

Mission: To lead social sector organizations toward excellence in performance

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Drucker Foundation Self-Assessment Tool: Content

How to Develop a Mission Statement

Changing the mission -- or creating an organization's first mission statement -- is a process of gathering ideas and suggestions for the mission and honing them into a short, sharply focused phrase that meets specific criteria. Peter Drucker says the mission should "fit on a T-shirt," yet a mission statement is not a slogan. It is a precise statement of purpose. Words should be chosen for their meaning rather than beauty, for clarity over cleverness. The best mission statements are plain speech with no technical jargon and no adornments. Like the mission statement of the International Red Cross -- "*To serve the most vulnerable*" -- they come right out and say something. In their brevity and simplicity is power.

Mission: *Why you do what you do; the organization's reason for being, its purpose. Says what, in the end, you want to be remembered for.*

The work plan to develop a mission statement calls for a writing group to develop a draft statement and recommend it for the board chairman's endorsement, who then proposes the mission statement for approval by the board. Some groups are able to develop a revised mission very quickly, while others conduct the work over a period of weeks or even months. If the mission is being revisited outside a full self-assessment process, the writing group must, at bare minimum, be able to identify the organization or initiative's primary customer and what the goals and results should be. If understanding or agreement is insufficient on these key points, deeper involvement in the self-assessment process is necessary before an effective mission statement can be developed. If the mission is being revisited within a full self-assessment process, Steps 2 to 8 in the following plan may be condensed.



Work plan for developing a mission statement

Step

Who's Responsible

- | | |
|---|-------------------------------------|
| 1. Establish a mission-writing group (may be the Assessment Team).
● Choose a facilitator and writer | Chief executive |
| 2. At a first meeting of the writing group:
● Adopt criteria for an effective mission statement.
● Gather ideas and suggestions for first drafts. | Chief executive, facilitator |
| 3. Develop one or more draft statements. | Writer |
| 4. In a second group meeting, judge initial drafts against criteria and suggest revisions or new options. | Writing group, facilitator |
| 5. Develop second drafts. | Writer |
| 6. Gain feedback from outside the writing group. | Chief executive, others as assigned |
| 7. Summarize feedback and distribute second drafts and summary to the writing group. | Chief executive, writer |
| 8. In a third group meeting:
● Make recommendations for final revisions and propose a draft mission statement for board approval; or
● Sum up the status of the process and determine next steps. | Writing group, facilitator |
| 9. Give preliminary endorsement to the proposed mission statement. | Board chairman |
| 10. Present the proposed mission statement for board approval. | Board chairman |



Step 1: Establish a mission-writing group

The task of the mission-writing group is to agree on a draft mission statement to be presented to the governance body for approval. The Assessment Team doubles as the writing group, or a special team may be convened. Members should include the chief executive, the board chairman or another representative of the board, a writer, and a manageable number of additional members who represent different parts of the organization and who are keen to take on the task. Having a facilitator is helpful. It can be particularly beneficial if this individual has facilitated other parts of the organization's self-assessment process.

Step 2: Adopt criteria for an effective mission statement; gather ideas and suggestions

for first drafts

The "too many cooks spoil the broth" syndrome that besets so many writing groups is substantially avoided by agreeing on a recipe in advance. Prior to a first meeting, writing group members should review Peter Drucker's discussion on mission in the Participant Workbook and Worksheet 4, which contain criteria for an effective mission statement. At a first meeting, the writing group should post these criteria on a flip chart or chalkboard, review them, consider amendments, and adopt the criteria they will use to judge the effectiveness of the mission they are about to develop.

The suggested criteria for an effective mission statement are that it:

- Is short and sharply focused
- Is clear and easily understood
- Defines why we do what we do; why the organization exists
- Does not prescribe means
- Is sufficiently broad
- Provides direction for doing the right things
- Addresses our opportunities
- Matches our competence
- Inspires our commitment
- Says what, in the end, we want to be remembered for

Following the adoption of criteria, the group moves on to ideas and suggestions for the mission statement. This exercise begins with reviewing the suggestions from a self-assessment retreat or second group discussion, then adding to them. If the mission is being revisited outside a full self-assessment process, the group moves directly to generating new ideas and suggestions. What is important at this point is to develop the widest possible set of options without being overly critical of any. The facilitator records the groups' responses. Idea-generating techniques include:

- Open brainstorming: any thought or idea is welcome.
- Each group member finishes the sentence, "The mission should be. . . ."
- Small teams "compete" in a very short time span to draft and nominate the "best" new mission statement.
- Go around the group two or three times asking for the *one* word that *must* be in the mission statement.
- Each person quickly draws a picture of the mission, then "shows and tells."

To conclude the exercise, the group:

- Posts and reviews all ideas and suggestions. The facilitator draws a circle around the words or phrases that appear most often.

- Discusses key ideas or themes that *must be* captured in the new mission statement.
- Discusses key ideas or themes that *must not be* part of the new mission statement.

