

Choosing Our Direction

Workbook 3

What Are We Going to Do?



Introduction

This workbook is one of five in the *Choosing Our Direction* series designed to assist your group, organization, or nonprofit agency in developing an effective strategic plan that can help you strengthen and sustain your organization. These workbooks can also help provide you with the insight you need to accurately and realistically guide your future. Even more importantly, these materials will help you outline an effective course of action that will make your strategic planning efforts pay dividends long into the future.

For your group to plan for the future, it is important that the group has goals that the members understand and agree upon. The first two *Choosing Our Direction* workbooks examined your organization's structure, activities, the external and internal forces that affect its future, and strengths, weaknesses, opportunities, and threats. This workbook will use the information gleaned from the exercises in Workbooks 1 and 2 to help you review or create your mission and vision statements, identify and prioritize group goals, and match those goals to the group's organizational structure.



Effective forward-looking organizations focus their efforts on activities that match their mission with strengths and opportunities.

Developing (or Revising) Your Mission and Vision Statements

These days, almost every organization that has been in existence for any length of time has a mission statement. It is helpful to regularly review the mission statement and revise it as necessary. Even if your organization has a mission statement, members and stakeholders of the organization may lack a common understanding about what the organization contributes, its values, goals, and the audiences it serves. Your organization's mission and vision statements are the basis for its goals. Exercises in this workbook will guide your strategic planning group through a process that ensures that the goals are in line with the mission and vision statements.

Creating an Effective Mission Statement

An organization's mission is its reason for existence, its purpose, and its justification for being. Yet simply having a mission statement is not enough. It should be an integral part of how your organization defines, organizes, and describes itself. Accordingly, it should serve both internal (organizational) and external (informational) purposes. It should serve as a guide for both those who are intimately engaged in the organization's efforts as well as a clearly defined descriptor for those who know nothing about the organization.

An effective mission statement then focuses discussion on what is important about your organization.

Components of an effective mission statement include:

- Purpose
 - What social, political, environmental, or other needs do we seek to address?
 - What do we strive to create?
 - What benefits do we provide?
 - What is our reason for being?
- Customers
 - Who do we serve?
- Business
 - How do we serve our customers?
 - What services (generally) do we provide?
- Values
 - What do we believe in?
 - What motivates and inspires us?
 - What is our philosophy or guiding principles?
 - What is our reputation built on?
- Uniqueness
 - What makes us special?
 - How are we different from other similar organizations?
 - What difference would it make if we closed our doors tomorrow?

The mission statement therefore defines the boundaries an organization agrees to set for itself and works within. As such, it reflects the basic purpose of the organization and defines what the organization does as well as does not do. Quality mission statements, however, serve a number of purposes and should therefore be crafted (or revised) with a number of things in mind. They should also be

- concise,
- specific,
- clearly stated,
- to some degree inspirational, and
- no more than three or four sentences.

Exercise #1 is designed to gather information that will provide the basis for generating a mission statement for organizations that don't have one, or assessing and revising existing mission statements.

Exercise #1: Developing (or Revising) Your Mission Statement (30–90 minutes)

Individually write your answers to the following. Note: The group will have already discussed parts of these questions if the strategic planning group conducted Exercise #1 in Workbook 1. This exercise will provide additional insight in determining if the members have a common understanding about your organizations' goals, operating procedure, and values.

1. What does your organization seek to contribute to the community and/or its members? What are your organization's goals?

2. How does your organization seek to achieve these goals? What services does your organization provide?

3. Who are your organization's primary clients? Are these the same it should be serving?

4. What do you value about how your organization accomplishes tasks? What standards do you think are important about how your organization does what it does?

After participants have recorded their answers to the questions, each participant will share their answer to the question 1. Write the individual answers for question 1 on one sheet of easel paper. Share the answers for question 2 and record them on a separate sheet of easel paper, and so on.

After the responses are aggregated, discussion should revolve around the following questions:

1. Do the members share a common understanding of why the organization exists and what it contributes to the community and/or stakeholders?
2. Do members articulate common goals?
3. Do members agree on the audiences the organization serves?
4. Do members agree on common values and standards?

If this discussion leads to the decision that the mission statement should be modified or created, it is best to assign a working group of two to three people to craft a draft statement rooted in the important elements of your discussion. This draft should then be shared with the full group at your next session together and refined. In this manner, you avoid the sometimes time-consuming and frustrating job of wordsmithing by the committee. Once everyone agrees with the statement as developed or revised, it should be recommended to the governing body of your organization for formal adoption.

Often discussions related to a mission statement generate far more issues, concerns, and purposes than can be feasibly incorporated into an effective and concise mission statement. If this is the case with your organization or group, you may want to consider developing the ideas you have discussed in the questions above into a statement of purpose and/or a statement of values. In either case, such statements—or, more commonly, lists—should be used primarily as internal (organizational) guiding principles, purposes, and values rather than statements intended for external audiences.

