

Building a Shared Foundation for Purpose and Direction

A Practical Process for Developing Purpose, Vision, Mission, Values, and a Leadership Declaration

Purpose, vision, mission, and values are not meant simply to describe a group. At their best, they help people make decisions, set priorities, and remember what matters when choices are difficult.

Over the years, I have helped develop these statements as a team member, senior leader, CEO, and facilitator. Each role gave me a different view of the work, but I kept seeing the same thing: people are more likely to understand and live by language they helped shape.

If the senior leader has already settled on the answer, the group may improve the wording, but its members have not really helped shape the direction. If the conversation has no focus, the group may produce a statement that says everything and guides nothing.

People need freedom to think and speak openly. They also need a clear question and someone who can keep the conversation moving toward a useful conclusion.

In this resource, I refer to purpose, vision, mission, values, and a leadership declaration as foundational statements. Together, they help people understand why the group exists, where it is going, what it does, how its members intend to work together, and what they should expect from those who lead.

An individual may use these questions to clarify personal purpose, direction, and values. A family or small group may not need all five

statements. Use the parts that fit the setting. The underlying questions can still help bring clarity.

Why the Distinctions Matter

Purpose, vision, mission, and values are sometimes used as though they mean the same thing. When that happens, the statements begin to overlap and become less useful.

Each one answers a different question.

Foundational statement	Central question	What it contributes
Purpose	Why do we exist?	Expresses the enduring reason the group exists
Vision	Where are we going?	Describes the future the group is working toward
Mission	What do we do?	Identifies the essential work that moves purpose toward vision
Values	How will we live and work?	Guides behavior, relationships, and decisions
Leadership declaration	Who are we becoming as leaders?	States the commitments leaders make to one another and those they serve

The statements belong together, but they are not interchangeable.

Purpose should endure. Vision looks ahead. Mission clarifies the work. Values guide the way that work is done. A leadership declaration makes those expectations personal for the people who have been trusted to lead.

Once those distinctions are clear, the next question is how a group develops the statements together. The work begins before people gather and is not complete until the final words begin to guide real decisions. I will first explain how I prepare and guide the conversation. Then I will describe the two stages I use for each statement.

Before People Gather

What happens before the group gathers often determines how useful the conversation will be.

Start by deciding why the group is gathering, who should participate, and what will eventually be decided. Everyone should also understand who holds final authority. In some settings, the participants will decide together. In others, a board or senior leader will make the final decision after listening carefully to everyone involved.

Participants should receive a simple definition of the statement being considered and two or three questions to think about beforehand. I prefer to ask people to write their answers independently before hearing from anyone else. This gives quieter people time to think and keeps the first strong opinion from shaping every answer that follows.

Whoever guides the process should also review what already exists. This may include governing documents, earlier statements, strategic plans, feedback from employees or others affected by the work, and language the group already uses. These materials provide helpful context, but they should not predetermine the outcome. When appropriate, some of these materials may also be shared with participants in advance.

At the beginning of the meeting, I establish a few simple expectations:

- We are here to listen as well as speak.
- Every person's contribution matters.
- We will not evaluate ideas while they are first being offered.
- We will stay with the question before us rather than trying to solve everything at once.
- We may disagree, but we will do so honestly and respectfully.

A skilled facilitator can be helpful, but a leader who understands the responsibility can also guide the conversation. The important thing is knowing the difference between leading the discussion and supplying its answers.

Good preparation creates the conditions for an open and useful discussion. What happens next depends greatly on how the conversation is guided.

How I Try to Guide the Conversation

My job as a facilitator is not to provide the answers. It is to help people hear one another, manage the pace, invite voices that have not yet been heard, and stay with the question long enough for the group's best thinking to emerge.

I also record every contribution where people can see it, usually on a whiteboard or large sheets of paper. During the first part of the conversation, I do not decide which ideas are most important or tell someone that a thought belongs somewhere else. The sorting can come later. People need to know that their contribution has been heard before they will trust the process.

