

KEY CONCEPTS IN STRATEGIC PLANNING: PURPOSE, MISSION, VISION, AND VALUES

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The only thing that works is management by values. Find people who are competent and really bright, but more importantly, people who care exactly about the same things you care about.

--Steve Jobs

In my experience working with organizations in the development a Strategic Plan, I often find that the process can bog down due to confusion regarding terminology (i.e., what constitutes a Mission Statement as compared to a Vision, or to Core Values). My purpose in writing this article is to clarify the various concepts and provide examples from different industries so that it might serve as a framework that can guide your planning efforts.

DEFINITION OF TERMS

Purpose Statement—*Why* you exist, your reason for being, the fundamental role your organization/company/brand plays in the world.

A good purpose statement is broad, fundamental, inspirational, and enduring.

Sample Purpose Statements:

Apple: *To make a contribution to the world by making tools for the mind that advance humankind.*

National Organization of Women: *The purpose of NOW is to take action to bring women into full participation in the mainstream of American society now, exercising all the privileges and responsibilities thereof in truly equal partnership with men.*

American Nurses Association: *Dedicated to ensuring that an adequate supply of highly-skilled and well-educated nurses is available, ANA is committed to meeting the needs of nurses as well as health care consumers. ANA advances the nursing profession by fostering high standards of nursing practice, promoting the economic and general welfare of nurses in the workplace, projecting a positive and realistic view of nursing, and by lobbying the Congress and regulatory agencies on health care issues affecting nurses and the general public.*

Innovation is a way of life at 3M, *and ideas are constantly in motion. Every day, we work to solve problems by applying creativity and ingenuity to make life easier.*

Greenpeace: *We defend the natural world and promote peace by investigating, exposing and confronting environmental abuse, and championing environmentally responsible solutions.*

Association of California School Administrators (ACSA): *To preserve and improve the quality of life through public education.*

Mission Statement—Who you are, what you do, for whom, and how you do it differently.

A Mission Statement describes what business you're in and who your customer is. As such, it captures the very essence of your enterprise—its relationship with its customer. Focus is a primary benefit of your mission statement. It should be broad enough to allow for the diversity (new products, new services, new markets) you require of your business. It should also be specific enough to provide the focus necessary to the success of your business.

Sample Mission Statements:

Facebook's mission is to give people the power to share and make the world more open and connected.

Google's mission is to organize the world's information and make it universally accessible and useful.

Ben & Jerry's Product Mission: To make, distribute and sell the finest quality all natural ice cream and euphoric concoctions with a continued commitment to incorporating wholesome, natural ingredients and promoting business practices that respect the Earth and the Environment.

Ritz-Carlton Hotel—CREDO:

The Ritz-Carlton Hotel is a place where the genuine care and comfort of our guests is our highest mission.

We pledge to provide the finest personal service and facilities for our guests who will always enjoy a warm, relaxed, yet refined ambience.

The Ritz-Carlton experience enlivens the senses, instills well-being, and fulfills even the unexpressed wishes and needs of our guests.

San Francisco AIDS Foundation works to end the HIV epidemic in the city where it began, and eventually everywhere. Established in 1982, our mission is the radical reduction of new infections in San Francisco because we refuse to accept HIV as inevitable. Through education, advocacy and direct services for prevention and care, we are confronting HIV in communities most vulnerable to the disease.

The mission of The Metropolitan Museum of Art is to collect, preserve, study, exhibit, and stimulate appreciation for and advance knowledge of works of art that collectively represent the broadest spectrum of human achievement at the highest level of quality, all in the service of the public and in accordance with the highest professional standards.

PBS' mission is to create content that educates, informs and inspires. To do this, PBS offers programming that expands the minds of children, documentaries that open up new worlds, non-commercialized news programs that keep citizens informed on world events and cultures and programs that expose America to the worlds of music, theater, dance and art.

Vision Statement—Where you are going, the direction you are taking, the destination you imagine.

An effective Vision projects a compelling story about the future. It appeals to long-term interests of major stakeholders (current and prospective clients, employees, stockholders, etc.) The Vision

reflects ambitious yet achievable goals. It is both focused yet flexible, clear and easy to communicate.

Characteristics of an Effective Vision

- Futuristic—Does it describe a clear picture of the future?
- Compelling—Does it motivate people to action?
- Desirable—Does it appeal to all major stakeholders?
- Realistic—Is it achievable and credible?
- Clear and focused—Does it clarify what is important and what isn't?
- Flexible—Can it be implemented in a way that accounts for changing circumstances?
- Easy to communicate—Does it speak to tangible benefits and engage people in an emotional way?

Unlike Purpose, Mission and Core Values, all of which are ongoing and enduring, Visions are meant to be pictures of the future that could actually be realized.

On May 25, 1961, President John F. Kennedy articulated the Vision of “landing a man on the moon and returning him safely to earth” by the end of the decade. That “one small step” was accomplished on July 20, 1969.

