Vision–Mission–Values Exercise Worksheet

# I. Introduction

This worksheet is designed to help leadership teams clarify their organizational identity by defining a compelling vision, an actionable mission, and a set of guiding values. It strengthens team alignment and improves communication with stakeholders. This resource is ideal for strategic planning retreats, team workshops, or board development sessions.

You may complete the sections in one sitting or spread them across several facilitated discussions. Use the exercises and prompts below to guide your team through reflection and articulation of your organization’s purpose and direction.

# II. Defining Vision

A vision statement is a future-oriented declaration that describes the desired long-term impact of your organization. It should be inspirational, clear, and aligned with your purpose.

**Reflection Questions:**

* What lasting change do we hope to see in the world or our community?
* If we were completely successful, what would the world look like?

**Activity:** Draft 1–2 possible vision statements below.

Draft Vision Statement 1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Draft Vision Statement 2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Refined Vision Statement: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# III. Clarifying Mission

A mission statement explains what your organization does, who it serves, and how it achieves impact. It should be concise, concrete, and action-driven.

**Reflection Questions:**

* Who do we serve?
* What do we do?
* How do we do it effectively or uniquely?

Activity: Use the template below to draft a mission statement.

We exist to [do what] for [whom] by [how].

Draft Mission Statement: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# IV. Identifying Core Values

Organizational values are the guiding principles that inform behavior, decisions, and the overall culture of the workplace. Values should be both aspirational and observable in day-to-day operations.

**Reflection Questions:**

* What values have shaped our decisions and culture so far?
* What values do we want future staff and partners to uphold?
* How do we define each value in action?

**Activity:** List 5–7 values below and describe what each value looks like in practice.

Value 1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Value 2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Value 3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Value 4: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Value 5: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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# V. Alignment Check

Evaluate whether your current strategies, programs, and team behaviors reflect the mission, vision, and values you identified.

**Internal Alignment Questions:**

* Are our activities consistent with our stated mission?
* Do staff understand and embody our values?

**External Alignment Questions:**

* Do partners and funders understand our vision?
* Are our communications aligned with our identity?

**Activity:** Use the table below to check alignment.

Program/Activity | Aligned with Vision/Mission/Values (Yes/No) | Notes

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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# VI. Finalization & Implementation

**Next Steps:**

* Assign someone to finalize the statements.
* Share with staff and stakeholders.
* Embed into onboarding, marketing, and strategy documents.

Team Commitment:

One way I will embody our mission and values: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_