

Getting Your Bearings

Who Are You and What Is Your Environment

Getting your bearings with respect to your community and organizations involves knowing who you are, the change you want to create, and the environment in which you are working. You may already have a clearly and consensually developed value statement, vision and mission. If so, use it as your starting point. If not, consider an organizational planning process to develop one. (Tool 1)

Who Are You?

The Change cycle starts with knowing who you are – your mission. A *mission statement* should be succinct and give clear, compelling direction. It should answer the following questions:

- Who are we?
- What community needs do we exist to fulfill?
- How do we recognize and respond to those needs?
- How do we engage stakeholders?
- What is our philosophy of service or core values?
- What makes us unique?

Most community organizations are principle-based whether they state these principles explicitly or not. Stating these principles helps an organization maintain integrity. *Principle statements* should include how you work with participants, staff and the community.

What Community Change Do You Seek?

When you are clear about who you are and what you do, it is easier to state the difference you want to make – your *Organizational Vision*.

There are many ways to write a vision statement. Some organizations develop clear, succinct one sentence descriptions of the preferred future that they are contributing to. Others described the preferred future in several paragraphs. An inspiring vision has these characteristics:

- focuses on a better future
- encourages hopes and dreams

- appeals to common values
- is outcome oriented
- emphasizes group assets, and
- inspires enthusiasm and excitement

You now have the key elements of a *change statement*: your mission, principles and vision.

Every change statement should have the following qualities:

- Be based on an analysis of your community context and mandate
- Focus on the change to be created rather than the activities
- Be visible at all levels of the organization, documents, manuals, waiting rooms
- Connect every policy, program, job description, activity and evaluation process

This change statement can now be used as a reference point for all programs. You can refer back to this section after you have completed your outcome measurement framework.

What is the Environment You Are Working In?

It is important to plan for the future strategically, looking inward and outward to identify opportunities and constraints that might positively or negatively affect your agency and program. Knowing these influences will help you plan with your eyes open. Because you are starting with who you are, it is important to think of these opportunities and constraints in light of your values, vision and mission. (Tools 2)

“There must be systematic encouragement to think the unthinkable and to dream.”

– John Carver

“If you want to move people, it has to be toward a vision that’s positive for them, that taps important values, that gets them something they desire, and has to be presented in a compelling way that they feel inspired to follow.”

– John Carver

*“You can observe
an awful lot just by
watching.”*

– Yogi Berra



EXAMPLE

Pacific Community Resource Society Mission

Our mission is to work in partnership with communities, other agencies and government ministries to develop and ensure access to responsive, effective and accountable quality services for children, youth, adults and families. We strive to assist individuals and families to enhance their social, emotional, educational and economic well being.

Organizational Principles

- Developmental and Bio-Psycho-Social Assessment
- Individualization
- Nurturing and Safety
- Consistency
- Rights
- Role Models
- Family/Youth Support and Community Building

Pacific Community Resource Society Vision

Our vision is one of healthy, civic and productive people living in socially sustainable, safe and caring communities.

Tool 1

Starting with Who You Are and What You Do

Purpose

To help ground your program in your overall organizational mandate and direction.

Description

There should be a strong relationship between your organizational mandate and the outcomes you plan to achieve through this program. Whether it has been written down or not, most organizations have a mission, vision and values that guide their work. This tool assesses the relationship between what you propose to do in your project and the vision, mission and values of your organization.

When to Use

- At the beginning of a new project
- When establishing or clarifying future directions

How to Use

Go through that steps with a planning group comprised of management, staff, and , where appropriate, community members.

For Step 1, you will need to have copies of your mission, vision and values.

For Step 2 will require some soul searching and discussion about the relationship between your organizational direction and the outcomes you plan to achieve.

Step 3 involves a series of questions about the degree of fit between your program and your mission, vision, and values.

Step 4 walks you through a discussion of possible strategies to follow depending on your answers in Step 3.

Step 1: Clarifying What You Stand For

If your mission, vision, and values are already written down in a strategic plan, make copies for each participant in the planning process and move to the next step.

If your organization has not set in writing who you are and what you do, facilitate planning process participants to quickly sketch out what participants know deep inside about what you are and what you do.

Mission (Who, What, Where, and Why of What You do)

Vision (the change you are working to create)

Values (How you approach your work)

Step 2: Comparing your Program to What Your Organization Is About

Use the following matrix to describe the relationship between your outcome measurement framework (OMF) and who you are.

	What the OMF Reflects	What the OMF Does Not Reflect
Mission		
Vision		
Values		

Step 3: Analyzing the Fit

Now is the time to examine the degree to which this program fits with your organization and how. Consider the following questions:

Mission

- How does this program help you fulfill your mission?
- Is the program central to the fulfillment of your organizations mission or is it supplementary?
- If central to your mission, how?
- If supplementary, what is the relationship between the program and the central mandate?
- What part of your mission is not being fulfilled
- What part of the program is not part of your mission?
- Are there other groups with a complementary mission?

