

Question 1: What Is Our Mission?

**Worksheet 1.1:
What Is Our Current Mission?**

**Worksheet 1.2:
Does Our Mission Need to Be Revisited?**

**Worksheet 1.3:
What Are the Emerging Trends That Will
Have the Greatest Impact?**

**Worksheet 1.4:
What Are Our Opportunities?**

Question 2:
Who Is Our Customer?

Question 3:
What Does the Customer Value?

Question 4:
What Are Our Results?

Question 5:
What Is Our Plan?

<http://www.pbookshop.com>

Question 1:

What Is Our Mission?²

Each social sector institution exists to make a distinctive difference in the lives of individuals and in society. Making this difference is the mission—the organization’s purpose and very reason for being. Each of more than one million nonprofit organizations in the United States may have a very different mission, but changing lives is always the starting point and ending point. A mission cannot be impersonal; it has to have deep meaning, be something you believe in—something you know is right. A fundamental responsibility of leadership is to make sure that everybody knows the mission, understands it, lives it.

Many years ago, I sat down with the administrators of a major hospital to think through the mission of the emergency room. As do most hospital administrators, they began by saying, “Our mission is health care.” And that’s the wrong definition. The hospital does not take care of health; the hospital takes care of illness. It took us a long time to come up with the very simple and (most people thought) too-obvious statement that the emergency room was there *to give assurance to the afflicted*. To do that well, you had to know what really went on. And, to the surprise of the physicians and nurses, the function of a good emergency room in their community was to tell eight out of ten people there was nothing wrong that a good night’s sleep wouldn’t fix. “You’ve been shaken up. Or the baby has the flu. All right, it’s got convulsions, but there is nothing seriously wrong with the child.” The doctors and nurses gave assurance.

We worked it out, but it sounded awfully obvious. Yet translating the mission into action meant that everybody who came in was seen by a qualified person in less than a minute. The first objective was to see everybody, almost immediately—because that is the only way to give assurance.

It Should Fit on a T-Shirt

The effective mission statement is short and sharply focused. It should fit on a T-shirt. The mission says *why* you do what you do, not the means by which you do it. The

mission is broad, even eternal, yet directs you to do the right things now and into the future so that everyone in the organization can say, “What I am doing contributes to the goal.” So it must be clear, and it must inspire. Every board member, volunteer, and staff person should be able to see the mission and say, “Yes. This is something I want to be remembered for.”

To have an effective mission, you have to work out an exacting match of your opportunities, competence, and commitment. Every good mission statement reflects all three. You look first at the outside environment. The organization that starts from the inside and then tries to find places to put its resources is going to fritter itself away. Above all, it will focus on yesterday. Demographics change. Needs change. You must search out the accomplished facts—things that have already happened—that present challenges and opportunities for the organization. Leadership has no choice but to anticipate the future and attempt to mold it, bearing in mind that whoever is content to rise with the tide will also fall with it. It is not given to mortals to do any of these things well, but, lacking divine guidance, you must still assess where your opportunity lies.

Look at the state of the art, at changing conditions, at competition, the funding environment, at gaps to be filled. The hospital isn't going to sell shoes, and it's not going into education on a big scale. It's going to take care of the sick. But the specific aim may change. Things that are of primary importance now may become secondary or totally irrelevant very soon. With the limited resources you have—and I don't just mean people and money but also competence—where can you dig in and make a difference? Where can you set a new standard of performance? What really inspires your commitment?

Why Does the Organization Exist?

Defining the nonprofit mission is difficult, painful, and risky. But it alone enables you to set goals and objectives and go to work. Unless the mission is explicitly expressed, clearly understood, and supported by every member of the organization, the enterprise is at the mercy of events. Decision makers throughout will decide and act on the basis of different, incompatible, and conflicting ideas. They will pull in opposing directions without even being aware of their divergence, and your performance is what suffers. Common vision, understanding, and unity of direction and effort of the entire organization depend on defining the mission and what the mission *should* be.

Refining the Mission Statement³

Every three to five years, you should look at the mission again to decide whether it needs to be refocused because the demographics of your customers have changed, because you should abandon something that produces no results or needs resources beyond the organization's competencies, or because the objective has been accomplished.

You must think through priorities. That's easy to say, but to act on it is very hard because doing so always involves abandoning things that may look attractive, or giving up programs that people both inside and outside the organization are strongly encouraging you to keep. But if you don't concentrate your institution's resources, you are not going to get results. This may be the ultimate test of leadership: the ability to think through the priority decision and to make it stick.

