What is the vision of your organization?

Preview: Plan to reach your vision.

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## Materials Needed

You will need some items for this session:

- training guide for Session 1
- Tool Kit 1.1 – “The Voices of People: Vision Statement and Mission Statement”
- Tool Kit 1.2 – “What Is Included in the Vision Statement of the Voices of People?”
- Tool Kit 1.3 – “What Is Included in the Vision Statement of (Your Organization?)”
- Tool Kit 1.4 – “The Vision Statement of (Your Organization)”
- Flip Chart 1A – “What Is Included in the Vision Statement of the Voices of People?”
- Flip Chart 1B – “What Is Included in the Vision Statement of (Your Organization?)”
- Flip Chart 2 – “The Vision of (Your Organization)”
- Flip Chart 3 – “Who Will Be Involved in the Planning of (Your Organization?)”
- Flip Chart 4 – “Things To Do To Get Others Involved”
- COMMUNITY VOICES Flip Chart – “Vision of Community”
- COMMUNITY VOICES Flip Chart – “List of Problems and Needs”
- vision statement for each organization that already has one
- flip chart, easel, markers, tape, overhead projector

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## Things To Do before the Session

1. Send a note to remind participants of the training session and ask them to bring/have available the following:
  - a copy of the organization's mission statement
  - a copy of the organization's vision statement (if available, vision of the community developed in COMMUNITY VOICES)
  - the list of problems and needs identified in COMMUNITY VOICES
2. Obtain a copy of each of the above and familiarize yourself with the contents prior to conducting this session.
3. Prepare flip charts as noted in the materials section.
  - If not already on flip chart sheets, copy the "Vision of the Community" and the "List of Identified Problems and Needs" from the COMMUNITY VOICES program.
4. Training preparation
  - Go over the session before the actual session is to take place.
  - Check to be sure that all materials are developed.

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# Opening the Session

## Introduction

**A vision is, in part, a reflection of an organization's mission. However, vision goes beyond the mission to a point in the future – it indicates the changes the organization wants to make at some future time. A vision may be thought of as your dreams of what you want your organization to look like in the future. The vision may reflect the type of organization you want to become and the success your organization wants to experience in the future.**

**A vision can serve as a guide for an organization to move it from its present state (its mission) to its desired future state (its vision).**

# Skill Work

## 1. What is the vision statement of an organization?

### Purpose

We will now review the vision statement of the Voices of People to discuss what is included in its vision statement. We will discuss how the vision statement is an expansion of the organization's mission.

### STRATEGIES AND MATERIALS

**Strategies:** group analysis, questions and answers, group discussion

**Materials Checklist:**

- Tool Kit 1.1 – “The Voices of People: Vision Statement and Mission Statement” enlarged
- Flip Chart 1A – “What Is Included in the Vision Statement of the Voices of People?”
- overhead projector, flip chart, markers, tape

### Directions

1. Post the mission statement and vision statement from Tool Kit 1.1 for the group to review. Post the statements side by side, leaving a space in the middle to post Tool Kit 1.2
2. Post Flip Chart 1A – “What Is Included in the Vision Statement of the Voices of People?” (Tool Kit 1.2) between the mission and vision statements.

WHAT IS INCLUDED IN THE VISION STATEMENT OF THE VOICES OF PEOPLE?			
Who are they?	What do they want to accomplish?	Who and where will they serve?	What are their values and beliefs?

Flip Chart 1A (Tool Kit 1.2)

3. Explain to the group:

**A vision statement describes how an organization wants to be viewed in the future. It describes your organization in an ideal future state. The vision statement also reflects the values and beliefs your organization desires in the future.**

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4. Ask a volunteer to read aloud the mission statement and then the vision statement of the Voices of People.
  5. Ask a volunteer to record the responses to the questions on Flip Chart 1A under the appropriate columns.
  6. Ask the group to refer to the mission and vision statements of the Voices of People to answer the following questions.
    - **What does the vision statement say about who the Voices of People wants to be in the future, that expands from the mission statement?**
    - **What does the vision statement say about the values and beliefs of the Voices of People in the future, that expands from the mission statement?**
  7. Tell the group:

**It may be necessary to review the issues, needs and concerns that the Voices of People stated they would work on in their mission statement. This is necessary in order to know if they decided to change or expand their efforts from what is in the mission statement.**

**Now, you will review the vision statement of the Voices of People to determine the answer to the questions about what the organization wants to accomplish in the future.**
  8. Ask the group to revisit the mission and vision statements. Ask the following questions:
    - **What critical issues, needs and concerns did the Voices of People want to address in the future, that expands from the mission?**
    - **In what ways did the organization say it would address or solve the critical issues, needs and concerns in the future, that expands from the mission?**
    - **What types of changes did the Voices of People envision for the organization in the future that expands from the mission?**

