



## Facilitator's Guide

# Visioning

## *Setting the Future for Your Organization*

*It is a terrible thing to see and have no vision. —Helen Keller*

### Rationale:

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

### Program Goal:

4-H councils, clubs, and groups should develop the skills and knowledge necessary to create an effective vision statement for organizational focus and future growth and success.

### Program Objectives:

- Differentiate and describe the differences between vision and mission statements.
- Utilize a step-by-step process to create a vision statement.
- Identify the pitfalls/hazards when developing a vision statement.

### Pre-Program Preparation:

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

### Introduction:

A vision statement outlines the desired future state of an organization; it offers a picture of what could be and encourages the organization to move toward that image. When a vision statement is developed, utilizing a process that engages an organization's members and leadership, it becomes a tool of empowerment. A vision statement reflects the core values of the organization.

### 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 questions for group discussion:

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

**Respond:** "Success or failure can be tied to the organization's vision statement. Organizations without a vision statement or whose vision statement is not aligned with the organization's purpose often end in failure. Understanding how visioning and an effective vision statement affect the success of an organization is the first step toward empowerment and successful action in the future."

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This leadership curriculum was developed by 4-H Youth Development agents with University of Kentucky specialists. Examples in the guide are geared toward an 4-H audience. This guide may be reproduced or modified for educational or training purposes and used with other audiences.

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## Objective 1: To differentiate and describe the differences between vision and mission statements.

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**Discuss** the difference between vision and mission statements.

**Share:** In essence, a vision statement outlines the desired future state of an organization. The question an organizational vision statement answers is: “What do we want our organization to be?” The vision statement should reflect the core values of an organization.

What a **vision statement** does:

- Serves as a catalyst for change
- Links people to activities that span across the organization
- Facilitates planning and goal setting
- Sets priorities for the organization

A **mission statement** describes the “business” of the organization, identifies the organization’s products or services, and defines the market in which it operates and the public image of the organization. Essentially, the mission statement answers the question: “Why does this organization exist?”

### Learning Activity 1: Vision vs. Mission

Separate into small groups of two to four (depending on the size of the group). Review with the group the vision and mission statement definitions. Distribute copies of the *Mission vs. Vision Handout for Activity 1* (one per group). To complete the worksheet, each group must indicate whether each statement is a vision or a mission and mark “VS” or “MS” appropriately. When all groups have finished, review each example and ask a group to explain 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 4-H?

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## Objective 2: To utilize a step-by-step process to develop a vision statement

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Review the step-by-step process to develop a vision statement (listed below) to begin the visioning process.

- **Involve the right people in the visioning process.** Determine the key stakeholders that need to be part of the visioning process. Include Extension professionals, volunteers, council leadership, youth, elected officials, community partners,

representatives of business and industry, clergy, education, law enforcement and social services, as well as anyone who might have ideas to contribute in the implementation process.

- **Plan for an effective meeting.** The following factors should be considered when planning a visioning process:
  - » Schedule at least one half to one full day.
  - » Reserve an off-site location, if possible.
  - » For organizations with several groups or clubs, a face-to-face meeting is absolutely necessary.
  - » 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.
- **Set the stage.** Send documents (current vision and mission statements, organizational by-laws, results of a SWOT analysis or assessment inventory, etc.) to participants to review ahead of time, encourage participants to come to the meeting prepared, and consider bringing in a guest speaker or two to set the stage. All of these will provide the foundation for a successful result.
- **At the beginning of the visioning meeting, review the agenda and process and set ground rules.** Setting the tone early sets the stage for how the rest of the day will flow.
- **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:
  - » Explain or define a vision statement.
  - » Either singly or in small groups have the participants brainstorm (using the following questions). Imagine what this team or organization could look like three to five years from now. What would success look like? What would they love to achieve? If they were to pick up a newspaper three to five years from now, what would the headline say about what this group has accomplished? Allow 30 minutes.
  - » Have each person/group report to the larger group. Make sure the leader of the organization goes last (to keep the process unbiased).
  - » Record key phrases on a flip chart. Make sure to clarify, not evaluate.
  - » Have participants vote on their favorite phrases.
  - » Begin reviewing phrases that received the most votes. Check for agreement.

- » If consensus (on an overall vision statement) can't be reached in a timely manner, the facilitator should offer alternatives such as appointing a small committee to work on a draft and circulating it electronically for feedback, then repeating the process until consensus is reached.
- **Communicate the vision statement and develop an action plan to 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**

Distribute copies to each participant of the *Step by Step: Creating a Vision Statement* handout for group members to use to take notes. (Have a flip chart and markers ready to transcribe the final version of the vision statement (see Step 4 on the fact sheet).

Lead a brainstorming session utilizing the steps on pages 2 and 3 of the fact sheet *Visioning: Setting the Future for Your Organization* (CLD2-2) to create an effective vision statement for your County 4-H program.

**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 transcribe it on the flip chart and display it for all to see. If you don't reach consensus on a final vision statement at the initial meeting, begin the next meeting with the vision statement prominently displayed. Whatever process you decide to utilize, it is important that the group sees the final version of the vision statement, both to provide closure for the process and to inspire progress toward the future.

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### **Objective 3: To develop an awareness of the pitfalls/hazards when developing a vision statement.**

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Share the pitfalls to avoid when planning for a visioning process.

- Avoid a one-size-fits-all statement that includes shallow, nice-sounding clichés.
- Develop a vision statement with the intent to use it for planning or decision-making purposes (not as an empty process).

- Too often the task of developing a vision statement is delegated to a committee. That doesn't work! There needs to be involvement from as many individuals within the organization as is reasonably possible. Your team or organization needs a shared vision, not something that only a few people own.
- When developing a vision statement, be bold, forceful and forthright. Stand for something important and inspiring! Don't strive to be average or complacent. Invoke pride in the organization; encourage everyone involved in the process to be creative. Become the best at whatever your organization seeks to accomplish.

### **Learning Activity 3: Final Draft—Pitfall Free**

To be free of the pitfalls encountered when writing a vision statement, 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 or screen. Ensure that group members have a clear view. Lead the group in answering 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 tired clichés?
- What will it take to make this vision a reality?
- Does this vision statement inspire people? Does it inspire us?
- Were enough people included 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 an appropriate step-by-step process, and being aware of the hazards when developing an organizational vision statement are important aspects to consider when working to achieve the best vision possible for your organization.

## References:

- Ricketts, K. (2012) *Visioning: Setting the Future for Your Organization* (CLD2-2).  
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Kentucky Cooperative Extension Service manual (n.d.) at: <http://ces.ca.uky.edu/extensionmanual/node/7>.  
University of Kentucky Statement of Vision, Mission and Values at: [http://www.uky.edu/Provost/strategic\\_planning/files/0609Plan.pdf](http://www.uky.edu/Provost/strategic_planning/files/0609Plan.pdf).  
Mission and Vision of UK Health Care. Found at: <http://ukhealthcare.uky.edu/about/leadership/Mission—Vision.aspx#.UDsoQqBn3-Y>.  
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-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:

- 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.” **Mission**

“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.” **Mission**

“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.” **Vision**

“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.” **Vision**

“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  
Facilitates learning, informed by scholarship and research;  
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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.” **Mission**

“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**



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

People



Plan



Stage



*Step by Step: Create a Vision Statement Handout for Activity 2 - continued*

Process with  
Creativity  
and Openness



Communicate

