

LESSON 3

Establishing a Common Vision



Quick Write

Write a one-sentence description of a project that would require teamwork to complete—for example, organizing a school recycling drive or a neighborhood cleanup. What would be your vision for the project?



Learn About

- the importance of a common vision
- writing a team charter
- enlisting others to work toward a common vision

The Importance of a Common Vision

If someone asked you to join a group or team, your first question would probably be, “What is its purpose?” For example, someone might ask you to join a committee at school that plans to hold a class cookout over spring break. Or you might agree to help a group of neighbors who want to organize a multifamily garage sale and give the proceeds to a local shelter for the homeless.

In addition to asking about the group’s purpose, you would also want to know your role on the team and the roles of other team members. Finally, you would want to know when the group would do the work.



A team works best when its members share a common vision and agree on each person’s role.

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Vocabulary

- vision
- team charter
- vision statement
- team goal
- brainstorming
- mutual assistance
- team assignment
- timeline
- deadline
- excellence

On a broader level, you'd be interested in the team's vision. A **vision** is *an idea that inspires a team to perform well and accomplish its goals*. A vision sets out the shared values of the team. It states, in broad terms, what the team plans to accomplish. A team works best when its members have a common vision.

While a parent, teacher, coach, or boss might have a role in determining a team's vision at the beginning, it's up to members themselves to fine-tune the vision. This lets everyone feel like they're a part of the project. Developing this sense of ownership is an essential step in team building.

Writing a Team Charter

Every team should express its vision in a team charter. A **team charter** is *a document that gives direction to individual members and to the team as a whole*. A team charter helps members see the big picture and where they fit into it.

The format of the charter can vary: It can be written in a few paragraphs or expressed as a table or a flowchart. When the charter is complete, all members should receive a copy. They should refer to it as their work moves forward.

A team charter should give sufficient information to explain the team's overall vision and members' general responsibilities. The team charter, however, is not a detailed, day-to-day account of the team's activities. It includes only the main areas of responsibility—each assignment will include many tasks and duties. It's up to the team leader to assign roles for those tasks and duties and to set dates for their completion.

Who writes the charter? In some situations, the person assigning the project should develop it. In other situations, the team leader should write it. And in still other cases, team members themselves develop their charter. If the team is part of a larger organization, it may adapt the team charter to that of the organization. A 4-H club project team or a Boy Scout troop trail-maintenance team, for example, might base its team charter on the parent organization's vision or goals statement.

Every team charter should have the following elements:

- A vision statement
- Team goals
- Team members' assignments
- A timeline

In the rest of this section, you'll read about each of these four elements and how they help a team achieve its vision.

American Biographies



Walt Disney in 1950 with the wife of the prime minister of Pakistan

Department of State/Courtesy of Harry S. Truman Library and Museum

New York animators worked. He hired some apprentices and, using his gift for salesmanship, got a \$15,000 loan. With the money, he started his own company, Laugh-O-Gram Films.

The company went bankrupt, despite Disney's best efforts. He decided to move to Hollywood, where the film action was. He convinced his brother to join him there. Roy Disney would take care of the financial end of things, and Walt would be the creative genius. It was a great two-person team. Working out of a rented studio with a used camera, they set out to make the Disney name famous around the world.

When You Wish Upon a Star

Walter Elias Disney was born in Chicago, Illinois, on 5 December 1901. In 1906, the Disney family moved to Missouri and settled on a farm. Disney's Aunt Margaret often gave him tablets, and he'd draw pictures for her. Disney clearly had a talent for art. And even in his childhood, Disney was drawn toward cartoons.

As a teenager, Disney attended the Chicago Institute of Art, worked at the family business, and drew sketches for the school paper. In the summer of 1918, he joined the Red Cross Ambulance Corps. The Red Cross sent him to France for service during World War I.

Disney returned to Missouri from France in 1919, determined to become an artist. He took a job making animated commercials, a new form of entertainment at the time. Disney read books about animation and discovered how the leading

Creating a Vision Statement

The first element of the team charter is the **vision statement**, which *explains the team's reason for existing*. The writer should draft the vision statement in terms broad enough to include the team's total responsibilities. But it should be specific enough to allow team members to measure their progress as their work moves forward.