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9. Say to the group:

**Now let's focus on who and where the people are that the Voices of People wants to serve in the future. We will look at how answering the "who and where" expands from the group's focus in the mission statement.**

10. Ask the group the following questions:

- **What does the vision statement say about *who* the organization wants to serve in the future that varies from the mission statement?**
- **Where will the organization provide its services?**

11. Tell the group:

**Now we will discuss how the Voices of People envisioned total success for the organization in the future. The vision statement describes what the Voices of People "sees" the group's success will look like in the future.**

12. Ask the group the following questions:

- **What does the vision statement say about the success that members want to achieve as an organization in the future?**
- **What did the Voices of People want future success to look like in the areas where it provides services?**

13. Summarize what the vision statement says about the future plans of the organization on Flip Chart 1A.

## Summary

**In this activity, we have discussed what is included in the vision statement of the Voices of People by describing what they want to take place in the future as an organization. We also discussed the changes regarding what they wanted to accomplish in their organization and how the Voices of People organization wants to be viewed in the future.**

**One of the changes they wanted to occur was to be recognized as a leader in providing excellent programs, projects and services to elderly citizens. And they wanted to be acknowledged as the best in Denver County.**

**Next, we will discuss the vision statement of your organization.**

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## 2. What is your vision?

### Purpose

You have already been involved in visioning during COMMUNITY VOICES when you created a picture of what you want your community to look like in the future. You described what you wanted to take place in the community in ten years. We will now begin to develop or clarify the vision statement emphasizing what you want to take place in your organization at some future time. The vision statement focuses on your dreams of what you want to accomplish as an organization that expands from what you stated in your mission.

Now you will reflect on your mission statement and review and discuss the vision of the community that you developed in COMMUNITY VOICES. If you already have a vision statement, you will revisit the statement to clarify and/or revise, if necessary. If you do not have a vision statement, you will develop one for your organization.

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### STRATEGIES AND MATERIALS

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**Strategies:** questions and answers, small- and large-group discussions, drawing exercise

**Materials Checklist:**

- COMMUNITY VOICES Flip Chart – “Vision of Community”
  - COMMUNITY VOICES Flip Chart – “List of Problems and Needs”
  - vision statement for each organization that already has one
  - Flip Chart 8 – “Mission of (Your Organization)” from Part 1, Session 1
  - Tool Kit 1.3 – “What Is Included in the Vision Statement of (Your Organization)?”
  - Flip Chart 1B– “What Is Included in the Vision Statement of (Your Organization)?”
  - overhead projector, flip chart, markers, tape
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### Directions

1. Post the flip charts, “Vision of the Community” and “Problems or Needs,” that you identified during COMMUNITY VOICES to address or solve.
2. Post Flip Chart 8 – “Mission of (Your Organization)” and vision statements for any groups that have them. Post the statements opposite one another, leaving a space in the middle to post Tool Kit 1.3.

3. Post Flip Chart 1B – “What Is Included in the Vision Statement of (Your Organization)?” between the mission and vision statements. You will need to post a copy for each organization represented.

<b>WHAT IS INCLUDED IN THE VISION STATEMENT OF (YOUR ORGANIZATION)?</b>			
<b>Who is the organization?</b>	<b>What does the organization want to accomplish?</b>	<b>Whom and where will the organization serve?</b>	<b>What are the organization’s values and beliefs?</b>

Flip Chart 1B (Tool Kit 1.2)

4. Divide the group into two small groups if there is one organization represented. If there is more than one organization present, divide into groups by organization. Distribute sheets of flip chart paper.
5. Say to them:
 

**We are now going to draw pictures of what you would like your organization to look like in the future. Drawing these pictures will help you to create a vision for your organization. Remember that a vision for your organization is a picture of an ideal state that reflects your dreams and wishes for what the organization will look like and what it will do. The vision describes what your organization would look like if it were completely successful.**
6. Bring the groups back together after they have drawn their pictures, and ask for a volunteer to explain the picture and how it depicts the group’s vision of the organization.
7. Using the pictures as a guide, ask the group to refer to the second column on Flip Chart 1B, *What does the organization want to accomplish?*
8. Ask a volunteer to record the responses to the following questions under the appropriate column on Flip Chart 1B. If necessary, divide the group into smaller groups according to the organizations they represent.

