

CLD2-2-FCS



## Facilitator's Guide

# Visioning

## *Setting the Future for Your Organization*

### Rationale:

In order to effectively address the future, an organization cannot underestimate the important role developing a vision statement.

### Program Goal:

To develop skills and knowledge to create an effective vision statement for organizational focus and future success.

### Program Objectives:

- Define vision and describe the differences between a vision and mission statement
- Utilize a step-by-step process to develop a vision
- Develop an awareness of the pitfalls/hazards when developing a vision

### Pre-Program Preparation:

- Read and make copies of the "Visioning: Setting the Future for Your Organization" KELD fact-sheet (CLD2-2).
- Print out *Vision vs. Mission handout for Activity 1* (one per group of 3-5).
- Print copies of the *Step by Step: Create a Vision Statement Handout: Activity 2* (one per member).
- Bring pens and markers.
- Secure flip chart paper.

### Introduction

A vision transforms an organization; it offers a picture of what could be, and encourages the organization to move toward that goal. When a vision is developed utilizing a process that engages organization's members and leadership, it becomes a tool of empowerment.

### Introductory Activity

Read the following quote to the group: "*It is a terrible thing to see and have no vision.*" *Helen Keller.*

Pose the following group question for discussion:

"Describe attributes of a successful or unsuccessful group or organization" Let members respond with different attributes to introduce the importance of a clear vision within an organization.

**Respond:** "Success or failure can be tied to the vision set by the organization. Often organizations with a lack of vision or a vision not aligned with the organization's purpose can end in failure. Understanding how visioning and an effective vision statement affect the success of an organization is the first step towards empowerment and successful action in the future.

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### Objective 1: Define vision and describe the differences between a vision and mission statement

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Discuss the difference between a vision and mission statement.

**Share:** In essence, a *vision statement* can be defined as a statement outlining the desired future state of an organization. The question an organizational vision answers is – "What do we want our organization to be?" The vision reflects the core values of an organization.

### What a vision does:

- A vision serves as a catalyst for change.
- A vision links people in activities that span across the organization.
- A vision facilitates planning and goal setting.
- A vision sets priorities.

A *mission statement* describes the "business" the organization is in; the organization's products and services, the market in which it operates and the public

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image of the organization. Essentially, the mission answers the question – “Why does this organization exist?”

### **Learning Activity 1: Vision vs. Mission**

Separate the overall group into small groups of 2-4 (depending on how large the audience is). Review with the group the vision and mission statement definitions. Hand out a copy of the *Mission vs. Vision handout for Activity 1* (one per group). To fill out the worksheet, each group must decide which is a vision statement and which is a mission statement, and mark “VS” or “MS” appropriately. Once all the groups have finished, go through each example and ask a group to justify their answer to the larger group. To complete the activity, the facilitator should ask questions such as:

- Why is it important to distinguish between a vision and mission statement?
- What is the value behind a vision or mission statement?
- How does this apply to KEHA?

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### **Objective 2: Utilize a step by step process to develop a vision**

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Review the step by step process to develop a vision (listed below) to set up the visioning process.

1. **Get the right people on board.** Determine the key stakeholders that need to be part of the visioning process. Beyond employees, volunteers or team members within the organization, anyone who might have good ideas to contribute or a part to play in the implementation process should be included.
2. **Plan for an effective visioning meeting.** Several factors should be considered when planning a visioning process:
  - a. Schedule at least one-half (½) to one full day
  - b. Off-site location, if possible
  - c. For groups with several locations, a face-to-face meeting is absolutely necessary
  - d. Utilize a neutral facilitator (someone to lead the visioning process) – the organization’s leader should be an active participant in the visioning process. Involve the selected facilitator in ALL aspects of the planning process.
3. **Set the stage.** Send documents to participants to review ahead of time, encourage participants to come to the meeting prepared, consider bringing in a guest speaker or two to set the stage. All of these will provide the foundation for a successful result.