Make Principled Decisions⁴

One cautionary note: *never subordinate the mission in order to get money*. If there are opportunities that threaten the integrity of the organization, you must say no. Otherwise, you sell your soul. I sat in on a discussion at a museum that had been offered a donation of important art on conditions that no self-respecting museum could possibly accept. Yet a few board members said, "Let's take the donation. We can change the conditions down the road." "No, that's unconscionable!" others responded, and the board fought over the issue. They finally agreed they would lose too much by compromising basic principles to please a donor. The board forfeited some very nice pieces of sculpture, but core values had to come first.

Keep Thinking It Through

Keep the central question, What is our mission? in front of you throughout the self-assessment process. Step by step you will analyze challenges and opportunities, identify your customers, learn what they value, and define your results. When it is time to develop the plan, you will take all that you have learned and revisit the mission to affirm or change it.

As you begin, consider this wonderful sentence from a sermon of that great poet and religious philosopher of the seventeenth century, John Donne: "Never start with tomorrow to reach eternity. Eternity is not being reached by small steps." We start with the long range and then feed back and say, "What do we do *today*?" The ultimate test is not the beauty of the mission statement. The ultimate test is your performance.

Peter F. Drucker

Worksheet 1.1: What Is Our Current Mission? (Workshop)

a. Write or attach a copy of the organization's mission statement here.

b. What is our organization's reason for being? Why do we do what we do?

c. What, in the end, do we want to be remembered for?

The Five Most Important Questions Self-Assessment Tool, Participant Workbook, Third Edition. Copyright © 2010 by Leader to Leader Institute. Reproduced by permission of Jossey-Bass, an Imprint of Wiley.

Worksheet 1.1: What Is Our Current Mission? (Organizational)

a. Write or attach a copy of the organization's mission statement here.

b. What is our organization's reason for being? Why do we do what we do?

c. What, in the end, do we want to be remembered for?

Worksheet 1.2: Does Our Mission Need to Be Revisited? (Workshop)

- a. Rate the current mission using the following criteria and then decide if it should be revisited.

The Mission	Yes	To Some Extent	Not at All
Is short and focused—fits on a T-shirt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is clear and easily understood	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Defines purpose—why we do what we do, our reason for being	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does not prescribe means	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is sufficiently broad	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inspires our commitment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Says what, in the end, we want to be remembered for	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- b. Should the mission be revisited? Yes No

If so, what changes should we consider?

Worksheet 1.2: Does Our Mission Need to Be Revisited? (Organizational)

- a. Rate the current mission using the following criteria and then decide if it should be revisited.

The Mission	Yes	To Some Extent	Not at All
Is short and focused—fits on a T-shirt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is clear and easily understood	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Defines purpose—why we do what we do, our reason for being	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does not prescribe means	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is sufficiently broad	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inspires our commitment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Says what, in the end, we want to be remembered for	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- b. Should the mission be revisited? Yes No

If so, what changes should we consider?

Worksheet 1.3: What Are the Emerging Trends That Will Have the Greatest Impact? (Workshop)

- a. Identify emerging trends that will impact the organization. Describe the trend and note the data sources used to identify it (environmental scan, internal data, experience, and insight). Indicate if the trends will affect the organization in the short term, the long term, or both.*

Describe Trends

Note Data Sources

Changing demographics?

Short Term Long Term

Changing community conditions?

Short Term Long Term

Cultural or social trends?

Short Term Long Term

* *Short term* often is designated as one year; *long term* as three to five years.

The Five Most Important Questions Self-Assessment Tool, Participant Workbook, Third Edition. Copyright © 2010 by Leader to Leader Institute. Reproduced by permission of Jossey-Bass, an Imprint of Wiley.

Worksheet 1.3:

What Are the Emerging Trends That Will Have the Greatest Impact? (cont'd)

(Workshop)

Describe Trends

Note Data Sources

Economic trends; changes in the funding environment?

- Short Term Long Term

Politics, legislation, or regulation?

- Short Term Long Term

Media and communications?

- Short Term Long Term

* *Short term* often is designated as one year; *long term* as three to five years.

The Five Most Important Questions Self-Assessment Tool, Participant Workbook, Third Edition. Copyright © 2010 by Leader to Leader Institute. Reproduced by permission of Jossey-Bass, an Imprint of Wiley.

Worksheet 1.3:

What Are the Emerging Trends That Will Have the Greatest Impact? (cont'd)

(Workshop)

Describe Trends

Note Data Sources

New models, methods, and technologies?

Short Term Long Term

Competition?

Short Term Long Term

Other?

Short Term Long Term

* *Short term* often is designated as one year; *long term* as three to five years.

The Five Most Important Questions Self-Assessment Tool, Participant Workbook, Third Edition. Copyright © 2010 by Leader to Leader Institute. Reproduced by permission of Jossey-Bass, an Imprint of Wiley.