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9. Ask the group(s) the following questions and record responses in column 1.
- **Who is the organization? What are its core services or programs?**
  - **How will your organization be structured or organized to address the critical issues, needs and concerns it has identified for the future?**
  - **What types of changes do you envision that your organization will need to make internally for the future?**
10. Say to the groups:
- Now let's focus on *who and where* the people are that your organization wants to serve in the future. We will look at how answering the *who and where* expands your focus in the mission statement.**
11. Ask the group the following questions and record responses in column 3.
- **Whom do you want to serve in the future that expands your mission?**
  - **Do you envision your organization providing new or expanded services? Where do you want to provide services in the future, that expands your mission?**
12. Tell the group:
- Now we will discuss what you want the success of your organization to look like in the future. The vision statement can describe what you want the success of the organization to look like in the future and how you want to recognize your success.**
13. Ask the group the following questions:
- **What do you want your success to look like in the future?**
  - **What does your organization need to do to realize its future success?**
  - **How will you determine when you have achieved this success?**
14. Tell the group:
- Let's now discuss what, if any, expansion you want to make in your organization's values and beliefs that will have an impact on the services it provides to the community in the future.**

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**We will also discuss what expansion, if any, you would like to make regarding who you are and what you want to do in the future.**

15. Ask the group the following questions and record responses in column 4:

- **What expansion would you like to make regarding your organization's values and beliefs in the future?**
- **What expansion would you like to make regarding who the organization will be in the future?**

16. Summarize the group discussion.

## Summary

**You have gathered ideas to include in the vision statement for your organization. These ideas will help you decide what you would like your organization to look like in the future.**

**An important quality of a vision statement is that it is inspiring – inspiring to the people involved in the organization AND to others with whom the organization interacts – its clients, citizens in the community, donors, etc. A vision statement can inspire its members to reach and strive for ultimate success.**

**Next, you will prepare or revise the written vision statement for your organization, guided by your answers from this exercise.**

## 3. Prepare a written vision statement for your organization.

### Purpose

**You will prepare a written vision statement for your organization by reflecting on information you discussed in the previous exercise. The vision statement will indicate what you want the future of your organization to be like. It should be future-oriented and reflect ideas and ambitions you desire for the organization.**

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## STRATEGIES AND MATERIALS

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**Strategy:** group discussion

**Materials Checklist:**

- Tool Kit 1.4 – “The Vision of Your Organization” copies and transparency
  - Flip Chart 2 – “The Vision of (Your Organization)”
  - overhead projector, flip chart, markers, tape
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### Directions

1. Distribute copies of Tool Kit 1.4 – “The Vision of Your Organization.”
2. Post Flip Chart 2 – “The Vision of (Your Organization)” for each organization represented. Ask a volunteer to record the answers to questions in the appropriate blank spaces, 1-5, below.

**THE VISION OF (YOUR ORGANIZATION)**

The (2: insert who you envision you will be in the future) \_\_\_\_\_

\_\_\_\_\_ (2: insert any changes in your values and beliefs)

\_\_\_\_\_ (3: insert what you want to do and accomplish in the future)\_\_\_\_\_

for (4: insert who you will serve in the future) \_\_\_\_\_

\_\_\_\_\_ (5: insert the areas, i.e., communities/counties, you want to serve in the future)\_\_\_\_\_.

Flip Chart 2

3. If necessary, divide the group into smaller groups according to the organizations they represent.
4. Ask the group to prioritize its responses from the previous exercise.

**Now you will prioritize the most important responses you want to include in your vision statement.**

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5. Provide participants with markers to underline the most important choices that their organization would like to include in the vision statement.

**Next, you will begin to plan how you will move toward the vision of your organization while staying focused on its mission.**

6. Once everyone has completed the exercise, ask a volunteer to read the information that is underlined. Rewrite the information that is underlined into a statement. Ask if any there are additions or deletions.
7. Summarize by reading aloud the statement to the group.
8. Explain to the group:

**Now we will begin to prepare the written vision statement by reemphasizing the responses to the questions in the previous exercise. This will ensure that you have what you want in your vision statement.**

**As we have discussed, the name selected by your organization conveys what you want others to know about who you are. Therefore, when you perform your work in communities with this name, it portrays to others certain images or messages regarding your organization.**

9. Ask the group the following questions:
  - **What changes do you want to make to better emphasize the name of your organization for the future? This name expands from the mission of your organization.**
  - **What changes do you want to make to highlight the unique characteristics of how your organization could look in the future?**

10. Tell the group:

**Now, let's go around the room and review the information from the posted flip chart pages. This will help you decide what you think is the most important information you want to include in the vision statement, particularly your organization's values and beliefs in the future.**

**The values and beliefs demonstrated by people involved in your organization as they carry out its work will provide an impression of your**

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**organization and what you want others to think of you. These values and beliefs can convey a public identity or image of your organization.**

11. Ask a volunteer to record the information to the responses on the flip chart in the blank space 2 to the following questions to include in the vision statement of the organization.