When I am the senior leader, I have to know when to speak and when to wait. People naturally look for the leader's preference. If I offer my answer too quickly, even experienced people may begin adjusting their thinking to match mine. The way a leader first responds to disagreement often determines whether people continue to speak honestly.

When I participate as a member of the group, my responsibility is to say what I believe without becoming so attached to my wording that I can no longer hear another point of view. An open mind does not require me to surrender my convictions. It means I remain willing to discover that someone else may see something I have missed.

Humility matters in every role. No one person has to carry all the answers. A prepared group that is free to think will usually develop something stronger than any one person could have produced alone.

When people know they will be heard, the group is ready to begin shaping the statements themselves.

Two Stages for Each Statement

For each of the five statements, I have found it helpful to work in two stages.

Gather and Discern

The first conversation begins with people sharing the responses they prepared beforehand. Each person should have an opportunity to contribute before the group begins evaluating or combining ideas.

As I listen, I look for ideas that keep returning, words people care about, and places where they see things differently. I record contributions that may reach beyond the immediate question rather than discarding them. They can be sorted later.

The goal is not to reach a polished answer as quickly as possible. It is to understand what people genuinely believe.

There is often pressure to hurry toward the final wording. I have learned to stay with the question a little longer. People usually reach a stronger answer when they have first had time to hear themselves and one another think.

Draft and Decide

After the gathering session, the facilitator or a small drafting group organizes what was heard and develops two or three possible statements. Whenever possible, the drafts should use words the participants themselves offered.

When the participants reconvene, they should do more than take a quick vote. They can identify what is strongest in each version, talk through the differences, and refine the language until it expresses a direction they are prepared to live by.

The final wording should be simple enough to remember. Long statements may contain many worthwhile ideas, but they rarely guide everyday decisions. Purpose, vision, and mission can usually be expressed in one or two sentences. Values work best as a short list of memorable words or phrases, each supported by a brief description.

A leadership declaration may include several commitments, but it should still be short enough for leaders to remember and use.

Everyone should understand how the final decision will be made. Inviting people into the process does not mean every decision must be unanimous. It means people are heard, differences are considered honestly, and the final decision is explained clearly.

The questions change from one statement to the next, but the two stages remain the same. We can now look at the particular work each statement is meant to do.

Purpose

The question behind purpose is simple:

Why do we exist?

Purpose is the most enduring of the foundational statements. It expresses why the group matters beyond its present programs, products, activities, or structure. Leaders and methods may change, but a well-formed purpose should remain relevant.

Questions to Consider Beforehand

1. If someone unfamiliar with our group asked why we exist, what would we most want that person to understand?
2. If we were faithfully fulfilling our purpose, what difference would we hope to see in the lives of people or in the world around us?
3. What has been entrusted to us that should remain true even when leaders, programs, products, or seasons change?

People often begin by describing what they do. I try to help them move beneath the activity by asking, 'Why does that matter?' or 'What difference are we ultimately here to make?'

A simple test: Does the statement give a clear and enduring answer to why this group exists?

Vision

The question behind vision is:

Where are we going?

Vision describes a future the group believes is desirable and worth pursuing. It should be clear enough to direct attention and compelling enough to call people forward.

Questions to Consider Beforehand

1. If we fulfill our purpose in the years ahead, what future do we believe we can help create?
2. What would be visibly different for the people we serve, for our group, or for the community around us?
3. Which need or opportunity are we particularly called and equipped to pursue in this season?

Vision should be more than a broad aspiration, but it does not need to contain every goal or measure. Those belong in the later work of planning and execution. Vision gives people a shared picture of the future toward which that work is directed.

A simple test: Can people see where we are going and use that picture to decide what deserves attention now?

Mission

The question behind mission is:

What do we do?

Mission identifies the essential work the group must carry out to fulfill its purpose and move toward its vision. It should provide focus without permanently tying the group to methods that may eventually need to change.

Questions to Consider Beforehand

1. What essential work must we do consistently to fulfill our purpose and move toward our vision?
2. Whom do we serve, and what do we help them experience, accomplish, or become?
3. Which parts of our present work are truly central, and which are methods or programs that may change?

