1. Mission & Vision Statement Builder

This walks through developing (or fine-tuning) mission and vision statements. Remember, mission is important for any venture, whatever you call it. So, regardless of what type of business you're starting (charitable or not) you'll want to really think through mission before you start.

First, the Mission...

Step 1. Break Down the Mission

What do you do? _____

Who do you do it for? _____

Why do you do it? _____

For how long do you plan to do it? _____

Where do you it? _____

How do you do it? _____

Big picture, what are you trying to accomplish? _____

Step 2. Things to keep in mind

- The tone should fit you and your personality. If you're quirky, add a little quirkiness.
- The language should be something your demographic understands and immediately resonates with.
- Your mission statement should exceed 350-400 characters. If it starts to get long, pan out for a bigger picture and write from there.
- Don't mistaken the mission statement for the vision statement. The vision statement focuses more on dreams and steps.
- Is the mission statement something the board and staff can easily memorize?

- Don't forget to mention you're a charity or 501(c)(3) if you want the marketing brownie points.
- You may not have too many cooks draft, but absolutely pass this around for feedback.
- Leave a little breathing room for growth or slight change.

Step 3. Now let's try to build a mission statement from the answers and thoughts above...

EXAMPLE 1. [ORGANIZATION'S NAME] provides/does [INSERT YOUR WHAT OR WHAT'S IF MORE THAN ONE] for [INSERT YOUR WHO]. We do this by [INSERT YOUR HOW OR HOW'S IF MORE THAN ONE].

EXAMPLE 2. [ORGANIZATION'S NAME] seeks to [INSERT BIG PICTURE] for [INSERT YOUR WHO] by [INSERT YOUR HOW OR HOW'S IF THERE ARE MORE THAN ONE]. [CAN ALSO INSERT YOUR WHEN, SUCH AS "WITHIN OUR LIFETIME."]

EXAMPLE 3. [ORGANIZATION'S NAME] is a [INSERT WHAT YOU ARE] that [INSERT WHAT YOU DO].

Now, the Vision...

Step 1. Break Down the Vision

What are important milestones? _____

What are your dreams? Ideals? _____

How will we know you were successful? _____

What are all the ways you're going to accomplish these milestones or dreams? What are the action steps? _____

Where's the urgency? Is there a deadline? Goal number? Something to put skin in the game? _____

Step 2. Things to Keep in Mind

- Here's your chance to flesh out the mission statement. What are the gaps the vision statement can fill in?
  - Defining terms. Things like "homeless," "hungry," or "poverty."
  - Outcomes. Can you go into a little more detail about the outcomes you anticipate?
  - Opportunities. Is there room to talk about the types of partnerships and resources you'll continuously need? Or ways people can get involved?
  - Differentiators. A bit unorthodox, but can you slide in how your plan, solution, services, approach, background, etc. is different? Why does the reader have any reason to believe you'll have impact?
- Paint the picture here. How are things currently, and how are you going to solve the problem?
  - There should be a really clear picture of what the world will look like once the problem is solved.
  - Is it clear what type of impact you anticipate having? If not, be explicit.
- Again, drive home why all of this matters to *me*, the reader? Why should I care or pay attention?

Step 3. Now let's try to build a vision statement from the thoughts and breakdown above...

The vision has so many different varieties, I don't want to short change you with examples. Play with the things I mention in Step 2, mixing and matching to see what fits you best. Here's a springboard example to get you started.

EXAMPLE 1. [ORGANIZATION'S NAME] sees a world where [INSERT VISION] and plans to accomplish this by [INSERT SPECIFIC ACTION PLAN AND/OR GOAL LINE]. We'll do this by:
- *[INSERT ACTION]*
- *[INSERT ACTION]*
- *[INSERT ACTION]*
- *[INSERT ACTION]*
- *[INSERT ACTION]*

2. Spectator Document

This walks through high level steps and hurdles you should be thinking about as you start your charitable or non-charitable business. It doesn't include everything, and steps will change depending on where you are. But it does get your brain going.

Business Logistics.

Licenses and Permits

What types of licenses and permits will you require? Think through a day of operations, do you plan to involve any of the following? If so, fill in what permits are required for each.

Cooking or selling food:

A brick and mortar facility:

Working with the elderly:

Working with children:

State Formation Steps

What does the state require to start your organization? Do they require any of the following? If so, fill in yes or no for each. If there's a yes, fill in what's required.

A registration filing?

Giving notice to an agency?

Filing a separate registration if a charity?

Periodic or annual filings each year?

Submit tax filings each year?

Tax Filings

Fill in what has to be filed for each entity, and when it's due. Put these dates in a calendar somewhere.

State   Due:

Municipal   Due:

Federal   Due:

Other Taxes   Due:

The Landscape

Potential Funders

Who are the potential funders in your space? Keep in mind, there doesn't have to be a direct correlation, your services may tie in with a bigger mission. For example, a funder focusing on housing may see the correlations financial literacy or health have with asset-building and be open to funding these causes.

Foundations:

Investors:

Incubators:

Individuals:

Institutions:

Potential Partners

Who are the potential partners? Who can you partner with on events, resources, community building or even your mission itself? Don't be afraid to partner with people in a similar space, or who you may perceive as competitors. There may be gaps you can fill for them, or them for you. And this may be a great way to amplify a message or need.

Event Partners:

Service Partners:

Mission Partners:

Resource Partners:

Community Leaders:

Thought-Leaders:

Academics:

Similar Ventures

Don't move a muscle until you've done a landscape scan and seen who else is out there. If you're a small business, don't focus only on small businesses; are there not-for-profits, networks, grant-makers or government agencies doing something similar? If there are, don't despair. Where are they positioning themselves? What opportunities are they missing? How is their message getting lost? Capitalize on the work they've done and iterate to your advantage. For each, fill in.

For-Profit:

Similarities: Differences: Opportunities:

Not-for-Profit:

Similarities: Differences: Opportunities:

Hybrids:

Similarities: Differences: Opportunities:

Grant-Makers:

Similarities: Differences: Opportunities:

Government Agencies:

Similarities: Differences: Opportunities:

Networks:

Similarities: Differences: Opportunities:

Gaps

Let's bring it on home. Having looked at the landscape, what, if anything, did you notice was missing? Maybe it's companion services, maybe it's an approach, maybe it's entire service industry. Pay attention to the gaps. How do your services fill this gap? And what solutions do you have for the problems you encountered?

Existing gaps:

Our Service(s) fill this gap by: _____, _____, _____

The Problems we found:

Our Solution(s):

What Else Are You Forgetting?

What other steps or hurdles could you be forgetting?

Stuck? That's what we're here for.
Email or give us a call

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