Here's an example of a vision statement for a class committee that's planning a spring cookout:

To build senior class morale and improve school spirit, our class spirit team will sponsor activities to create a sense of belonging and camaraderie among all members of our class.

talking POINT

Vision Statement Characteristics

A well-written team vision statement has the following characteristics:

- It is brief (no more than a paragraph).
- It is broadly stated.
- It explains why the team exists.
- It explains what and why, but not how.

Success didn't come quickly. But eventually Disney came up with the character that would be his key to fame: Mickey Mouse. Soon Mickey was joined by Goofy, Pluto, and Donald Duck.

By the mid-1930s, Disney had a staff of some 300 artists. Together, they created *Snow White*, the first feature-length animated film. Disney invested \$3 million to build a new studio in Burbank. Meanwhile, work proceeded on films that are now classics: *Fantasia*, *Pinocchio*, and *Bambi*.

In the early 1950s, Disney took off in a new direction: He brought together some of his studio's best creative talents to plan, design, and build Disneyland Park in Anaheim, California. Although Roy Disney was worried about the risky new venture, Walt was convinced it would work. And, of course, it did.

Disney's company became a multimillion-dollar enterprise. In 1996, Disney's creative, design, planning, real estate, and project management operations united under a single name: Walt Disney Imagineering.

Today, nearly 2,000 "imagineers" representing more than 140 disciplines are responsible for all phases of a Disney project's development—from conceptualization to design, engineering, production, construction, and installation. This blending of imagination with technical know-how has produced the world's most popular theme parks and most memorable family movies.

Imagineering has inspired more than 100 Disney-owned patents in such areas as ride systems, special effects, interactive technology, live entertainment, and fiber optics. Disney Imagineers developed the first daily operating monorail system, the first computer-controlled thrill ride, and an advanced 3-D motion picture photography system.

And it all began with a boy who liked to draw.

Developing Team Goals

A **team goal** is *an objective the team wishes to accomplish*. Team goals express what the team will set out to do. Effective team goals have four characteristics in common:

1. They are tied to the vision statement.
2. They focus on a single issue.
3. They define the vision statement.
4. They guide the team's accomplishments.

Team Goals Are Tied to the Vision Statement

Team goals should grow out of the vision statement. Each goal must relate to that statement. If it doesn't, either the goal is off track or the vision statement is poorly written.

You read the vision statement of the class team that was planning a spring cookout above. Now look at the team's draft list of goals:

1. *Plan, organize, and hold a five-hour class cookout over spring break for 400 class members.*
2. *Order 425 theme-printed class T-shirts to sell at the cookout at \$12 each. Revenue from the sale of T-shirts will contribute to the cost of the cookout.*
3. *Promote the cookout during at least three varsity sports events and during homeroom announcements.*
4. *Submit to Principal Harris a class petition of at least 250 names protesting the removal of the senior lounge soda machine.*

The team drafted these goals during a brainstorming session. **Brainstorming** is *a group problem-solving technique during which members contribute ideas spontaneously*. The purpose of brainstorming is to get as many ideas as possible out on the table. No one criticizes anyone else's ideas during a brainstorming session. Everyone's ideas count. After everyone has had a chance to give input, the group decides which ideas best support its vision.

Suppose you were a member of the team that had brainstormed these goals. Are all four goals related to the vision statement? If not, which one doesn't fit?

Can you see why Goal 4, while probably an important issue to some members of the team, doesn't relate to the vision statement? Perhaps that's a good goal for another team or committee, but it doesn't fit this vision statement. The team should delete this goal from the list.

Team Goals Focus on a Single Issue

The team goals should each focus on a single issue. For example, here's the vision statement for a team formed to plan, organize, and hold a multifamily garage sale to benefit a local homeless shelter.

The neighborhood will join together to help the local homeless shelter by holding community fundraising events this summer. The first event will be a multifamily sale, which will be held in the city fire station on June 30.

