



THE UPSTREAM ENVISION PROCESS

The purpose of vision development is to create a vision document that every stakeholder will connect to and get excited by. It represents a clear and compelling mental picture of what an organization is and what it will become. An organization's vision becomes the foundation with which all other planning must align.

THE IMPORTANCE OF VISION

According to Jim Collins in his study of enduring great organizations *Built to Last*, "A well conceived vision consists of two major components – core ideology and an envisioned future. A good vision builds on the interplay between these complimentary yin-and-yang forces: it defines 'what we stand for and why we exist' that does not change (the core ideology) and sets forth 'what we aspire to become, to achieve, to create' that will require significant change and progress to attain (the envisioned future)." Collins depicts the co-existence of these two interdependent forces in the fundamental yin and yang graphic as "*preserve the core/stimulate progress.*" Leaders of great organizations understand the fundamental importance of vision; therefore the UNW Envision Process is centered on discovering and creating these two major interdependent components.

PLANNING HORIZONS

To gain a better perspective, it is important for leadership to understand the four planning horizons that are used by successful organizations today. These horizons significantly differ in strategic focus and the length of planning time. Organizations that successfully employ the four planning horizons understand the difference between what should never change, and what should be open to change. They are aware of the difference between what is genuinely sacred and what is not. This rare ability to manage continuity and change is facilitated by the development and use of the four planning horizons.

These horizons are defined as:

- VISIONARY – The Ten to Thirty Year Vision Horizon
- ASSUMPTIVE – The Five to Ten Year Critical Assumptions Horizon
- STRATEGIC – The Three to Five Year Strategic Planning Horizon
- TACTICAL – The One Year Execution Planning Horizon

ENGAGEMENT APPROACH

At Upstream Northwest, we utilize a three stage engagement approach; preliminary, facilitation, and follow-up.

PRELIMINARY – THE ENVISION SURVEY

We prepare the participants by having them complete some advance work that gets them in the right frame of mind for the retreat. The survey also enables us to get the perspective of the different leaders and/or stakeholders involved in the process. Having each participant complete a short one-page survey describing their experience with and vision for the organization accomplishes these objectives. The team leader will select the individuals participating in the survey representing appropriate stakeholders as necessary. The electronic format we use makes the survey process flow very efficiently. Following the survey, we compile and utilize the responses at the retreat.

FACILITATION - THE ENVISION RETREAT

The retreat is recommended to be held off-site, will involve a vision team and generally run 8 hours. The process usually involves approximately 1 hour for the introduction, 5 hours to draft the language for the four parts of a vision statement, and 2 hours to create the completion and roll out plan. We utilize alternating teams and the full group during the process. The vision statement or document will be composed using the following framework:

THE VISION DOCUMENT

- **CORE IDEOLOGY**
 - *Central Purpose.* The group will develop a concise statement that describes the organization's central purpose – its reason for being.
 - *Core Values.* Next, the group will discover and identify the core beliefs shared by everyone in the organization. These are things you really believe in, not simply a recitation of the things you think everyone wants to see.
- **ENVISIONED FUTURE**
 - *Audacious Goal.* Next the group will identify an audacious goal to be accomplished in a 10 to 30 year horizon. This goal should be clear, concise and something that you will really have to stretch to accomplish but will excite everyone every day because they understand the impact it would have on their own lives.
 - *Vivid Description.* Finally, the group will write a brief description of what the future would be like for the organization, it's leaders, the employees, and the community if the audacious goal were accomplished. This will help

communicate the importance of accomplishing the audacious goal to each individual.

We would expect to have a draft of a vision document completed by the end of the retreat.

FOLLOW UP - POST-RETREAT VISION STATEMENT COMPLETION

Following the retreat, it will be necessary to do a final version of the vision statement. We suggest that you select a vision drafting team from the group of participants to prepare the finished vision statement from the draft information developed at the envision retreat. The members of the drafting team and an outline of the work they will be doing can be announced at the retreat. We will work with you and your team to finish the final statement.

ACCESS TO GUIDES

As a part of this process, you will have open access to Upstream Northwest guides if needed to assist with vision implementation questions that may arise during entire process.

PRICING

We understand undertaking a process such as organization vision represents an investment, not an expense. It will be transformational and have lasting value. Once we have had the opportunity to understand the needs, scope and logistics of the client, we will create a proposal with an all-inclusive price.

VALUE GUARANTEE

Satisfaction with Upstream Northwest services is fully guaranteed. If you are not completely satisfied with the value you receive, we will, at your option, either refund the fees paid under this agreement, or accept a portion of those fees that reflects your level of satisfaction.

We look forward to guiding you and other leaders of your organization in this important foundational process enabling you to understand who you are and where you are going.