

# **IMLS Heritage Centers Sustainability Program**

*From Chaos to Clarity: The Importance of Vision, Mission  
and Planning for Organizational Growth*

Presented by

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Friday, October 3, 2008

10 a.m. – 3 p.m.

## **Our Agenda**

### **Welcome and Introductions**

*When you introduce yourself, please share with the group where your organization falls on the Chaos-Clarity scale!*

*(1=completely and utterly chaotic; 5=clear and focused)*

### **The Three Building Blocks of Organizational Sustainability**

- An Articulated Vision
- A Clearly Defined Mission

What are they and why are they important?

Let's take a closer look....

How do you start a conversation about vision and mission?

- A Comprehensive Plan

What is it and why is it important?

Anatomy of a planning process

Strategy development

Implementation

### **Closing Conversation**

Where do you go from here with vision, mission and planning?

# IMLS Heritage Centers Sustainability Program

## *From Chaos to Clarity: The Importance of Vision, Mission and Planning for Organizational Growth*

### SELF-ASSESSMENT

<b>Vision</b>	<b>Weak</b>	<b>Needs Work</b>	<b>Moving Towards a Strength</b>	<b>Strong</b>
My organization has a written vision statement.				
Our vision statement stretches or challenges our organization.				
Our vision statement is bold.				
My organization reviews/refines the vision statement every 3-5 years.				
My organization has talked about a vision.				

What can my organization address in the next 12 months regarding vision:



<b>Mission</b>	<b>Weak</b>	<b>Needs Work</b>	<b>Moving Towards a Strength</b>	<b>Strong</b>
My organization has a written mission statement.				
Our mission states how the organization relates to its community.				
Our mission states what the organization's public benefit is.				
Our mission states what services our organization provides.				
My organization reviews/refines the mission statement every 3-5 years.				
My organization has talked about a vision.				

What can my organization address in the next 12 months regarding its mission statement:



<b>Planning</b>	<b>Weak</b>	<b>Needs Work</b>	<b>Moving Towards a Strength</b>	<b>Strong</b>
My organization has a comprehensive written plan for the next 3-5 years.				
My organization uses its plan to guide its work.				
My organization uses its plan to build its board.				
Our plan is updated annually.				
My organization regularly solicits community input in its planning.				

What can my organization address in the next 12 months regarding comprehensive planning:



## ➤ **The Checklist to Use When Drafting a Compelling Vision Statement**

The purpose of vision is to create the future. It is about a state of being at some point in the future.

The Vision Statement creates images of the desired future. It is unencumbered by how you will achieve it.

Vision is the future focused and positive, it does not fix things that are currently wrong or bad in an organization or community.

Vision is conceptual, but it is also practical.

Vision is specific, distinctive, comprehensive, customized, detailed and unique to a given organization.

Risk is a natural and an unavoidable outgrowth of vision. It is not safe or easy. It is better for vision to be too great than not great enough.

Vision, when properly articulated, does not make people afraid or doubtful, instead it is magnetic and exciting, positive and inspiring.

Vision will cause consensus.

Vision is not constrained by time, it usually outlasts the visionary. You may not see it all the way to fruition.

*List compiled by Wayne Vick, President of Vick Associates (703-913-6513), and printed in the September, 1998 issue of The Facilitator.*

### **The most effective visions**

- are ambitious enough to force people out of comfortable routines
- aim in a general way at providing better and better products and services
- take advantage of fundamental trends, especially new technologies
- make no attempt to exploit anyone and thus have a certain moral power

*From: John P. Kotter, Leading Change. Boston: Harvard Business School Press. 1996. ISBN:0-87584-747-1. p. 79.*



**When you've drafted your vision statement, ask yourselves these four questions:**

1. Does the statement stretch, challenge or innovate?
2. Is the statement grounded in real-life examples; can it, in fact, be achieved?
3. Is it what you want? Are you passionate about it?
4. Is it stated in affirmative, bold, present tense terms, as if it were already happening?

*From: Quality Management to a Higher Power (QM2), Building On Your Strengths*

➤ **Characteristics of an Effective Mission Statement**

A good mission statement conveys:

- how the organization relates to its publics and communities
- how it enhances the well-being of others and improves the quality of life
- who benefits as a result of its work
- what service it provides

If your mission statement takes an inward focus rather than an outward-looking stance, your organization will make decisions without relating itself to the external environment and without seeking information about its market niche.

Decisions in nonprofit organizations affect the public, cost money, and require substantial commitment of time by board members, staff, and volunteers. It is shortsighted to make decisions with little or no knowledge of the prospective audience or program recipient.

Most mission statements fall short because they simply list organizational activities and fail to identify a greater purpose or intended audience. They are uninspiring and vague, and many sound formulaic.

Check your mission statement frequently to gauge its relevance and clarity. Make sure it includes the two most critical elements: why the organization exists and for whom.



A well-crafted and well-used mission statement is a key governance and management tool.