Now read the draft version of the team's goals:

1. *By June 15, rent 30, 8-foot-long banquet tables for one day. Pay no more than \$15 per table. Have the tables delivered to the fire station at 10 a.m. on June 30.*
2. *Ensure that a bunch of community members will have a good time browsing the junk everyone puts out for sale so that we can make a difference down at the homeless shelter. This will ultimately reduce the numbers of homeless people standing on street corners.*

Goal 1 is well written. It focuses on a single issue. The team is responsible for renting and obtaining timely delivery of 30 tables of a certain style and size and at a certain cost. The team can monitor progress toward this goal and evaluate the results. Either the tables will be rented by June 15 or they won't. They will cost \$15 or less, or more than that. The point is clear: Get those tables!

Goal 2 has two problems: First, it has a dual focus. Second, it's not precise. The first sentence of this goal mentions making sure that neighbors will enjoy the sale. But how many neighbors are in "a bunch?" What's "junk?" What does it mean to "make a difference?"

The second sentence in Goal 2 has problems, too. Remember that according to the vision statement, the purpose of the event was to "help the local homeless shelter." But according to Goal 2, it looks as if the main reason for the sale is not to help the homeless but to improve the appearance of the community. It sounds as if some of the planners might have their own agendas: They may be motivated by interests other than by a desire to help the homeless.

This team needs to rethink its second goal. In fact, it might divide it into two goals. The new Goal 2 should focus on community participation. It should describe the hoped-for outcome in measurable terms, such as number of buyers, sellers, and how much money the sale takes in.

The new Goal 3 should focus on how the proceeds from the sale will help the shelter. It should show how the shelter can use the money for specific improvements in services or equipment.

When goals are measurable, you can monitor your progress in reaching them. Vague language makes goals hard to attain. Finally, the goals must support the vision statement.

Team Goals Define the Vision Statement

The vision statement is broad. It emphasizes the big picture. But having seen the big picture, team members need specific information.

Think again about the cookout example. As work begins, the team forms several subteams. Each subteam will be responsible for part of the work that must be done to achieve the end result—a great, morale-building cookout. Each subteam must have its own goals. These goals are based on the vision statement. For example, one subteam might be in charge of buying food. A draft version of its goal statement might read, “Purchase the food for the class cookout.”

This goal statement supports the big picture, the cookout, but it’s not sufficiently detailed. At the least, members need to know what types of food and how much food to purchase. So the team needs to make the subteam’s goal statement more detailed. The revised goal statement might read:

1. *Purchase 100 pounds of lean ground beef.*
2. *Purchase 5 gallons of packaged potato salad.*
3. *Purchase 5 gallons of packaged baked beans.*
4. *Purchase 100 packages of hamburger buns.*

It’s important to write team goals in language that you can measure, because that’s how you’ll evaluate your success. The four goals above are easily measurable: For example, if the team has purchased 50 packages of buns, it’s halfway to reaching Goal 4. When the team has purchased 75 packages of buns, that goal is 75 percent accomplished, and so on.

But suppose Goal 4 had stated, “Purchase a number of hamburger buns for the class cookout,” or “Purchase enough hamburger buns for the class cookout.” Are those goals measurable?

As worded, those two goals have no indication of quantity. How many is “a number?” If no amount is specified, any amount could be right. In the second example, the team is supposed to purchase “enough” hamburger buns. Again, how many will be enough?

The only way to measure the results of a goal stated in this way would be to hold the cookout and see what happens. If the cooks don’t run out of buns, the goal is accomplished. (The team, however, might have purchased too many hamburger buns, resulting in costly waste). If the cooks run out of buns, the goal isn’t attained. This would be a form of measurement, but it would be an inefficient one.

Team Goals Guide the Team's Accomplishments

Well-written goals show team members what they're responsible for accomplishing, working together. If a team's charter consisted only of assignments for individual members, the members would pursue their tasks as individuals. This is why the team goal comes before individual task assignments in the charter. In other words, first the big picture, then goals, then individual assignments.

Goals promote teamwork by emphasizing mutual assistance. **Mutual assistance** is *the help and support team members give each other*. Mutual assistance gets the team's work done in the best possible way.

Think about a baseball team. Each of the nine players has his or her own assignment. The outfielders are responsible for catching fly balls and running down hits that cross the infield. The infielders are responsible for stopping balls that enter areas covered by their positions and for throwing the ball to the players assigned to cover the bases.