4. **At the beginning of the visioning meeting, review the agenda, process and set ground rules.** By setting the tone early, this sets the stage for how the rest of the day will flow.
5. **Develop and utilize a process that encourages full participation, openness and creativity.** Successful visions are developed using an effective and well-thought out visioning process. Below is a general example:
  - a. Explain or define a vision statement.
  - b. Either singly or in small groups have the participants brainstorm (using the following questions) – Imagine what this team or organization could look like 3-5 years from now. What would success look like? What would they love to achieve? If they were to pick up a newspaper 3-5 years from now, what would the headline say about what this group has accomplished? Allow 30 minutes.
  - c. Have each person/group report to the larger group. Make sure the leader of the organization goes last (to keep the process unbiased).
  - d. Record key phrases on a flip chart. Make sure to clarify, not evaluate.
  - e. Have participants vote on their favorite phrases.
  - f. Begin reviewing phrases that received the most votes – check for agreement. Repeat with phrases that received no/few votes. Work your way to the middle.
  - g. If consensus (on an overall vision statement) can’t be made in a timely manner, the leader needs to offer alternatives such as a small committee working on a draft and circulating it electronically for feedback, repeating the process until group consensus is reached.
6. **Communicate the vision and make it a reality.** A vision is only a daydream without set goals and action plans. Bring it alive to inspire members of your organization using images, metaphors and stories

### **Learning Activity 2: Step by Step - Creating a Vision Statement**

Hand out copies (one for every participant) of the *Step by Step: Creating a Vision Statement handout* for group members to take notes on. (Have a flip chart and markers ready to write the final vision statement on (see Step 4 on the fact sheet)).

Lead a brainstorming session utilizing the steps on page 2-3 of the fact sheet “Visioning: Setting the Future for Your Organization” (CLD2-2) to create an effective vision statement for your County Extension Homemaker Association.

**NOTE:** It is important to complete the process and display the final vision statement. If you reach a final vision statement in that same meeting, make sure you write it up on the flip chart and hang it up for all to see. If you don't reach a final vision statement at the meeting, begin the next meeting with the vision statement prominently displayed. Whatever process you decide on, it is important that the group sees the final version of the vision statement, both to provide closure for the process and to inspire movement into the future.

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### Objective 3: Develop an awareness of the pitfalls/hazards when developing a vision

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Share the pitfalls to avoid when planning for a visioning process (see below).

- Avoid a “one size fits all” statement that has a lot of shallow, nice-sounding clichés.
- Develop a vision with the intent to use it for planning or decision-making purposes (not as an empty process).
- Too many leaders try to delegate visioning to a committee. It doesn't work. There needs to be involvement from as many individuals within the organization as reasonably possible. Your team or organization needs a shared vision, not something only a few people own.
- Don't be mediocre. Invoke pride, stretch everyone's thinking, and encourage individuals' competitive emotions. Become the best at something. Inspire people.

### Learning Activity 3: Final Draft - Pitfall Free

In order to be pitfall free, your organization will need to conduct a review discussion activity.

**Instructions:** Write the vision statement your group created in Learning Activity 2 on a piece of flip chart paper. Make sure to post where all group members have a clear view. Lead the group in the following review questions:

- Can our vision statement be applied to another organization? *Remind them: If so, our work is not done and a second draft may be needed.*

- Does our organization's vision statement include a bunch of tired clichés?
- What will it take to make this vision a reality?
- Does this vision statement inspire people?
- Did enough people participate in the process? Was the process open without being tied to a decision-making process?

At the end of this review activity, ask the group if the vision statement is acceptable to the group and discuss how this process was helpful.

### Summary

Understanding the difference between a vision and a mission statement, using the right step-by-step process, and being aware of the hazards when developing an organizational vision are all important aspects to take into consideration when working to achieve the best vision possible for your organization.

### References

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Maurer, R. (2009). How to Create a Vision Statement, from the Building Capacity for Change Sourcebook. Found at: <http://www.rickmaurer.com/wp/wp-content/uploads/2011/01/CreatingVision.pdf>

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# Vision vs. Mission Handout for Activity 1

“UK HealthCare is committed to the pillars of academic health care—research, education and clinical care. Dedicated to the health of the people of Kentucky, we will provide the most advanced patient care and serve as an information resource. We will strengthen local health care and improve the delivery system by partnering with community hospitals and physicians. We will support the organization’s education and research needs by offering cutting edge services on par with the nation’s best providers.”

“The Kentucky Cooperative Extension Service serves as a link between the counties of the Commonwealth and the State’s land grant universities to help people improve their lives through an educational process focusing on their issues and needs.”

“The University of Kentucky will be one of the nation’s 20 best public research universities, an institution recognized world-wide for excellence in teaching, research, and service and a catalyst for intellectual, social, cultural, and economic development.”

“The Kentucky Cooperative Extension Service is the educational resource for all Kentuckians that serves as a catalyst to build better communities and improve quality of life.”

“The University of Kentucky is a public, research-intensive, land grant university dedicated to improving people’s lives through excellence in teaching, research, health care, cultural enrichment, and economic development.

