*Five Stages of Building a Shared Vision*

A close up of a piece of paper

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| **Stage** | **Description** | **How to Make the Most of this Stage** |
| Telling | “We’ve got to do this. It’s our vision, be excited about it or else”; usually happens in a crisis when dramatic change is perceived necessary; people do not get a vote | * Inform people directly, clearly, consistently (i.e. letters, videos, speeches) * Tell the truth about current reality so people understand the reason for change * Be clear about what is negotiable and not * Paint the details, but not too many details |
| Selling | “We have the best answer. Let’s see if we can get you to buy in”; leader seeking people to “enroll” in the vision, garnering as much commitment as possible | * Keep channels open for responses (e.g. follow up communications like trainings/speeches/messages with focus groups to get authentic voice) * Support enrollment, not manipulation * Build on your relationships with employees with willingness to rethink and retool the vision * Focus on benefits, not features (how will change serve the needs, desires, hopes of staff) * Move from the royal “we” to the personal “I” by speaking personally about the meaning and power of the vision |
| Testing | “What excites you about this vision? What doesn’t?; leader lays out the vision for testing, using results to refine and redesign the vision, goals, and strategies; people must feel safe and willing to tell the truth | * Provide as much information as possible, to improve the quality of the responses * Make a clean test – do not facilimanipulate people choice between options A, B, and C, for example. * Protect people’s privacy, or at least ensure no penalty for negative responses or critiques; invite criticism * Combine surveys with face-to-face focus groups and interviews; consider channel richness in multidirectional communications * Test for motivation, utility and capability – do people want to move toward the vision? Do they believe the vision is useful and that the school is capable of reaching it? If not, what is missing? |
| Consulting | “What vision do members recommend that we adopt?”; staff is both coming up with suggestions and fully exploring the potential positive and negative consequences of implementation, as well as how to begin moving toward the vision | * Use a cascading process to gather information by engaging small groups throughout the school to iterate on the vision * Build in protections against distortion of the message when passing between groups – how can you avoid playing telephone through rich, clear communication? * Knit together multiple visions from the school into an interdependent whole, allowing visions to be anchored to local teams and existing networks |
| Co-creating | “Let’s create the future we individually and collectively want”; place all school staff into a creative orientation; allow for choice throughout the process; articulate common purpose and values | * Start with personal vision, allowing alignment to organically emerge * Treat everyone as equal * Seek alignment, not agreement – use skillful discussion and dialogue to look for assumptions beneath the disagreement and identify the mental models that have led to disagreement * Among teams, encourage interdependence and diversity * Avoid “sampling” * Have people speak only for themselves * Expect and nurture reverence for one another * Consider using an interim vision to build momentum, even if it is brief, rough, and intuitive * Focus on the dialogue, not just the vision statement. Co-creation is a journey not a destination. Process > product |

Adapted from P. Senge, A. Kleiner, & C. Roberts, *The Fifth Discipline: Strategies for Building a Learning Organization* (2011).