But sometimes a player does more than just what his or her specific position, or assignment, calls for. For example, if a bunt pulls the first baseman in on the foul line, the pitcher runs to first base to catch the throw. The pitcher does this because all team members have a shared goal: to win the game.



These baseball players had a shared goal: to win the game.

Jamie Roach/Shutterstock

Your Dreams Are Your Only Limits

In 2005, a crew of six Airmen based in southwest Asia climbed aboard a C-130 Hercules. Their mission was to transport 151 Marines and their equipment into combat.

This was no ordinary flight: It was the first time an all-female C-130 crew flew such a combat mission. The women completed the mission successfully and went on to complete others. But as unique as this flight was, the crew members didn't want all-female teams to become standard operating procedure.

"I enjoyed flying with this crew, but I don't think we should go out of our way to have all-female crews," said Captain Carol Mitchell. "It took a long time for women to become accepted as air crew members, and now that we are, we would be taking a step back by singling ourselves out rather than blending in with the rest of the Air Force."

Airman Ci Ci Alonzo agreed. "It was a great experience not many females can say they've had. However, I don't believe the Air Force should seek out all-female crews—instead, we should focus on experience."

"[The Air Force] should have the best crews they can put together," said Captain Anita T. Mack. "Nothing other than qualification and ability should be considered." Crew members suggested that one way to avoid complacency is to mix male and female fliers to get different perspectives.



The first all-female crew to fly a C-130 Hercules on a combat mission

Master Sgt Alfred A. Gerloff Jr./Courtesy US Air Force

While the all-female crew passed a unique milestone, the members pointed out that each crew member achieved her individual goals to get there.

"I encourage any woman to do what she wants," Captain Mack said. "Too often I hear people say women can't do something. That may be because they don't realize they have the opportunity. Flying is an attainable goal for anyone who wants to work for it. You are only limited in what you can do by what you can dream."

Developing Team Members' Assignments

Team assignments are the most specific part of the team charter. A **team assignment** *lets each individual team member know his or her role on the team.* The assignment may be a specific task or an ongoing responsibility, depending on the team goal.

Each member must see how his or her team assignment integrates with other members' assignments. It's important to express each assignment as clearly as possible. Assignments should not be rigid, however. The team leader should change them if circumstances require it—making needed changes is the team leader's job. The charter should also make it clear that it's every member's job to step in and help another member who needs extra support.

For example, on a baseball team, each player needs to know who is assigned to play first base, second base, shortstop, and so on. They need to know who will back up whom, depending on where the batter hits the ball. Each player also needs to know when he or she will take a turn at bat.

But these assignments don't prevent the coach from moving a player to another position or to another place in the batting order for the good of the team. The coach may give a member a temporary assignment other than the designated assignment. Or the coach might ask a team member to step out of his or her assignment to assist another member. The team member returns to the charter assignment as soon he or she finishes the temporary assignment.

Creating a Timeline

Team members need to know not only *what* they're supposed to do but also *when* they need to do it. To find out this important information, they consult the project timeline. A **timeline** *is a table that lists the dates by which individual project tasks or activities must be accomplished.*

Timelines may have two types of tasks: *ongoing tasks* and *event-specific tasks*. A team project such as a school safety-monitoring team or a tutoring club has ongoing tasks. The timeline might say, "The team leader will meet with the vice principal every Wednesday during activity period," or "Tutors will meet with the students they are tutoring at least once a week."

Other team projects, such as a school play or the class cookout, have event-specific tasks. The team must have certain tasks finished on specific dates and times, such as, "Complete the stage platform construction by Wednesday, March 29, at 7:00 p.m."

The team leader might need to revise the timeline when one task ends and another begins, depending on whether or not the team members are meeting the task deadlines.

A **deadline** is the date by which an assignment or a task must be completed. Each team member must schedule his or her work with the deadline in mind. Looking at the deadlines also allows other team members to see where each assignment fits into the overall timeline.

Deadlines—like other measurable goals—enable the team leader and team members to monitor progress.

Enlisting Others to Work Toward a Common Vision

By now you understand how effective teams work. They unite behind a vision, write a solid team charter, establish measurable goals, make appropriate assignments, follow a timeline, and evaluate their progress.



