

Successful Service Transformation

Developing your Organisational Vision

Introduction

Developing, crystallising, agreeing and bringing to life your vision for your organisation's future is a significant part of an organisational improvement /change process. It ensures that your improvement activity is focussed in the right direction. It also helps to energise and motivate people to keep making improvements and to use the improvement tools in a positive way.

This document provides guidance to help leadership teams and facilitators develop, crystallise and agree a vision for your organisation's future. If you require further guidance and support for effective facilitation, contact The National Archives Sector Development Team.

Who should be involved?

All leaders (as identified in your 'organisational model') should be involved in the vision setting session(s) to ensure there is complete commitment and support for your direction and improvement activity. Other staff (including volunteers) and partners could also be involved in the sessions.

The role of the facilitator

The sessions need to be led by a skilled facilitator, who could be a member of the team, someone from another department, a partner, or an external specialist. Often, critical friends are invited to the sessions to provide an external challenge (this role could be played by the facilitator).

The facilitator's aim is to generate discussion amongst the team members and to challenge their thinking. This is mostly achieved by asking a series of challenging questions (see the page).

Large groups could be split into sub-groups to ensure that everyone is encouraged to share their views.

The facilitator (or team members) should capture the responses on flipchart. Large coloured stick notes can also be useful, as they enable the facilitator or team members to move and group people's thoughts and ideas in view of the rest of the team.

Underlying method

During these discussions, the team should be aiming to reach a consensus view. A consensus view is 'win/win', not 'lose/win', 'lose/lose' or 'democracy'! It requires the following beliefs and habits amongst the team members:

- Everyone's perception of the organisation is right and valuable – your goal is not to persuade everyone that your view is right!
- Everyone's collective perceptions will create insight which is 'greater than the sum of the parts'
- "Seek first to understand then to be understood" (Seven Habits of Highly Effective People, by Stephen Covey)

Questions for facilitators and critical friends

Use the following questions to trigger discussion, visionary thinking and consensus during your vision setting session(s).

Our legacy

- a. What are we and our partners aiming to achieve ultimately through our work?
- b. What do we want our community to be saying about what we have achieved for them? What difference will we make to people's lives?
- c. What do you want to see written on your organisation's headstone?
- d. What makes this legacy really exciting?

The sort of organisation we need to become?

- e. To achieve our legacy, what do we need our organisation to be like?
- f. Imagine it is three years from now. Give yourself permission to dream. You have been completely successful in changing your organisation...it is now a role model, with the capability to achieve your legacy.

What does everything now look like?

What are people now saying about us?

What does the organisation now feel like to work in?

What tangible changes have been made?

- g. How will achieving these changes benefit the community?
- h. What could happen if we didn't achieve these changes?
- i. How will we know that when we have achieved these things?

Collective commitment to our Vision

- j. On a scale of one to ten (ten being passionately committed to this vision, one being not committed at all) where are you? What would it take to get you to a ten?
- k. Whom should we communicate our vision with?
- l. How should we communicate our vision?