



# **A Colleague's Perspective on Mission and Vision Statements**

by William Graustein

When you get down to it, the reason a charitable foundation exists is to change the world or, at least, change that part of it that you particularly care about. Foundations exist to make something happen that most likely wouldn't happen otherwise. From this perspective, both the task of a foundation and the responsibility for setting its direction can seem pretty formidable. To keep from feeling overwhelmed, it is often useful to think about such change in terms of vision, mission and strategy. Each of these concepts can be thought of as an answer to a simple question:

- Vision - What would a better world look like?
- Mission - What change do we want to make in the present world to bring about our vision?
- Strategy - How will we go about trying to make that change?

Changing the world usually means making some change in the way people interact with each other. There is a continuum in the degree of your own involvement between the actions you take and things that other people do. These three questions are one way of dividing up that continuum into smaller pieces that are easier to think about and to work with. Asking the questions together also reminds us that the smaller pieces need to fit together and that the job of operating a foundation involves keeping all three in balance.

Because we are creatures of habit it takes some stretching of our minds to think about how things might be different or how we might do things differently. As physical stretching is often done in preparation for some sport, so this mental stretching is also preparation for engagement with others. The exercise of creating a mission statement puts us and our colleagues through the mental calisthenics that do the stretching. This exercise can build a sense of belonging to a team, as we learn from each other and come to know what to expect of one another. Building a team helps us understand the game more clearly and understanding the game enables us to explain it to others and invite them to join in. When others join us, the world starts to change.

Let me give an example. Thirty years ago, soon after my father's death, I became one of the trustees of a foundation that he had started in memory of his late brother, William Caspar Graustein. The assets were a few hundred thousand dollars and the other trustees and I felt reasonably comfortable in making contributions to the same institutions my father had given to during his lifetime and in doing our business with a few memos and phone calls a year.

About ten years ago the trustees saw that, as the result of several unexpected events, the Memorial Fund's assets and distributions would soon increase about a hundred fold. We felt both the challenge and the opportunity and did three things quickly. First, because of the history of my family, we decided that supporting some aspect of education would be an appropriate memorial. Second, each of us felt that we knew next to nothing about education.



Third, we decided to find some way to select a specific goal so that we could learn something about education and measure our progress.

We hired an experienced foundation executive to consult with us. He proposed to interview thirty knowledgeable people about their views of needs in education and opportunities for a program of grantmaking. We also set up an advisory panel to help select informants and to discuss the findings. The interviews sounded like they would be interesting conversations, so I asked to sit in on some of them. I found many of the informants so passionate about their work, and my initial perspectives so challenged and stretched, that I felt like I was being pulled by my lapels across the table into the discussion. The consultant and I would later talk over what we had heard and our reactions to it. The interplay of the similarities and differences in our experiences caused further stretching. These conversations, and our reflections on them, were so stimulating and powerful that I asked the other trustees and advisors to join in at least one of the interviews. The real labor of defining our mission and direction began in this widening of the circle of conversation.

I had grown up hearing stories of how those in my family had viewed and used their education as a way of imagining their goals and providing the tools to accomplish them. Both this attitude in general and the specific insights they passed along were so much a part of my childhood that they had seemed commonplace. Encountering the passions and perspectives of our informants help me recognize more clearly what was remarkable about the attitudes and action of my family since my grandfather's immigration to this country. We trustees reflected on our own experiences of education in light of these conversations and began to develop a clearer sense of the legacy of insights and values of which we are also stewards. In writing our mission statement, which is included among those in this packet, we tried to capture the most enduring aspect of this process of discovery.

Our mission statement is a shorthand reminder of what informs and energizes our actions and of what we bring to the conversations with those whom we seek to affect. Such shorthand is useful only in a context of common understanding; the process of communication requires as much attention as the process of discovery. In our annual report and other publications we present not only the mission, but also our goals, guidelines, values, strategies, practices and history, which together form the context for the mission and express our vision of what we try to accomplish. Our success depends on communicating our purpose in such a way that it speaks to the condition of those whose actions will change the world.

*(William Graustein is a trustee of the William Caspar Graustein Memorial Fund in Hamden, Connecticut.)*