This conversation often produces a long list of activities. The challenge is to distinguish the group's central work from the many ways that work is currently performed.

A simple test: Does the mission make our essential work clear enough to guide roles and priorities?

Values

The question behind values is:

How will we live and work?

Values identify the convictions that guide behavior, relationships, and decisions. They become most visible when people are under pressure, facing disagreement, or deciding between competing interests.

Questions to Consider Beforehand

1. When we are at our best, what convictions guide our behavior, relationships, and decisions?
2. How do we expect people to treat one another and those we serve, especially during pressure, disagreement, or failure?
3. Where is there a gap between the values we claim and what people actually experience?

A group should not claim a value simply because it sounds admirable. A value may express a commitment the group is still learning to live, but its leaders should be honest about the gap.

Each value should eventually be connected to what people should actually see and experience. If we say we value respect, what does respectful behavior look like? If we value excellence, how should that affect preparation, quality, and accountability?

The words become useful when people can recognize the value in everyday behavior.

A simple test: Can people describe how each value should guide them on an ordinary day and when pressure rises?

Leadership Declaration

The question behind a leadership declaration is:

Who are we becoming as leaders?

A leadership declaration makes the group's values and expectations more personal for those who lead. It describes the character and practices the leadership team commits to embody together.

Questions to Consider Beforehand

1. Who must we become as leaders to carry our purpose, vision, and mission faithfully?
2. How will we listen, communicate, make decisions, handle disagreement, and hold one another accountable?
3. What should every person we lead, and every member of this leadership team, consistently experience from us?

The strongest declarations are usually brief, direct, and written in the first person plural:

We will listen.

We will speak honestly.

We will honor one another.

We will take responsibility.

The declaration should describe commitments leaders are prepared to practice, not qualities they merely admire.

A simple test: Does this declaration describe the kind of leadership people should experience from us, and are we willing to help one another live it?

From Words to Daily Practice

Finishing the statements is not the end of the work. It is the beginning.

Statements displayed on a wall do not create a healthy group. They matter when they affect priorities, decisions, and the way people are treated. Purpose should influence where the group invests its energy. Values should shape everyday relationships. A leadership declaration should affect the way leaders actually lead.

Leaders have to embody what the statements say and welcome honest conversation when there is a gap between the words and people's experience.

The group's practices must support what it has declared. Hiring, orientation, development, evaluation, recognition, promotion, and accountability should reinforce the same commitments. When the group rewards one thing while its values say another, people will believe what is rewarded.

Leaders should also return to these statements from time to time. The goal is not to rewrite them continually. It is to ask:

1. What are we living well?
2. Where have we moved away from what we said matters?
3. What decisions or practices need to change?

The greatest test is not whether people can recite the statements. It is whether people experience them.

The Whole Process in One Place

For easy reference, here is the complete process from preparation through follow-through.

1. Review existing documents, feedback, and other helpful information.
2. Decide who should participate and who holds final authority.
3. Give participants a clear definition and questions to consider beforehand.
4. Gather everyone's thinking without evaluating it too quickly.
5. Develop two or three possible statements using the participants' language.

6. Reconvene, refine the wording, make the decision, and communicate it.
7. Bring leadership behavior, priorities, and everyday practices into agreement with the statements.
8. Return to the statements periodically and address places where the group has moved away from them.

The amount of time required will vary. A family or small team may complete the work in a few focused conversations. A larger organization may need broader listening and more time between meetings.

What matters is not the number of meetings. It is whether the process produces language people understand and commitments they are prepared to live.

These statements cannot create a healthy group by themselves. But when people help shape them and leaders take them seriously, they provide a foundation for deciding what matters, where the group is going, how people will work together, and what leadership should look like.

That is when words begin to become a shared foundation.

Companion Resources

Practical Guidelines for Getting Things Done offers the next practical step by turning shared direction into priorities, clear responsibility, action, and regular review.

Building a Culture That Lives Its Values considers how purpose and values become part of everyday behavior, relationships, decisions, and long-term ownership.

Coaching with the Questions of Jesus explores how careful listening and thoughtful questions can help people think more deeply and contribute with greater clarity.

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