*From: Gail Anderson, Editor. Museum Mission Statements: Building a Distinct Identity. Professional Practice Series. Washington, DC: American Association of Museums. 1998. ISBN: 0-931201-44-6.*

➤ **Let's take a closer look....**

**Group A:**

**North Country Underground Railroad Historical Association**

**Our Vision**

We inspire all people to rise above their differences and celebrate the importance of freedom to the survival of the human spirit.

**Our Mission**

Our mission is to research, preserve, interpret, and promote the Underground Railroad history of North-eastern New York's Waterways to Freedom and to celebrate the importance of that history and its relevance and significance to our own time.

We recognize the Champlain Line of the Underground Railroad as North-eastern New York's extension of the Eastern Seaboard Route to Canada. We celebrate the lives of abolitionists and Freedom Seekers of the Upper Hudson River-Champlain Canal-Lake Champlain Corridor in New York's contiguous counties of Washington, Saratoga, Warren, Essex, Clinton and Franklin. While we focus on the regional nature of our UGRR history, we advance it as a movement of national and international importance.

**Marcella Sembrich Opera Museum**

**Mission Statement**

MSMA, founded in 1940, honors international opera singer Marcella Sembrich (1858 - 1935) at her teaching studio and woodland retreat on Lake George where her impact upon the world of music continues. MSMA uses this breathtaking location to educate, entertain, and inspire audiences with multi-sensory opportunities that enhance appreciation of classical music and the arts, encourage knowledge of Sembrich's significant contributions to musical history, and preserve Sembrich's legacy with its museum collection, educational programs, and public performances.



## **Brookside: Saratoga County Historical Society**

### **Our Vision**

Brookside inspires community memory and enrichment by telling the story of Saratoga County through interactive and engaging programs and exhibits.

### **Our Mission**

We believe that local history is vital to the growth of communities and the individuals who live in those communities. Local history builds community, allows exploration and discovery about our communities and heritage, exercises imaginations, and provides context and inspiration for new goals and new growth. With these thoughts it is our mission to do the following:

- To make the unique history of Saratoga County a part of everyday life for every person in our county.
- To promote further understanding, appreciation, and enjoyment of Saratoga County history by people of all ages, backgrounds, and levels of interest through educational programs, innovative exhibits, ambitious web programming, personal experiences, and enduring relationships.
- To preserve and enhance our collections, programs, and historic structure.
- To provide interactive, educational programming at our museum, in our community, and on our web site.
- To conduct and publish research in the field of Saratoga County history through our exhibits, programs, publications, and web site. To foster research in this field through access to our library and collections.
- To contribute, as a regional attraction, to the cultural life and prosperity of Saratoga County.

## **Group B:**

### **A County Historical Society**

Our mission is the storage and preservation of books and documents pertaining to the history of our county, the dissemination of information about this history, and the conduct of educational programs at the five centers that we own or manage.

### **A Town Historical Society**

The ABC Historical Society shall bring together those persons interested in the discovery, collection, and preservation of historical materials as they relate to the Town of ABC and AB County, New York. The Society shall also encourage and promote the preservation of historical buildings, cemeteries, monuments, and markers of local importance.



## **An Historic House Museum**

The Smith-Jones House Association, Inc., is committed to the preservation, conservation, and restoration of its buildings, grounds, and collections to be shared with the public for its education and enjoyment.

### **➤ How do you start a conversation about vision and mission?**

At a retreat or over a series of board meetings:

Ask each participant to talk about why they care about the organization – make a list of responses and compare them to what you say in your vision/mission statements

Use the checklists in this packet to evaluate your vision/mission statements. Do they work as hard at describing your organization as you do working for it?

Compare/contrast your vision and mission statements with those from other organizations – what's missing?

### **➤ What is comprehensive planning and why is it important?**

Survival

Achieving the mission

Reality check

Focus

Consensus and ownership

Effectiveness

Leadership review

Other reasons why it is important?



## ➤ **Brief overview of planning approaches and terms**

The Intuitive Approach  
Crisis Management Approach  
Long Range Planning  
Strategic Planning

Vision

Mission

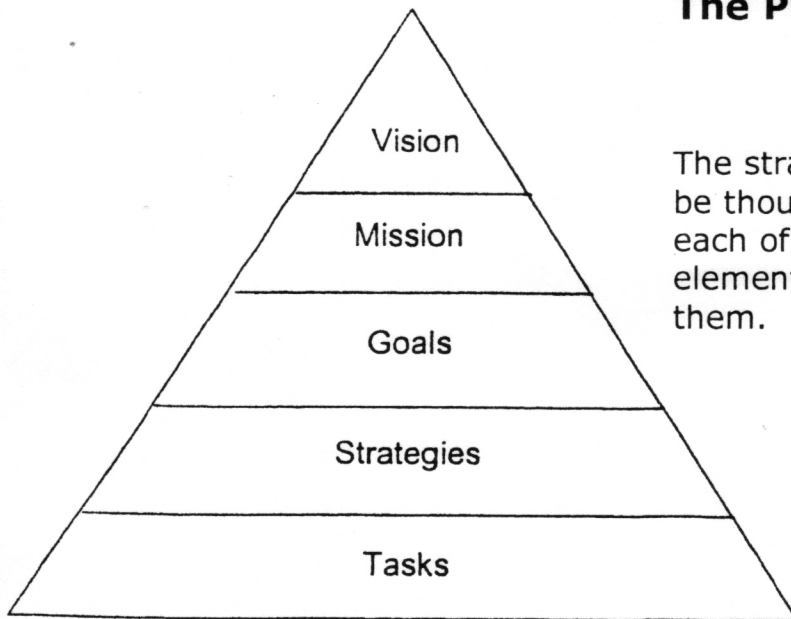
Goals: strategic goals and business goals