In 1909, Henry Ford said, "I'm going to democratize the automobile. When I'm through, everybody will be able to afford one, and about everybody will have one." Within five years—through the efficiencies of the assembly line—production of the Model T increased by 100 percent, the price was slashed to \$99, and Ford's U.S. market share rose to 48 percent.

Other examples of Vision Statements include:

- *To be earth's most customer centric company; to build a place where people can come to find and discover anything they might want to buy online. (Amazon)*
- *We want to be the best advertising agency in the world, as judged by our peers, based on the quality and effectiveness of our work. (Goodby, Silverstein & Partners)*
- *To be the world's preeminent health sciences innovator. (University of California—San Francisco)*

Core Values are the organization's essential and enduring tenets—a small set of timeless guiding principles that require no external justification; they have *intrinsic* value and importance to those inside the organization.

Core Values are deeply held beliefs that are not just aspirations, but are actually reflected in how your organization functions. These are the values that are so fundamental that even if they proved to be a disadvantage in some way, you would still not change them.

Effective organizations are guided by a clear and concise set of Core Values that create shared meaning and provide direction so that everyone understands how to contribute and how to succeed. Once defined, Core Values impact every aspect of your organization.

- Organizational goals are grounded in the identified Core Values.
- Core Values guide every decision that is made.
- Core Values help each person establish priorities in their daily work life.
- Rewards and recognition within the organization are structured to recognize those people whose work embodies the Core Values.

To test whether your Core Values are the most fundamental and enduring complete the following statement,

Our organization always has been, still is, and always will be _____.

For example:

- *Nordstrom always has been, still is, and always will be committed to offering the customer the best possible service, selection, quality and value.*
- *The Walt Disney Company always has been, still is, and always will be in the business of making people happy.*
- *Apple always has been, still is, and always will be at the intersection of technology and liberal arts, to be able to get the best of both, to make extremely advanced products from a technology point of view, but also have them be intuitive, easy to use, fun to use, so that they really fit the user. The users don't have to come to them, they come to the user.*

Sample Core Values:

- *Apple (Tim Cook statement to investors in January 2009)*
 - *We believe that we're on the face of the earth to make great products and that's not changing. We're constantly focusing on innovating. We believe in the simple, not the complex.*
 - *We believe we need to own and control the primary technologies behind the products that we make and participate only in markets where we can make a significant contribution.*
 - *We believe in saying no to thousands of projects so that we can focus on the few that are meaningful to us. We believe in deep collaboration and cross pollination in order to innovate in a way others cannot.*
 - *We don't settle for anything other than excellence in any group in the company, and we have the self-honesty to admit when we're wrong and the courage to change.*
- *Google—Ten things Google has found to be true*
 1. *Focus on the user and all else will follow.*
 2. *It's best to do one thing really, really well.*
 3. *Fast is better than slow.*
 4. *Democracy on the web works.*
 5. *You don't need to be at your desk to need an answer.*
 6. *You can make money without doing evil.*
 7. *There's always more information out there.*
 8. *The need for information crosses all borders.*

9. *You can be serious without a suit.*
10. *Great just isn't good enough.*

- *The six values that "drive" Mercedes-Benz USA are:*
 - *The audacity to reject compromise*
 - *The instinct to protect what matters*
 - *The commitment to honor a legacy*
 - *The vision to consider every detail*
 - *The foresight to take responsibility*
 - *The ingenuity to outperform expectations*

This final section will show you how all the concepts work together in a completed document, courtesy of one of my clients with whom I had the great pleasure of facilitating their Strategic Planning Process.



MONTEREY COUNTY HEAD START PROGRAM

PURPOSE

To facilitate school readiness for children and support greater self-reliance for Head Start families.

MISSION

Through teamwork, Monterey County Head Start is committed to children and families, and in partnership with the community, provides the highest quality education and services.

VISION

To be recognized as leaders in child and family development by providing the highest-quality, comprehensive, seamless services based on community assessment.

CORE VALUES

***We believe** that children and families come to our program with unique backgrounds, positive experiences and strengths.*

***We are committed** to working in full participation with families to support them in meeting their individual needs, and their child and family development goals.*

***We believe** parents are the primary educators and nurturers of children, and that children develop in the context of their family and culture.*

***We are committed** to providing opportunities that enhance and support each family's capabilities to continue to teach their children, and engage in life-long learning for themselves.*

***We believe** that children of all ability ranges should have equal opportunities to participate in school success.*

***We are committed** to providing safe, well-designed, nurturing and engaging learning environments in all of our program options.*

We believe that good nutrition and sound health practices are key elements to ensure optimum social and emotional development, and school readiness.

We are committed to promoting healthy eating and lifestyle principles throughout our programs.

We believe that we are in the business of making a positive impact in the community.

We are committed to ongoing assessment of community needs to guide us in our planning and decision making so that we allocate resources appropriately.

We believe that the cultural and linguistic diversity of our community is a strength to be respected and celebrated.

We are committed to honoring the diversity of our community by ensuring that it is reflected in all aspects of our program.

We believe that services are best provided in a collaborative environment where everyone is aligned in meeting the needs of children, families and staff.

We are committed to respecting, supporting and empowering each person's contribution to the team.