The University of Kentucky:

- Facilitates learning, informed by scholarship and research.
- Expands knowledge through research, scholarship and creative activity.
- Serves a global community by disseminating, sharing and applying knowledge.

The University, as the flagship institution, plays a critical leadership role for the Commonwealth by contributing to the economic development and quality of life within Kentucky’s borders and beyond. The University nurtures a diverse community characterized by fairness and equal opportunity.”

“The \_\_\_\_\_ of UK HealthCare is to achieve national recognition as a Top 20 public academic health center, providing optimal multidisciplinary health care and developing advanced medical therapeutics for the people of Kentucky and surrounding regions.”

## *Vision vs. Mission Handout for Activity 1- Answers*

“UK HealthCare is committed to the pillars of academic health care—research, education and clinical care. Dedicated to the health of the people of Kentucky, we will provide the most advanced patient care and serve as an information resource. We will strengthen local health care and improve the delivery system by partnering with community hospitals and physicians. We will support the organization’s education and research needs by offering cutting edge services on par with the nation’s best providers.” **MS**

“The Kentucky Cooperative Extension Service serves as a link between the counties of the Commonwealth and the State’s land grant universities to help people improve their lives through an educational process focusing on their issues and needs.” **MS**

“The University of Kentucky will be one of the nation’s 20 best public research universities, an institution recognized world-wide for excellence in teaching, research, and service and a catalyst for intellectual, social, cultural, and economic development.” **VS**

“The Kentucky Cooperative Extension Service is the educational resource for all Kentuckians that serves as a catalyst to build better communities and improve quality of life.” **VS**

“The University of Kentucky is a public, research-extensive, land grant university dedicated to improving people’s lives through excellence in teaching, research, health care, cultural enrichment, and economic development.

The University of Kentucky:

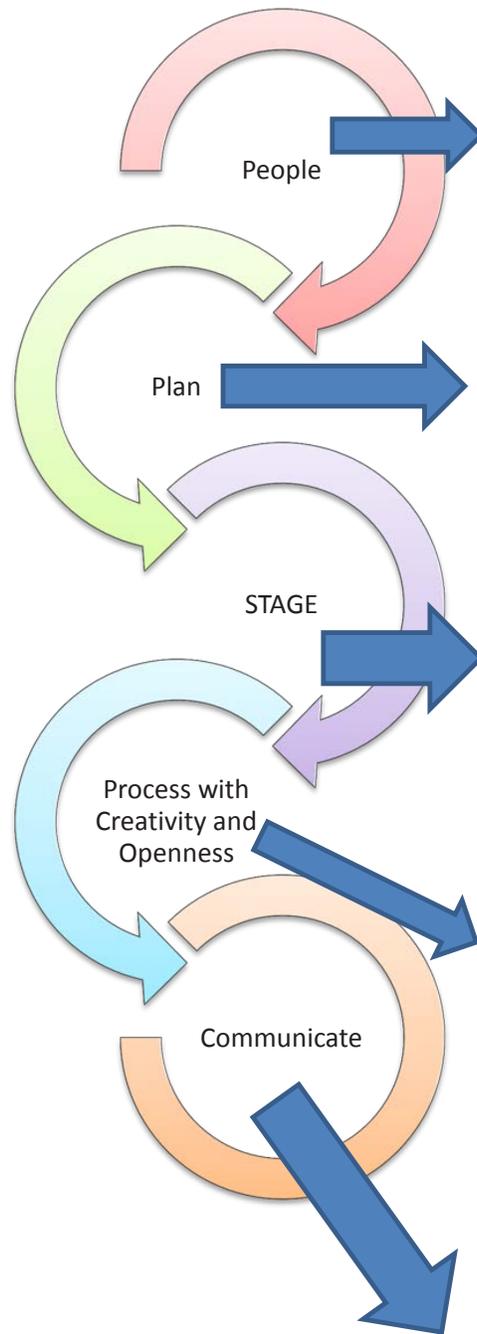
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“The\_\_\_\_\_ of UK HealthCare is to achieve national recognition as a Top 20 public academic health center, providing optimal multidisciplinary health care and developing advanced medical therapeutics for the people of Kentucky and surrounding regions.” **VS**

# Step by Step: Create a Vision Statement Handout for Activity 2

## Notes



Empty box for notes corresponding to the 'People' stage.

Empty box for notes corresponding to the 'Plan' stage.

Empty box for notes corresponding to the 'STAGE' stage.

Empty box for notes corresponding to the 'Process with Creativity and Openness' stage.

Empty box for notes corresponding to the 'Communicate' stage.