Strategies: activities that are chosen to meet goals

Tasks: specific steps that make up each activity



## The Planning Pyramid



The strategic planning process can be thought of as a pyramid, where each of the content/process elements supports those above them.

An organization's **mission** supports its **vision**. These two elements need to work in creative tension with each other – that is, the vision should be large enough so that the mission is always being stretched positively to achieve it.

**Goals** support an organization's mission and vision. A small number of goals that address the most critical issues facing the organization is ideal. Too many goals and the strategic nature of the process is lost.

**Strategies** are those activities that will achieve goals when undertaken in a systematic way over a period of time. Strategies need to be broken down into their component parts (or **tasks**), assigned to individuals, committees, or work groups, and given timeframes for their implementation.

**Tasks** become the annual work plan or implementation plan for the organization. Plans often fail because they don't address the task level of detail. However, it is the identification of tasks that forms the all-important base of the pyramid.

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# **Basic Planning Process** Checklist and Timetable

Planning Activity	Activity Completed By	Who Responsible?
Organizational Self-Assessment  Determining the strengths and weaknesses of organization infrastructure		
Community Assessment  Understanding your competition and defining existing and potential opportunities using surveys, focus groups, town meetings, and other techniques		
Other Assessments/Research  Amassing additional information that helps to refine the context of your planning, such as MAP reports, Historic Structure and Landscape Reports, collection surveys and conservation reports; marketing plans, fundraising plans, board skills inventory, etc.		
Visioning  Developing a compelling picture of the organization's future		
Aligning Mission  Re-examining the current mission statement to ensure that it supports the vision and that it accurately addresses the what, why, and how of the organization		
Developing a Statement of Organizational Values  How we want to act, consistent with our mission along the path toward achieving our vision		



Setting overarching goals that support mission and vision Effective plans have a limited number of: Strategic Goals: help move the organization from mission to vision and Business Goals: enable the organization to fulfill its mission		
Establishing strategies to achieve goals Limited in number, prioritized, and time-framed (short-term, mid-term, long-term) over the life of the plan		
Creating an annual workplan A comprehensive, step-by-step, calendared list of tasks that will accomplish the short-term strategies for the coming year, with completion deadlines and parties responsible for completion identified		
Updating the Strategic Plan and annual workplan		

Template developed by  
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## ➤ **Developing Criteria to Help You Choose Directions**

To get you thinking about criteria for evaluating and measuring strategies and tasks, here's a trigger question: "If a critical activity were to come in the door right now, how would we recognize it? What would be its characteristics?"

For example, is the strategy

- within mission of the organization?
- getting us closer to our vision?
- dealing significantly with challenges?
- easy to implement?
- one that has the enthusiasm of a majority of stakeholders behind it?
- an activity that moves strategic goals forward simultaneously?
- financially possible to implement?
- doable because there are people resources and energy available to implement it?
- potentially capable of creating a ripple effect - causing other projects move forward with little effort?
- on the upswing of a trend?
- within budget?
- one that creates/builds audience or grows membership?
- one that builds funding streams?
- one that grows donors?
- one that improves programs?
- one that builds the organization's image?
- capable of generating collaborations & partnerships?
- necessary to honoring existing commitments?
- critical to maintaining the integrity of a full continuum of service?
- filled with potential to create new opportunities or expand on existing ones (develop fruitful relationships, generate resources)?
- one that we are uniquely positioned or capable of doing (the rest of the system is counting on us to do it)?
- likely to generate new revenues, relationships, capabilities or other resources that will support our ability to achieve our most fundamental objectives?
- one that the cost of not doing it is acceptable?
- makes a necessary contribution to the discipline?
- consistent with the values and principles of the organization?
- positions the organization in a strategically advantageous light in the minds of our most important stakeholders (funders)?



## Strategic Planning Benefits and Concerns

(worksheet from: *Strategic Planning Workbook for Nonprofit Organizations*, published by the Amherst H. Wilder Foundation, St. Paul, MN. 1986.)

### Instructions

1. List the benefits you expect from strategic planning as well as any concerns you have about undertaking planning.
2. Note possible ways to overcome each of your concerns. Circle the best ideas.
3. Decide how you will proceed.

Planning will provide the following benefits:	Concerns about undertaking planning:	Ways to overcome concerns:

### DECIDE HOW YOU WILL PROCEED:

- ☐ Full Steam Ahead
- ☐ With caution, addressing concerns above
- ☐ Wait until a better time to begin
- ☐ Stop - don't proceed