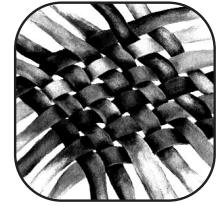


## MODULE 9: MISSION AND ORGANIZATIONAL VALUES



**Step One:** Creating Your Inlusiveness Committee

**Step Two:** Training and Consultants

**Step Three:** Definitions and Case Statement

**Step Four:** Gathering and Analyzing Information

**Step Five:** Creating Your Inlusiveness Blueprint

**Step Six:** Implementation



## MODULE 9: MISSION AND ORGANIZATIONAL VALUES

### Overview of Content

In this module, you will:

- Review information about inclusiveness in relation to mission and organizational values.
- Analyze the data from the information-gathering process that pertain to mission and organizational values.
- Review a series of concrete suggestions for developing more inclusive mission and organizational values statements.
- Make recommendations about whether or not changes need to be made in relation to the mission and values.
- Establish goals and objectives for your work on mission and values statements that will be integrated into your inclusiveness blueprint.

Note that in most cases, you will not actually revise the mission or values statements; rather, you will gather and analyze important information about mission and values and make a recommendation (most likely to the board of directors and CEO) about the need for changes to the mission and values statements and a process for making those changes.

This module should be completed by any organization that has decided to look at its **mission and organizational values** in relation to inclusiveness. If you haven't prioritized **mission and organizational values** as a part of your inclusiveness initiative, then skip to *Module 10: Board of Directors*.

### *Who to Involve*

The work in this module should be completed by the Inclusiveness Committee as a whole.

### *Exercises to Complete*

- *Exercise 9-A: Current Mission and Values Statements*
- *Exercise 9-B: Benefits of Inclusive Mission and Values Statements*
- *Exercise 9-C: Analyzing Information*
- *Exercise 9-D: Deciding What to Include in the Blueprint*
- *Exercise 9-E: Developing an Action Plan: Goals and Objectives*
- *End-of-Module Checklist*

**Step Five:** Creating Your  
Inclusiveness  
Blueprint

## MODULE 9: MISSION AND ORGANIZATIONAL VALUES



### Organizational Mission Statements

The purpose of a nonprofit mission statement is to make clear an organization's core purpose, the general methods it uses to achieve its overall goals, and the primary community that it serves.

Many inclusive organizations strive to address their commitment to inclusiveness in their mission statements as well as through other mechanisms such as an inclusiveness statement. However, some organizations find that inclusiveness is best addressed through means other than a mission statement.

**For example**, the mission of a fictional animal welfare organization is to “provide shelter and care for animals in need.” In this case, because the mission is narrowly defined to focus on animal welfare, it might not be appropriate to address issues of inclusiveness within the organization's mission.

Depending in part on the outcomes from your information gathering, in *Exercise 9-C: Deciding What to Include in the Blueprint*, you will have the opportunity to consider whether or not your organization needs a mission statement change to fully address issues of inclusiveness.

Here are some examples of mission statements that have been designed to include a commitment to inclusiveness:

- 1. The Chinook Fund:** The Chinook Fund is committed to the transformation of society into one that promotes social justice and freedom from oppression, including but not limited to, racism, sexism, classism, heterosexism, ageism, and ableism.<sup>1</sup>
- 2. National Committee for Responsive Philanthropy:** NCRP is an independent nonprofit that works to strengthen the nonprofit sector and improve its ability to represent and serve individuals politically, economically, or socially disadvantaged, by promoting greater philanthropic openness and accountability.<sup>2</sup>
- 3. Denver School of Science and Technology:** The Denver School of Science and Technology is dedicated to providing a diverse student body with an outstanding liberal arts high school education with a science and technology focus. By creating a powerful learning community centered on core values and a shared commitment to academic excellence, DSST will increase the number of underrepresented students (women, minorities and economically disadvantaged) who attain college science and liberal arts degrees. DSST graduates will be responsible, engaged citizens who are prepared to be leaders of the future.<sup>3</sup>



*“Each time a man stands up for an ideal, or acts to improve the lot of others, or strikes out against injustice, he sends forth a tiny ripple of hope...those ripples build a current that can sweep down the mightiest walls of oppression and resistance.”*

*-Robert F. Kennedy*

## Organizational Values Statements

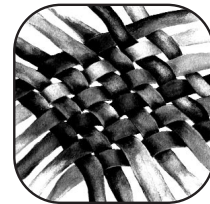
Values statements spell out the core principles that guide an organization’s work. Whether or not they are officially stated, an organization’s values are an important part of the organization’s culture. Values statements help define the principles and ethics by which an organization operates and can act as a guide. They help define what is right and wrong as well as the behaviors and perspectives that are valued within the organization. They are often called upon to help resolve conflicts or to negotiate ethical dilemmas. Community members also can look to these statements to find out more about an organization. Not all organizations have values statements, but all organizations have values.