Vision

- How does this program contribute to your organization's ability to move toward its vision?
- How does this program detract from your organization's ability to move toward its vision?
- What else needs to happen before this vision can be fulfilled?

Values

- How will this program operationalize the organizational values on a day to day basis?
- What activities need to be included to ensure that the program expresses the organizational values?

Step 4: Review Your Outcome Measurement Framework

Take stock of your project in light of this analysis and determine if follow-up action is required. Some ideas of follow-up action that could be suggested by the analysis are:

- stay the course, there is a good match between your organization and your program
- make some changes in the outcome measurement framework to better support the program to fulfill its mission and vision or express the organizational values
- enter into partnership with another organization that has a mission that fits with program elements that do not fit yours; or
- abandon the program as unrelated to your mission, vision, and values.

Tool 2

Assessing Your Environment Looking Outward and Looking Inward

Purpose

To help your organization consider the existing opportunities and constraints in its environment; and the skills, strengths, and resources within the organization. This analysis will ensure that any project proposal is grounded in an assessment of current realities while remaining true to the organization's long-term vision.

Description

The tool is divided into strategic questions to guide discussion among the members of your organization and its stakeholders and a summary table to connect this process to subsequent phases.

When to Use

At the beginning of any new major programming initiative; to clarify direction in the face of a major turnover of board and/or staff; to refresh intent at board/staff retreats; and as a board checklist for approval of new proposals, to ensure the overall work of the organization remains on track. It is important

to ensure that the response to each question is congruent with the responses that have been generated during your planning and implementation process.

If these questions are not asked or revisited regularly as part of your organization's work, you run the risk of heading in unintended directions and minimizing your own long term impact in the community.

How to Use

In Step 1, use the first set of questions look at how the internal workings of the organization are related to the organization's strategic direction and values. Then use the second set of questions to look at how the projects, partnerships and external efforts of the organization relate to the organization's strategic direction and values.

Step 2, provides a frame to summarize key opportunities and constraints that emerge from this review.

Step 1: Reviewing Internal and External Environments

The first set of questions look at how the internal workings of the organization are related to the organization's strategic mission, vision and values. The second set of questions look at how the projects, partnerships and external efforts of the organization match up.

Looking Inward

Mission, Vision and Values

Internal Context

- What are the opportunities, strengths and abilities within your organization? When has the organization demonstrated these in the past?
- How can the strengths and abilities previously demonstrated be used to overcome current challenges?
- How can you design your project/program to take advantage of internal strengths and abilities, and minimize the challenges that will arise with your vision?

Governance

- What are the roles of the board or advisory group in your organization? What are the roles of management? Of the staff? How do these differ from each other, and is there agreement on these differences?
- Is the organization governed, managed and staffed by people who share and model the values the organization hope to promote in the community?
- Where does leadership reside within the organization?
- Is it commonly understood that Outcome Measurement is a responsibility that is shared by the board or advisory group, management, and staff & volunteers [which may include board members in a program delivery role]?

Communication

- How does communication work between the board/advisory group, management, staff and volunteers in your organization?
- What are the verbal and non-verbal messages being communicated within your organization about its values?

Looking Outward

Mandate, Mission and Values

Participation

- Who are the people and organizations in your community who have the power to help or hinder your efforts? How will you build positive relationships with them from the start? What steps can you take to ensure that as many of these people remain involved as possible?

External Context

- What are the opportunities, strengths and abilities in your local community that can help to achieve that vision?
- What forces in the community might work against your vision?
- How can you design your project/program to take advantage of external strengths and abilities, and external opportunities that will arise, and minimize the forces working against your vision?
- What are the major issues in your community?
- What organizations are currently working in this area? Are there any gaps in programming?
- Is your organization well suited to filling the gap(s) (in view of our strategic direction and values)?
- How could you do so (what projects will work best with your organizational strengths)?

Partnerships and Communication

- What values and messages are being communicated by your choice of partners?
- What values and messages are being communicated by the agreements and relationships you have with your partners, and by the ways you work together?
- What are the verbal and non-verbal messages being communicated by your organization about its values and commitment to diversity in its projects, and its relationships in the community?

Step 2: Summarizing Opportunities and Constraints

From this analysis, summarize key opportunities and constraints in the internal and external environments and identify potential actions to take advantage of these opportunities while minimizing the impact of the constraints.

Looking Inward

Opportunities	Constraints	Actions Needed to Maximize/Minimize

Looking Outward

Opportunities	Constraints	Actions Needed to Maximize/Minimize