**Identifying Mission, Vision, and Core Values**

Articulating the Foundation on Which the Plan is Built

**What Are Mission, Vision, and Core Values?** The mission, as defined by the Massachusetts Planning and Implementation Framework, is the district or school purpose, why the organization exists. The vision, on the other hand, is the district’s or school’s aspirations for students, what the community values and why, and what future success looks like. Core values are the principles that guide the decision making and action that will help achieve the vision; they reflect what the community believes in.

**Why This Step is Important:** Reviewing, revising, and/or creating each of these three plan elements is a critical step in the planning process. Together, these three elements form the foundation on which the plan, and the theory of action it embodies, is built. The theory of action, as defined by the Massachusetts Planning and Implementation Framework, is the beliefs and assumptions the district or school holds about why certain actions will lead to the vision the community seeks. The plan itself—with its strategic objectives, strategic initiatives, and outcomes—is this theory *in* action, and these foundational elements must be fully aligned with the plan in order to support district or school coherence, plan success, and ongoing effective communication.

While these three elements are foundational, the *Planning for Success* process does not begin with them and their creation. Unlike many other planning processes, *Planning for Success* actually engages the planning team in creating these elements near the end of the planning process. The PfS process instead begins with the community visioning and data analysis work that leads to the identification of the plan’s strategic objectives and initiatives. Once the planning team has developed a shared understanding of the community’s aspirations and what must be done to achieve future success through this work, team members generally find creating a mission and vision statement with aligned core values to be a simpler, more straightforward, and exciting experience than planning experiences they may have had previously.

**The Process for Identifying Mission, Vision, and Core Values:** The process for creating and/or revising the mission, vision, and core values of the district or school will vary depending on the particular planning process and planning team structure. The process below describes one possible approach to this work. This multi-step process is based on small group work that may be conducted simultaneously during one planning team meeting, with subsequent, iterative opportunities to further refine and revise if desired.

1. *Identify the mission:* The mission is the purpose, why the organization exists. As with all other elements of the plan, a mission statement is most useful in helping to focus and sustain an organization when it is framed in simple, accessible language that all members of the community can easily understand, remember, and communicate. Creating a mission statement of 1-3 sentences or a tag line, for example, will help achieve this result.

Planning teams will want to review any existing mission statement in light of the plan’s recently developed strategic objectives and initiatives and create a mission statement that accurately reflects the purpose of the district or school as the planning team now understands that purpose. Planning teams may also find it reassuring if, upon review, they decide that the existing mission statement remains accurate and should be left in effect, unchanged.

1. *Identify the vision:* The vision is the district’s or school’s aspirations for students, what the community values and why, and what future success looks like. As with all other elements of the plan, a vision statement is most useful in helping to inspire, focus, and sustain an organization when it is framed in simple, accessible, and inspirational language that all members of the community can easily understand, remember, and communicate. Creating a vision statement of 1-3 sentences, for example, will help achieve this result.

Planning teams will want to review any existing vision statement in light of the plan’s recently developed strategic objectives and initiatives and create a vision statement that accurately reflects the district’s or school’s aspirations for students as demonstrated by the plan. While continuity with an existing vision statement may be possible, planning teams generally find it most appropriate and useful to create a new vision statement that mirrors the new plan and conveys the community’s spirit of enthusiasm and optimism for achieving it.

1. *Identify core values:* Core values reflect what the community believes in and guide the decision making and action that will help achieve the vision. As with all other elements of the plan, core values are most useful in helping to focus and sustain an organization when they are framed in simple, accessible language that all members of the community can easily understand, remember, and communicate. Prioritizing core values and creating a list that is more manageable and succinct will help achieve this result.

Planning teams will want to review any existing core values in light of the plan’s recently developed strategic objectives and initiatives, and identify core values that are inherent in, and required to achieve, the new plan. As with the mission, planning teams may also find it reassuring if, upon review, they decide that some or all of the existing core values are appropriate and should remain in effect, unchanged.

**Note to Facilitators:** While the use and choice of language is a very important consideration throughout the development of the plan, it is particularly important in the drafting and refining of these foundational elements, which often stand alone in district or school communications. Since “wordsmithing” is involved to a greater degree in the creation of these elements, it is helpful to organize the planning team in small groups of 4-6 participants each in order to conduct this work. In addition, since planning team members bring their own skills and preferences to such work, it is helpful to let members select the group and element they would like to work on: mission, vision, or core values.

There are, of course, many ways to structure this work. With the approach described in this resource, the facilitator begins by reviewing all three elements with the planning team as a whole, defining them and sharing and discussing examples of each. The *Planning for Success* website offers a number of examples of district plans that facilitators may review and choose from as they share examples of each of these elements with their teams. The facilitator then organizes the planning team into three small groups—one for mission, one for vision, one for core values—and allows team members to select the group and element they prefer to work on. The facilitator should ensure that each group has a copy of any existing version of its assigned element. For example, the mission group should have a copy of the existing mission statement, and so on.

**Time Required**: A session organized as described, with multiple small groups working simultaneously to create first drafts of the mission, vision, and core values, requires approximately 1.5-2 hours to complete, depending on the pace at which each small group works and the total number of small groups that will report out.

**Text for Facilitator Presentation Slides:** Some suggested text for presentation slides for identifying mission, vision, and core values is included below.

**Slide 1: Mission**

* A mission statement represents our purpose; why the district or school exists
* Consider the purpose of [district or school name]
* Draft 1-3 sentences that simply and succinctly state that purpose

*[Insert slides with examples of mission statements from PfS plan examples]*

**Slide 2: Vision**

* A vision statement represents our aspirations for students: what we value and why, and what future success looks like
* Consider the vision identified by your community and articulated by the strategic objectives and strategic initiatives of the plan
* Draft 3-5 sentences that reflect the future vision

*[Insert slides with examples of vision statements from PfS plan examples]*

**Slide 3: Core Values**

* Core values are what we believe in: the principles that guide decision-making and action
* Consider the core values inherent in, and required to achieve, the strategic objectives and strategic initiatives of the emerging plan
* Draft 4-6 core values that can be easily remembered and communicated

*[Insert slides with examples of core values from PfS plan examples]*

**Slide 4: Group Presentations**