Worksheet 1.3: What Are the Emerging Trends That Will Have the Greatest Impact? (cont'd) (Workshop)

b. What are the three to five trends that will have the greatest impact on our organization?

1.

2.

3.

4.

5.

<http://www.pbookshop.com>

Worksheet 1.3: What Are the Emerging Trends That Will Have the Greatest Impact? (Organizational)

- a. Identify emerging trends that will impact the organization. Describe the trend and note the data sources used to identify it (environmental scan, internal data, experience, and insight). Indicate if the trends will affect the organization in the short term, the long term, or both.*

Describe Trends

Note Data Sources

Changing demographics?

Short Term Long Term

Changing community conditions?

Short Term Long Term

Cultural or social trends?

Short Term Long Term

* *Short term* often is designated as one year; *long term* as three to five years.

The Five Most Important Questions Self-Assessment Tool, Participant Workbook, Third Edition. Copyright © 2010 by Leader to Leader Institute. Reproduced by permission of Jossey-Bass, an Imprint of Wiley.

Worksheet 1.3:

What Are the Emerging Trends That Will Have the Greatest Impact? (cont'd)

(Organizational)

Describe Trends

Note Data Sources

Economic trends; changes in the funding environment?

- Short Term Long Term

Politics, legislation, or regulation?

- Short Term Long Term

Media and communications?

- Short Term Long Term

* *Short term* often is designated as one year; *long term* as three to five years.

The Five Most Important Questions Self-Assessment Tool, Participant Workbook, Third Edition. Copyright © 2010 by Leader to Leader Institute. Reproduced by permission of Jossey-Bass, an Imprint of Wiley.

Worksheet 1.3: What Are the Emerging Trends That Will Have the Greatest Impact? (cont'd) (Organizational)

Describe Trends

Note Data Sources

New models, methods, and technologies?

Short Term Long Term

Competition?

Short Term Long Term

Other?

Short Term Long Term

* *Short term* often is designated as one year; *long term* as three to five years.

The Five Most Important Questions Self-Assessment Tool, Participant Workbook, Third Edition. Copyright © 2010 by Leader to Leader Institute. Reproduced by permission of Jossey-Bass, an Imprint of Wiley.

Worksheet 1.3: What Are the Emerging Trends That Will Have the Greatest Impact? (cont'd) (Organizational)

b. What are the three to five trends that will have the greatest impact on our organization?

1.

2.

3.

4.

5.

<http://www.pbookshop.com>

Worksheet 1.4: What Are Our Opportunities? (Workshop)

- a. Refer to Worksheet 1.3, as well as other data sources (environmental scan, internal data, experience, and insight) to identify the organization's opportunities. Indicate if they are available in the short term, the long term, or both.*

1. What opportunities does the organization have to address compelling issues or conditions? Short Term Long Term

2. What opportunities does the organization have to fill a gap in its area of service? Short Term Long Term

3. What opportunities does the organization have to be a leader, to set a new standard of performance? Short Term Long Term

* *Short term* often is designated as one year; *long term* as three to five years.

The Five Most Important Questions Self-Assessment Tool, Participant Workbook, Third Edition. Copyright © 2010 by Leader to Leader Institute. Reproduced by permission of Jossey-Bass, an Imprint of Wiley.

Worksheet 1.4: What Are Our Opportunities? (cont'd) (Workshop)

4. What opportunities does the organization have to meet the interests of potential partners or funders?

Short Term
 Long Term

5. Other opportunities:

Short Term
 Long Term

* *Short term* often is designated as one year; *long term* as three to five years.

b. Which opportunities are the most promising for the organization? Why?

Worksheet 1.4: What Are Our Opportunities? (Organizational)

- a. Refer to Worksheet 1.3, as well as other data sources (environmental scan, internal data, experience, and insight) to identify the organization's opportunities. Indicate if they are available in the short term, the long term, or both.*

1. What opportunities does the organization have to address compelling issues or conditions? Short Term Long Term

2. What opportunities does the organization have to fill a gap in its area of service? Short Term Long Term

3. What opportunities does the organization have to be a leader, to set a new standard of performance? Short Term Long Term

* *Short term* often is designated as one year; *long term* as three to five years.

The Five Most Important Questions Self-Assessment Tool, Participant Workbook, Third Edition. Copyright © 2010 by Leader to Leader Institute. Reproduced by permission of Jossey-Bass, an Imprint of Wiley.

Worksheet 1.4: What Are Our Opportunities? (cont'd) (Organizational)

4. What opportunities does the organization have to meet the interests of potential partners or funders?

Short Term
 Long Term

5. Other opportunities:

Short Term
 Long Term

* *Short term* often is designated as one year; *long term* as three to five years.

b. Which opportunities are the most promising for the organization? Why?

<http://www.pbookshop.com>