Developing Group Goals

Goals are descriptive, open-ended, and often broad statements of desired future conditions that convey a purpose but do not define measurable units. Effective organizations set goals that will move the organization toward its preferred vision and attain the group's mission. Group goals increase an organization's effectiveness by:

- Giving direction and coordinating group efforts
- Resolving conflict and focusing efforts on achieving the goals
- Evaluating effectiveness and helping track the group's activities
- Identifying programs and activities that will achieve the organization's vision and mission

Group goals are most effective if they are generated and agreed on by members of the organization. Group participation in setting the goals will help ensure the goals meet members' needs and interests, help members understand how their involvement contributes to achieving the goals, and stimulate cooperation and commitment.

Exercise #3: What Are Our Organization's Goals (45–60 minutes)

To prepare for the larger brainstorming and consensus-building exercises ahead, write down five to ten goals you believe should be pursued by your organization over the next 1–3 years. Think about the big picture—what would be ideal for your organization in the long term? Dream. At this stage, don't worry about whether any of your ideas are realistic or feasible or how they might be achieved. That comes later in Workbook 4.

Throughout this exercise keep in mind that goals are descriptive, open-ended, and often broad statements of desired future conditions that convey a purpose but do not define measurable units. Objectives are the “how” items implemented to achieve the goals.

Small Group Activity

Identify one person that will keep the group on time and one person to capture the group output on easel paper.

10 minutes

Individually write three to five goals you have for the organization. Remember that goals are descriptive, open-ended, and often broad statements of desired future conditions that convey a purpose but do not define measurable units.

10 minutes

Share the goals with the small group in a round-robin fashion (each person shares one goal, then the next person until each person has shared one goal, then repeat the process until each person has shared all the goals they have written). One person in the group will write the statements on easel paper as they are shared. *Discussion should be limited to questions that would clarify the goals.*

20 minutes

Review the goals.

- Group the goals as appropriate to identify common goals.
- Discuss the goals to ensure they are realistic and desirable.
- Do the goals reflect the issues raised during the SWOT discussion?
- List the common small group goals on a sheet of easel paper.
- Identify a person to report the small group results to the full group.

20 minutes

Small groups report their discussion results to the full group. After each group has completed their report, the full group should review the goals and combine any duplicate goals that were identified by more than one small group.

And the High-Priority Goals Are. . . .

The previous goal identification exercise most likely resulted in a large number of important goals. The challenge at this point is to strategically prioritize these goals in a manner that effectively utilizes the organization's resources (human and physical) and moves the organization toward its mission and vision.

Exercise #4: First Cut Prioritization of Goals—Nominal Group Process (20–30 minutes)

Write the goals identified by the small groups on sheets of easel paper. Give each group member five self-adhesive colored dots. Each member will use the colored dots to vote for the goals they think are most important for the organization. (Agree prior to the voting if individuals may only use one dot/goal or if they are permitted to weight their vote by using two or more dots for one goal.)

Count the number of votes each goal received. List the goals below, writing the goal that received the highest number of votes first, then the goal that received the next highest number of votes, etc.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

The number of goals your organization can effectively work on will depend on the complexity of the goals as well as the size and capacity of the group. At this point the members of the strategic planning group should review the goals and determine if there are any goals near the bottom of the list that need to be addressed because they are time sensitive or perhaps they are of critical importance to the organization. These issues will be revisited in more detail throughout the exercises in Workbook 4.

This is also a good time to do a quick reality check and ensure that the goals identified are in line with the organization's mission and vision, maximize strengths and minimize weaknesses, and take advantages of opportunities while minimizing threats.

Summary

Now that you have worked through the exercises and discussions presented above, you should have a grounded mission statement and a vision statement that will carry your organization into the next several years. You have also developed well-defined goals that are accepted by the members of the organization. These goals will provide a roadmap for programs and activities that are in line with the mission that will move the group toward the vision. This information will provide the basis for developing objectives and action plans that are necessary to achieve the goals.

About the *Choosing Our Direction* Materials

Effective groups and organizations have clear goals and objectives and are focused on working toward accomplishing these. *Choosing Our Direction* is a strategic planning tool for groups or organizations to become more effective by developing or redeveloping such goals and objectives for their future. It helps groups identify who they are, what they currently do, what they want to do in the future, and develop a usable plan for getting there. The workbooks in the *Choosing Our Direction* program were designed to be used sequentially and are intended to provide a framework for strategic planning. However, depending upon the needs of the group or organization, the workbooks can be used independently to focus on specific concerns or issues.

The workbooks in the *Choosing Our Direction* program include:

- **Setting the Stage: A Primer on Strategic Planning and Visioning (Initial assessment: Is strategic planning for your organization? What does it involve? What is the group's commitment?)**
- **#1 What Do We Do Now? (Introduction to strategic planning, assessing organizational structure)**
- **#2 What Shapes Our Future? (Forces affecting the organization; stakeholder perceptions; strengths, weaknesses, opportunities, threats)**
- **#3 What Are We Going to Do? (Goals, objectives, mission and vision exercise)**
- **#4 Making It Happen (Implementation plan; action steps; timeline; evaluation)**

No two strategic planning efforts are ever the same. Differing organizational needs and circumstances often require different strategic planning approaches. It is also important to remember that good strategic planning is never really finished—and provides for a continual process of reevaluation and refocus. The *Choosing Our Direction* workbooks are a complete strategic planning program with exercises to guide your group through this process. Depending upon the needs of your group, these workbooks can also be supplemented by additional tools and exercises. Many of these can be found at www.visioning.aers.psu.edu.

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