Mission Possible: IMPROVING YOUR ORGANIZATION'S MISSION STATEMENT

QUESTION: *How do you know if your organization's mission statement needs work?* ANSWERS: *If it's more than one paragraph. If when you describe your organization, it doesn't match your printed statement. If it's dull and boring and the readers roll their eyes. If the reader doesn't understand a word of what he just read. If you find that staff are using different mission statements for their own department's purposes. If your organization has succeeded in achieving its mission.*

Paul Connolly and Laura Colin Klein, consultants with The Conservation Company, led a packed house through an informative and entertaining workshop on mission statements. The session included reviewing several participants' mission statements along with an opportunity for people to analyze their own organization's statement.

A mission statement is important to an organization's various constituencies for the following reasons: It gives management a framework to decide what the scope of services should be and helps determine the population that will be served. It guides board members in overseeing the organization's work and in determining how to pursue external opportunities and address challenges. It sets the tone for strategic planning by staff and board members and helps an organization set limits on its different programmatic options. It is a motivator for staff and should give them a reference point for their own efforts in serving clients. A clear and inspirational mission statement can help recruit volunteers and is important in raising funds from donors.

In most instances, a mission statement is not a formal legal document. A mission statement should be distinguished from the purposes clause in the organization's certificate of incorporation and the statement of activities and purposes that appear in the organization's application for tax exemption from the IRS. If an organization changes its mission statement it is not required to inform any authority of the change. (See sidebar)

There are several schools of thought on what a mission statement should and should not be. Some experts feel that a mission statement should not prescribe means while others think that it should; some believe that a statement should be extremely brief, and others don't.

At its core, a mission statement explains why an organization exists. It should contain two basic elements: an infinitive verb that indicates a change in status (for example, increase, decrease, eradicate, prevent, etc.); and an identification of a problem to be addressed or a condition to be changed (for example, access to cultural resources, the existence of a disease, etc.).

A mission statement should be short and focussed, but, it should also be broad and overarching enough to encompass organizational purposes for many years. A good mission statement addresses opportunities; inspires commitment; is positive, exciting and inspirational; is valid and fits with the abilities of the organization; and keeps the organization focussed. Finally, a good mission statement tells what the organization wants to be remembered for.

Ideally, a mission statement should be at the beginning in the hierarchy of statements (whether it is a grant proposal, a client report, or a long-range plan). The other statements that some people confuse with a mission statement include: A *vision statement* describes the organization's desired future, often expressed in terms of the organization's impact and image. A *values statement* describes the principles that guide the organization's work and includes a description of an organization's philosophy and beliefs and often explains the organization's relationship to its environment or resources. *Goals and objectives* are outcome statements that define what an organization is trying to accomplish with its programs and operations. (Goals tend to be long-range and objectives are short-term). *Strategies* are broad priorities and directions adopted by an organization in order to meet its goals and objectives. *Tactics* are specific action steps to accomplish strategies, including financial and budget plans, schedules, and identification of who is responsible for specific activities.

While a good mission statement must focus on the organization's purpose, it may also describe an organization's vision for society and its intentions for achieving its desired ends. Although a mission statement is different from a vision statement and a value statement, some organizations combine parts of them into one statement. If an organization finds that its mission statement is too long and unwieldy, Klein suggested breaking it down into the

statements outlined above.

Klein recommended reviewing a mission statement every three years or more frequently if the group is operating in a field that is undergoing tremendous change. The following is a suggested way to go about that task.

• Establish a small writing group that includes representatives from staff, board, clients and funders. (Do not try to draft a mission statement in too large of a group.) Begin by brainstorming for key words that should appear in the statement. Next, ask each individual to write his own draft mission statement. Using these drafts, the writing group will then create one statement based on the common themes found in the individual drafts. In creating the group draft, the following are some of the questions and considerations that should be addressed: Will your target audience understand the jargon? Will the general public understand the message? Is the statement too long (and does it need to be broken down into values, goals, objectives, etc.)? Are your verbs strong or weak? Do verbs like "empower" or "promote" sound hollow or hackneyed and might you want to define them further? Connolly noted that there are natural trade-offs in the qualities of a good mission statement, and that a statement probably can't be everything. Finally, after working on the statement and trimming it down (you probably will come up with too much verbiage), you may need to put back some of the "inspiring and fluffy" language.

• The writing group should get input and suggestions from the organization's stakeholders and incorporate them into the statement. So that no individual feels slighted, review all of the drafts and entertain all suggestions.

• The new or revised mission statement is presented to the full board for approval. One should probably expect some discussion and possible modification of the statement by board members.

• The new mission statement is adopted, widely circulated and used. Incorporate the new mission statement into all aspects of organizational life, including proposals, training materials, bulletin boards, brochures, and stationery.

These four steps are critical in order to end up with a well thought out mission statement that will be accepted and used by all of the stakeholders. The result should be a mission statement that everyone is able to clearly communicate.

Connolly noted that people tend to be afraid of creating and revising their organization's mission statement. He likened the process to the Cheshire Cat from *Alice in Wonderland*, who when asked for directions replied that it depends on which way you want to go. There is a basic formula that all mission statements should follow, however, a mission statement should reflect the culture and individuality of the organization and its leaders.

The Conservation Company provides management consulting and planning services to nonprofits. They can be reached at 212/949-0990 or visit their web site at www.consco.com

In most instances a mission statement is not a formal legal document. It is rather a statement of purpose developed by an organization to help it keep true to its mission and has only hortatory significance. A mission statement should be distinguished from the purposes clause in an organization's certificate of incorporation and the statement of activities and purposes that appear in the organization's application for tax exemption from the IRS.

If an organization changes its purposes in a way that enlarges, limits or otherwise changes its corporate purposes asset out in its certificate of incorporation, it must amend its certificate. In drafting the purposes clause of a nonprofit's certificate of incorporation it is necessary to provide a fairly specific description of the ways in which the corporation will carry out its purposes while at the same time avoiding being overly narrow so as to unduly restrict the activities in which the corporation can engage. If the corporation changes its purposes in a way that materially deviates from its purposes clause, it must amend its certificate.

When you apply for your tax exemption, you must provide a narrative description of your activities. If you are successful, the determination letter from the IRS, in addition to letting you know that you are exempt, will advise you (to the effect) that if your purposes, character or method of operations change, you must notify the IRS of the changes so it can consider the effect of the changes on your exempt status. You apply for you exemption by filling out and submitting Form 1023 (Application for Recognition of Exemption under Section 501(c)(3) of the Internal Revenue Code). Part III of Form 1023 asks the applicant to provide a detailed description of all its activities. It instructs the applicant to not "merely refer to or repeat the language in its organizational document." And it requires that the description of each activity "include, as a minimum, the following: (a) a detailed description of the activity including its purpose (b) when the activity was or will be initiated; and (c) where and by whom the activity will be conducted." Thus, if you materially change you activities from the way you described then in your Form 1023, you must notify the IRS of the change.

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