Step 3: Develop one or more draft statements.

Following the meeting, the writer—either alone or with a small subgroup—develops drafts of at least *two* possible new mission statements that are distributed before the next meeting.

Step 4: Judge initial drafts against criteria and suggest revisions or new options

The second meeting of the writing group should begin with a discussion of the protocols (outlined next) that will be followed to judge the drafts and make suggestions. People should also be encouraged to "listen between the lines." This step in the process is highly structured, but on more than one occasion, someone in a group offers a comment or phrase that turns out to be the perfect nugget on which to build the new mission statement. If the group has a "Eureka! moment," go with it.

To judge drafts and make suggestions:

- A. The group reviews the criteria for an effective mission statement.
- B. The first draft statement is posted on a flip chart or writing board at the front of the group.
- C. Group members individually rate the draft as *meets*, *meets somewhat*, *doesn't meet* for each criterion.
- D. The facilitator polls and records the group's response for each criterion to determine the overall strengths and weaknesses of the draft.
- E. The group first discusses the merits of the draft and then makes specific suggestions for how it might be improved.
Note: The group is not engaging in collective editing or rewriting. All suggestions -- even if they contradict one another--are encouraged and recorded.
- F. The second draft statement is posted and steps C-E are repeated.
- G. The group compares and contrasts its reactions to the two drafts.
- H. The facilitator instructs each group member to be ready to write, then gives the group two minutes to individually write their recommended mission statement at this point. At the end of the writing time, members read their statement aloud, then all are collected and given to the writer.
- I. The meeting concludes with discussion to determine:
 - Whether the group believes it already has developed an effective statement to put forward.
 - Whether the writer should return a single modified draft or two options.
 - What the writer should most keep in mind when developing the next draft(s).
 - Who outside the group might be asked for feedback on the emerging statement or next draft(s).
 - Setting the group's next meeting.

Step 5: Develop second drafts

Following the meeting, the writer or small subgroup develops a second draft of one or more possible new mission statements.

Step 6: Gain feedback from outside the writing group

This step puts the emerging statement or draft(s) to the test for their resonance with other members of the organization. The board chairman and chief executive decide who outside the writing group will be asked to give feedback. In some settings, organizationwide input is invited. In others, a smaller group of respondents is selected. There may also be value in gaining feedback from a few key informants outside the organization. The chief executive oversees the process of gaining feedback. If the board chairman is not already a member of the writing group, his or her feedback at this point is essential. Each individual or group being contacted for their response is:

- A. Shown the criteria for an effective mission statement.
- B. Asked for a rating of each draft, based on the criteria (*meets, meets somewhat, doesn't meet*).
- C. Asked for comments on the merits and weaknesses of the draft(s).
- D. Asked for ideas or recommendations for improvement.

Step 7: Summarize feedback and distribute second drafts and summary to writing group

Step 8: Propose a draft mission statement or determine next steps

With some groups, the process for developing a mission statement flows with ease to a unanimous and enthusiastic conclusion. With most, the process proves demanding but worthwhile when a strong statement emerges. A small number of groups come to feel they have been given the riddle of the Sphinx.

Mission-writing groups may choose to propose more than one statement for the board chairman or full board to consider, may ask for a board discussion to gain input and direction, or may simply go into another round of drafts and keep at it until the issue is resolved. If a group truly gets stuck, it may be helpful to let the task lie for a time and come back to it or take the challenge to a specialist outside the organization and gain a completely fresh perspective. As Peter Drucker reminds us, "What counts is not the beauty of the mission statement. What counts is your performance." It may, in the end, be most preferable to suggest an interim statement and live with it for a time before making a final decision.

At a third meeting, the writing group:

- A. Reviews the emerging statement or second draft(s).

- B. Hears and discusses a summary of feedback from outside the writing group.
- C. Again rates the draft(s) against criteria and cites merits and weaknesses.
- D. Attempts group editing or rewriting if there is agreement that they are "close and it's worth a try."
- E. Determines if they have a strong enough draft to propose for approval.
If so, the group makes final suggestions for fine-tuning and approves its proposed mission statement.
If not, the group sums up the status of the process and recommends next steps.

Step 9: Gain preliminary endorsement of the proposed mission statement

If the mission is being revisited as part of a comprehensive organizational self-assessment process, preliminary endorsement by the board chairman is necessary before the Assessment Team confirms goals for the plan. The board chairman's preliminary endorsement is always necessary before he or she presents a proposed mission statement to the full board for approval.

Step 10: Present the proposed mission statement for board approval

The board chairman presents the proposed mission statement as part of the organization's plan or as a separate item of business. The approval of the mission is one of the board's most important strategic planning responsibilities. If the board rejects a proposed mission, consideration of goals is postponed until a mission is approved.

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320 Park Ave 3rd Fl
New York, NY 10022 USA
Tel: +1 212-224-1174
Fax: +1 212-224-2508
Email: info@pfd.org
Web: drucker.org