12. Ask the group the following questions:

**What changes are needed to emphasize the values or beliefs you want the organization to represent when you are serving people in your service areas in the future?**

13. Explain to the group:

**You will review what you have described as the success you want to achieve and when it will take place for your organization and communities in the future.**

14. Ask the group the following questions:

- **How do you want your organization's success to look in the future?**
- **How will you know whether you have achieved this success?**
- **What roles do you want your organization to play in the success of communities that you serve?**

15. Ask a volunteer to record the information to the responses on the flip chart in the blank spaces 3 and 4 of Flip Chart 2.

16. Say to group:

**Let's review your answers to the questions about changes for what you want to accomplish in your organization in the future. You will also discuss whether you want to make any changes regarding the critical issues, needs and concerns you want to focus on in the future, that expand from your organization's mission.**

**You'll review who and where your organization wants to serve in order to accomplish your goals.**

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17. Ask the group these questions:

- **What critical issues, needs and concerns do you want to focus on as an organization in the future?**
- **What does your organization want to accomplish to address the issues, needs and concerns of communities in the future?**
- **What expansion, if any, do you want to make in whom you serve or want to benefit from your work in the future?**
- **How do you want the communities you serve to be different?**
- **What expansion, if any, do you want to make about where you want to provide your services in the future?**

18. Summarize by reading the answers to the questions. Ask the volunteer to delete or add information the respondents want to emphasize in their written vision statement of the organization.

19. Ask the group to add or delete information on the flip chart of the vision statement draft that may not be clear or on which they disagree. (Note: It is important to continue this process until the group has the desired vision statement for the organization.)

20. Summarize by reading the revised vision statement the group(s) have developed for their organization(s).

21. Say to the group:

**A vision statement should be inspiring and easily understood, stated in terms of how your organization wants to excel and be distinguished from other organizations. Often, an organization that has a vision can spend less time debating what to do or how to do it.**

**The vision statement provides members a focus or direction for where the organization is going in the future. In many cases, when there is a clear direction or vision of what can be, members may be more energized to take leadership for creating and pursuing opportunities on behalf of the organization.**

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22. Ask the following questions:

- **Is your vision statement inspiring and easily understood?**
- **How can your vision statement help your organization?**

**In this session, you have prepared or clarified the written draft of the vision statement of your organization. Developing or clarifying your written vision statement can provide an understanding of where the organization is going as it moves into the future.**

## Summary

**Next, you will begin to plan how you will move toward the vision of your organization while staying focused on its mission.**

# 4. Whom do you need to involve in planning for your vision?

## Purpose

**Before the next meeting, you will need to identify whom within your organization you want to be involved in the planning process of your organization.**

**It is important to gain the involvement and commitment of members of the organization in the planning process. This should consist of the decision-making body, as well as members and/or staff of your organization. By involving them, you can seek ideas and input regarding the direction of the organization. This involvement should increase participation as you begin to make progress toward reaching your vision and fulfilling the mission of your organization.**

**Now you will identify whom, within your organization, you want to be involved in the planning process to develop a written plan for guiding the direction of the organization.**

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### STRATEGIES AND MATERIALS

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**Strategies:** question and answer, list generation

**Materials Checklist:**

- Flip Chart 3 – “Who Will Be Involved in the Planning of (Your Organization)?”
  - flip chart, markers, tape
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## Directions

1. Prepare Flip Chart 3 – “Who Will Be Involved in the Planning of (Your Organization)?” to look like the one below. You will need to make a separate flip chart sheet for each organization that is represented.

<b>WHO WILL BE INVOLVED IN THE PLANNING OF (YOUR ORGANIZATION)?</b>		
<b>Board Members, Task Forces, Officers</b>	<b>Staff</b>	<b>Members</b>

Flip Chart 3

2. If necessary, divide the group into smaller groups according to the organizations they represent.
3. Ask a volunteer to record the group responses on Flip Chart 3.
4. Say to the group:

**It is important to seek the involvement of your decision-making body in the planning process. This body includes those people who serve on your board, officers, task forces, members and staff.**

**Seeking involvement of your organization’s members during the planning process may enable you to improve communication and build relationships across the organization. It can help you identify people who have similar interests and who may want to become involved in particular areas of your organization.**

5. Ask the group the following questions and record the responses under the appropriate column on the flip chart titled “Who Will Be Involved in the Planning of the Organization?”
  - **Whom from within your organization would you like to involve in the planning process?**
  - **Why would you need to involve them in the planning process?**