If your organization does not have or does not want to have a values statement at this time, then only complete the portions of this module that relate to mission statements.

However, if your organization does have a values statement, then it is probably worthwhile to re-examine it as a part of your inclusiveness initiative. Likewise, if your organization does not currently have a values statement but would like to develop one, continue with the exercises in this workbook regarding values.

Many organizational values include a statement of commitment to diversity or inclusiveness. An obvious statement would be “We value diversity.” Without a further description of what “valuing diversity” means, it may be hard for people to link this statement with their work. Because inclusiveness is about treating people with respect, and because good management and leadership practices are related to successful inclusiveness practices, oftentimes values statements that do not directly relate to inclusiveness can be useful in creating a more inclusive organizational culture. For instance, such values as “We will treat each other fairly” and “We will value the opinions of others” don’t directly mention inclusiveness, but they can promote the development of an inclusive organization.

Of course, just because an organization says it has a certain set of values does not mean that those values are a part of the day-to-day practices of the organization. However, even values that your organization aspires to are worthy because they can provide people with opportunities to raise concerns about how an organization says it wants to behave and how it actually behaves. This conflict between aspirations and reality can be especially common with values relating to inclusiveness. So long as there is buy-in at all levels when the values statement is created, statements about inclusiveness are worth including because they will help create internal understanding about the desired shift within the organizational culture.



Here are some examples of components of values statements from nonprofit organizations that relate directly or indirectly to inclusiveness or diversity:

1. Commitment to equitable treatment and elimination of discrimination in all its forms at all organizational levels and throughout all programs.<sup>4</sup>
2. Commitment to diversity in all staff, volunteers, and audiences, including full participation in programs, policy formulation, and decision-making.<sup>5</sup>
3. Recognition of the rights of all individuals to mutual respect; acceptance of others without biases based on differences of any kind.<sup>6</sup>
4. Ability to lead and model diversity throughout the organization and to lead society toward pluralism.<sup>7</sup>
5. Commitment to individual and organizational efforts to build respect, dignity, fairness, caring, equality, and self-esteem.<sup>8</sup>
6. Diversity – Embrace cross-cultural diversity – Adaptable, anti-racist, embracing cultural differences, open to new experiences.<sup>9</sup>
7. Respect and value diverse life challenges, creating an environment that is inclusive of all.<sup>10</sup>
8. Welcome and respect the diversity of our patients, employees, and physicians.<sup>11</sup>
9. We acknowledge and honor the fundamental value and dignity of all individuals. We pledge ourselves to creating and maintaining an environment that respects diverse traditions, heritages, and experiences.<sup>12</sup>

These statements represent only a small sample of the many possible ways that values statements can embody an organization's commitment to inclusiveness.

*Complete Exercises 9-A: Current Mission and Values Statements, 9-B: Benefits of Inclusive Mission and Values Statements, 9-C: Analyzing Information, 9-D: Deciding What to Include in the Blueprint, and 9-E: Developing an Action Plan for Mission and Organizational Values.*

**Track your progress in completing Module 9 on the *End-of-Module Checklist*, located after the exercises.**

<sup>1</sup> The Chinook Fund, [www.chinookfund.org](http://www.chinookfund.org)

<sup>2</sup> The National Committee for Responsive Philanthropy, [www.ncrp.org](http://www.ncrp.org)

<sup>3</sup> The Denver School of Science and Technology, [www.scienceandtech.org](http://www.scienceandtech.org)

<sup>4</sup> Cornell University Cooperative Extensions University, <http://www.cce.cornell.edu/programs/diversity/values.htm>

<sup>5</sup> Cornell University, *Ibid.*

<sup>6</sup> Cornell University, *Ibid.*

<sup>7</sup> Cornell University, *Ibid.*

<sup>8</sup> Cornell University, *Ibid.*

<sup>9</sup> Mennonite Mission, <http://mennonitemission.net/personnel/openings/workers/international/values.asp>

<sup>10</sup> The Denver Foundation, [www.denverfoundation.org](http://www.denverfoundation.org)

<sup>11</sup> Rose Medical Center, <http://www.rosemed.com/CustomPage.asp?guidCustomContentID=%7B41FF95B1-DF59-11D3-AD19-00509B91A0DD%7D>

<sup>12</sup> Daniels Fund, [www.danielsfund.org](http://www.danielsfund.org)

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## EXERCISE 9-A

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### Current Mission and Values Statements

Write your current mission statement below:

Write your current values statement below, if applicable:

*Date Exercise Completed* \_\_\_\_\_



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## EXERCISE 9-B

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### Benefits of Inclusive Mission and Values Statements

**Instructions:** Write down the benefits that your organization will realize with more inclusive mission and values statements.

