

Definitions

Vision:

- What you see for tomorrow; always anchored in our organization's needs and values
- It tells us where we are going, it is our overall sense of direction, the desired destination
- A description of what an organization would like to achieve in the mid to long term future and guides the course of action the organization will take
- A vision statement is a quick summary of that direction, written in future tense (i.e. "We will...reach these results")
- A descriptor of what we will become
- It is NOT a description of the strategies to be used
- Visions are shared with important stakeholders. Often, visions are created and developed by a group of stakeholders or members rather than by an individual. The essence of a shared vision answers these questions:
 1. What do we want to create with this organization?
 2. Describe what the organization would have to look like to meet the requirements stated above.
 3. List the characteristics that need to be in place to achieve the organizational design that you have described.
 4. Identify the things you need to do within the organization to achieve the characteristics you have identified.

Mission:

- What your organization must do to get to the vision (reaching the dream, getting results)
- A mission is something to be accomplished whereas a vision is something to be pursued
- The mission statement is usually written in present tense to tell others what the organization does today and who it serves, including important core beliefs as it supports the vision for the future
- When presenting a mission, try answering these questions:
 1. What does your organization actually do - i.e. what is its function, what need does it fulfill?
 2. For whom does your organization perform that function i.e. who are the stakeholders in your efforts to fulfill that function? Think about your members, your community, other associates, your social responsibilities.
 3. How does your organization perform that function in a way that sets you apart? What are your fundamental guiding principles?

Purpose, Core Beliefs and Values:

Purpose

- Defines why we as a community or org exist and why we are engaged in creating a future. Gives meaning to existence – It answers these questions:
 1. What is the purpose of this organization?
 2. Why do we exist?

Note: Organizations can create both a purpose statement and a values statement. However, many organizations will incorporate their purpose within their vision statement or vision description.

Values

- The beliefs, principles and guiding factors that we hold in common as a community or organization – it answers these questions:
 1. What are the values that underlie our purpose as a community or organization?
 2. What are the critical values that our members share?
 3. What are the values that a person affiliated with this organization is expected to accept?

Core Beliefs

- Values rest on beliefs and the outcome is a set of principles; they are manifested by living out the vision (how we are expected to act, a certain level of standard, basic beliefs from which our members make decisions for the organization)
- Our beliefs, our “Philosophy of how we conduct business and/or serve community”
- While there are always organizational needs that fluctuate and change with the times (our strategies), an organization’s core values are more of a constant. There should be a pretty consistent consensus on values/core beliefs and these do not necessarily change with the times.

Note: Organizations can create a values statement as well as list core beliefs. Some organizations will combine the two into one description, summary or list of bullet points. Core beliefs and values are usually summarized within a mission.

Strategic Goals and Objectives:

By creating and developing a shared vision, an organization will begin to notice some trends and themes. From these themes, a group can identify their organization’s long range (and usually very large) goals. From these large goals, a group will break them down into more realistic objectives: smaller plans accompanied by who is responsible for each piece of the plan along with a general timetable that sounds realistic. And as the group progresses further into more detail, more tactical action steps can be developed. These tactical steps are accompanied by very specific time lines,

identification of who will take on which task, and establishing milestones for measuring what is completed.

Taglines or Slogans:

- Crafted for branding reasons
- A tagline communicates your attributes
- It is the briefest, easiest way to communicate your brand
- It is designed around an organization's vision strategy, creatively communicated, and delivered passionately
- A simple and catchy phrase that encapsulates a product's appeal or the mission of an organization and makes it more memorable.
- It is used over a long period of time and becomes an important part of the organization's image
- It dominates all documents, marketing material, PR literature, and online communications. It is as important as a logo.
- It is getting out to the public in just a few words:
 1. Who is the organization?
 2. How is it different from other organizations?
 3. Why should your base audience or other audiences care?

Elevator Speech:

- Is used to "sell" your services to others...usually verbal and to the point.
- It is your "pitch" to those who do not recognize your organization or understand what your organization does
- It is an overview of an idea for a product, service or project
- Think of this as a speech that is given or explained to a stranger within a short amount of time... as if you were in an elevator with someone you do not know very well and only have enough time as it takes for you to go from the first to the 5th floor.
- Your tagline can sometimes be used as your lead in to your elevator speech. The speech must answer a stranger's question:
 1. "So what is your organization?" or
 2. "Why would this organization be important to me?"

Think of getting started in this way: A stranger asks you what your Rotary pin is all about. You are just punching the elevator button in the lobby to go to the 5th floor. Your answer is, "It's a service club" and the stranger states, "so what..." Then what would you say for the next 30 seconds to summarize Rotary and get this individual interested and wanting to ask more questions?