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- **What are the benefits of involving them in this process?**
  - **What roles and responsibilities do you think they can play in the planning process?**

6. Summarize responses from Flip Chart 3.

## Summary

**In this activity, we discussed whom you would like to involve in the planning process of your organization. This included your decision-making body and members. This is a necessary step prior to engaging in planning. It enables you to obtain active involvement, participation and commitment from as many people as possible within the organization.**

# Follow-Through

## Recruiting others to get involved in planning for your organization

### Purpose

We will now determine the next steps for recruiting the people that you want to get involved in the planning process. This will involve deciding who will take on what roles and responsibilities to make this happen. We will discuss what to do before the next session.

### Directions

1. Post Flip Chart 4 –“ Things To Do To Get Others Involved.” You will need to make a separate flip chart sheet for each organization.

THINGS TO DO TO GET OTHERS INVOLVED	
1	
2	
3	
4	
5	

Flip Chart 4

2. If only one organization is represented, divide the group into two small groups. If more than one organization is represented, divide into small groups based on organizations represented.
3. Give each group a flip chart sheet and a marker. Ask each group to choose someone to record responses.
4. Ask the groups to brainstorm ideas about what they will have to do get others involved in planning for their organization.
5. Bring the groups back together. Ask each recorder to report responses.

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6. Ask for a group of volunteers from each organization to take these ideas and:
- finalize a list of all of the things they think they will have to do to get others involved
  - identify what the roles and responsibilities will be for those involved
  - determine when the roles should be performed
  - identify what they feel can be accomplished from the list before the next session
  - contact those who will be involved and request the involvement
  - follow up with those who agreed to take on various roles to determine if they are experiencing problems and need help so adjustments can be made before the next session.

## Summary

**You have decided who will be responsible for getting others involved in planning before the next session. You have a list of things to do to help you get started with this task. Now, you need to follow through on the plans you have developed prior to scheduling the next session.**

**In the next session, you will learn more about developing a plan to guide you toward reaching the vision of your organization.**

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# Closing the Session

## Review

1. Have the group do a Go-Around:

**To close this session, I would like for each of you to tell some things you learned or thought were interesting in today's session. You may want to comment on what you learned and how the information you learned can help your organization.**

2. Ask these type of questions if the group needs guidance:

- **Why do you think an organization needs a vision statement?**
- **What are some things that a vision can do for an organization?**

3. Emphasize to the participants:

**Today we have created a vision statement for your organization. This vision sets the direction for where you want to go in the future.**

4. Read this summary, or explain in your own words:

**A vision statement is essential for an organization if it wants to grow and be relevant to the needs and interests of the people it is serving. The vision statement provides a vivid and inspiring picture of what success will look like for the organization and the people it serves in the future.**

## Preview

**At the next meeting we will begin a focused planning process to help your organization achieve its mission and reach the vision that you developed during this session.**

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# Tool Kits

## Tool Kit 1.1

### **THE VOICES OF PEOPLE MISSION STATEMENT**

**Voices of People believes that elderly citizens have the ability to live in their homes independently. The organization will assist the elderly living in eastern Denver County to become actively involved in improving their health and making appropriate lifestyle changes.**

### **THE VOICES OF PEOPLE VISION STATEMENT**

**The Voices of People will be recognized as a leader in providing excellent programs, projects and services to elderly citizens experiencing health problems and social and economic stress.**

**Voices of People will be the premier provider of educational and community services and programs and will act as a catalyst to enhance business development that will support the needs of the elderly in Denver County.**

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Tool Kit 1.2

<b>WHAT IS INCLUDED IN THE VISION STATEMENT OF THE VOICES OF PEOPLE?</b>			
<b>Who are they?</b>	<b>What do they want to accomplish?</b>	<b>Who and where will they serve?</b>	<b>What are their values and beliefs?</b>

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Tool Kit 1.3

<b>WHAT IS INCLUDED IN THE VISION STATEMENT OF YOUR ORGANIZATION?</b>			
<b>Who are they?</b>	<b>What do they want to accomplish?</b>	<b>Who and where will they serve?</b>	<b>What are their values and beliefs?</b>

## **THE VISION STATEMENT OF YOUR ORGANIZATION**

The \_\_\_\_\_

**(1) Who you envision you will be in the future**

\_\_\_\_\_  
**(2) Changes in your values and beliefs**

\_\_\_\_\_  
**(3) What you want to accomplish in the future**

\_\_\_\_\_  
**(4) Who you will serve in the future**

\_\_\_\_\_  
**(5) Where (i.e., communities/counties)  
you want to serve in the future**