- Before you begin, revisit Module 4: Making the Case for Inclusiveness, Exercise 4-B: Visualizing Greater Inclusiveness for a reminder of some of your initial reflections on this matter.
- In addition to the points discussed in the module, think about benefits that might be specific to your particular organization.

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**Date Exercise Completed** \_\_\_\_\_





## EXERCISE 9-C

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### Analyzing Information

***Instructions:***

*Refer to Module 7: Information Gathering, Part 3: Compiling Results*

- *Exercise 7-C: Available Facts: Compiling Other Information*
- *Exercise 7-G: Stakeholder Perspectives: Compiling Likert Scale Responses*
- *Exercise 7-H: Stakeholder Perspectives: Compiling Narrative Responses*

*Select and review the information that pertains to mission and organizational values.*

*Answer the questions below.*

#### Available Facts

In what ways are your organization's mission and values statements more inclusive than other organizations in your field?

In what ways are your organization's mission and values statements less inclusive than other organizations in your field?

continued

**EXERCISE 9-C: Analyzing Information *continued***

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What best practices from the field regarding mission and values are applicable to this particular category?

Did you notice anything else regarding your mission and values statements from the results of the existing data scan?

Stakeholder Perspectives

What salient themes regarding your organization's mission and values statements were identified by a majority of your stakeholders?

continued

**EXERCISE 9-C: Analyzing Information *continued***

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What stories or strongly held beliefs regarding your organization's mission and values statements were identified by stakeholders?

Are there any significant inconsistencies in perspectives among groups of stakeholders regarding your organization's mission and values statements?

What trends can you identify regarding your organization's mission and values statements based on the perspectives of your stakeholders?

continued

**EXERCISE 9-C: Analyzing Information *continued***

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Did you notice anything else regarding the stakeholder perspectives in this category?

Is there any additional information regarding mission and values statements that currently isn't available that you would like to collect in the future?

yes  no

If YES, what additional information would be helpful?

**Date Exercise Completed** \_\_\_\_\_

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## EXERCISE 9-D

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### Deciding What to Include in the Blueprint

***Instructions:***

*Answer the following questions:*

Should your organization's mission statement be revised to better reflect the organization's commitment to inclusiveness?

yes    no

If YES, summarize the reasons that you recommend revising the mission statement (based on observations from the assessments):

If YES, write some initial thoughts on how it could be revised:

continued

**EXERCISE 9-D: Deciding What to Include in the Inclusiveness Blueprint *continued***

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Should your organization's values statement be revised – or should a values statement be created – to better reflect the organization's commitment to inclusiveness?

yes no

If YES, summarize the reasons (based on observations from the assessments) that you recommend revising the mission statement:

If YES, write some initial thoughts on how it could be revised:

continued

**EXERCISE 9-D: Deciding What to Include in the Inclusiveness Blueprint *continued***

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***Instructions:***

- *Determine who will be responsible for reviewing/creating your vision and values statements utilizing an inclusiveness lens.*
- *In most organizations, the board of directors is responsible for creating and reviewing a mission statement so it is generally advisable for members of the board to lead the process or to be deeply involved with the process.*
- *Clarify who will be responsible for approving the mission and values statements below.*

Party responsible for reviewing/creating mission and values statements:

Party responsible for approving mission and values statements:

***Date Exercise Completed*** \_\_\_\_\_





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## EXERCISE 9-E

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### Developing an Action Plan for Mission and Organizational Values

***Instructions:***

*Using the following template, record the problem statement and goals, as well as the steps that you will take to accomplish your goals, in relation to inclusiveness and your mission and values. Remember that every organization usually has its own way of defining goals and objectives. The outline below can be tailored to match your organization's usual planning process.*

(1) What is the primary problem you want to address by revising/creating mission and/or values statements?

(2) What is/are your desired goal(s)?

continued

**EXERCISE 9-E: Developing an Action Plan for Mission and Organizational Values *continued***

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(3) For each goal, what is/are your desired outcome(s)?

(4) For each goal, what are the primary objectives you hope to accomplish?

(5) For each objective, what tasks will you complete to accomplish the objective?

(6) Who will be responsible for completing each task?

continued

**EXERCISE 9-E: Developing an Action Plan for Mission and Organizational Values *continued***

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(7) When will the objectives and tasks be completed?

(8) What resources, financial and otherwise, are necessary for achieving each goal?

**Date Exercise Completed** \_\_\_\_\_



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## END-OF-MODULE CHECKLIST

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### Module 9

<i>Action Item</i>	<i>Date Completed</i>	<i>Notes</i>
Review current mission statement.		
Review current values statement, if organization has one. (Note: If your organization does not have a values statement, consider creating one.)		
Analyze information gathered about mission and values statements.		
Develop an action plan to accomplish goals and objectives.		
Recognize your progress to date and communicate it to appropriate stakeholders.		