An effective coach or team leader encourages the team to work together to achieve excellence.

Monkey Business Images/Shutterstock

But what about an exceptional team? It meets its deadlines and gets the job done, to be sure. But an exceptional team aims to exceed expectations. It strives for excellence. **Excellence** is *the quality teams try to achieve that inspires them to outstanding or exceptional results*. The imagineers of Walt Disney and the six women who flew the landmark mission in southwest Asia demonstrated excellence as they worked toward a common vision. Their personal commitment to excellence was reflected in the exceptional accomplishments of the teams they were a part of.

To demonstrate excellence, team members must enthusiastically support the team's vision. Enthusiasm and dedication are important elements in moving a team toward excellence.

As a leader, you can do four things to encourage the members of your team to work together to meet their common vision and to achieve excellence:

- **Assess**—Determine which factors motivate each of your team members. Among the possibilities are praise, awards, promotion, time off, and more responsibility. Every person is motivated by different things. Match each team member with the motivational factor that works best for him or her.
- **Align**—Identify team members' individual strengths. Then assign them roles that match those strengths. People are more likely to excel in tasks they can do well and that they enjoy doing.
- **Recognize**—Give quick, positive, and specific feedback. A rule of thumb is to praise publicly and criticize privately. Link recognition to what motivates each team member: Is it public praise? A half-day off? A promotion?
- **Challenge**—Set demanding but realistic standards. Unrealistically high standards demoralize people, because they feel they will never reach them, no matter how hard they try. But if standards are too low, people will get lazy. They will not be inspired to work as hard as they can. You must also make sure that each team member can see a direct connection between his or her work and the team's results.



Michelle Kwan

Mike Liu/Shutterstock

"It's Not About the Gold"

Smiling at the crowd, figure skater Michelle Kwan walked proudly with her US teammates during opening ceremonies at the Olympic Games in Turin, Italy, on 10 February 2006.

At age 25, Kwan had already won 42 championships, including five world championships and nine US championships. She was back for a third try at Olympic gold. Previous efforts in 1998 and 2002 had earned her silver and bronze medals. Kwan's millions of fans had their fingers crossed. Figure skating, everyone knows, is a dicey sport. Skaters need grace, athleticism, determination, and a little bit of luck.

This time, Kwan's luck ran out. Just a few days after the opening ceremony, Kwan had to withdraw from the Olympics. After battling a groin injury for months, she developed a new injury during a practice run in Turin.

"This injury prevents me from skating my best, and I've said all along that if I couldn't skate to the level that I expected from myself, I'd withdraw from the team," she said in announcing her decision, which allowed another team member to skate in her place.

Kwan's decision reflected her character, her sportsmanship, and her respect for her team. To those who'd traced her career, it came as no surprise. "The Olympics is the greatest sporting event in the world, and what's most important is that the United States fields the strongest team," she said in an earlier interview.

Kwan's chance for Olympic gold may have been dashed, but her spirit was not. Her fellow athletes, including 1988 Olympic gold medalist Brian Boitano, had always praised her spirit. "Michelle's a tiger underneath. She's a great fighter, a great competitor," he said.

That spirit emerged early. Born in 1980 in California to Chinese immigrant parents, Kwan started skating at age five. In 1992, she entered competition at the senior level. She started to win championships and, until Turin, she never stopped.

Michelle Kwan withdrew from Olympic competition with dignity. She put her team first. In so doing, she earned the respect of athletes and fans worldwide. Her agent, Shep Goldberg, summed it up: "Michelle's character, class, and integrity are what make her what she is, not the color of her medals."

Kwan herself said, "I've learned it's not about the gold. It's about the spirit of the Olympics... and if I don't win the gold, it's OK."

Michelle Kwan gave the world, in the words of one editor, "a legacy that glitters more than gold—a legacy of goodwill."

 **CHECKPOINTS**

Lesson 3 Review

Using complete sentences, answer the following questions on a sheet of paper.

1. What does a team vision do?
2. Whose job is it to fine-tune the vision, and why?
3. What does a team charter include?
4. What four elements should a team charter have?
5. What do team goals grow out of?
6. Why is a project timeline important?
7. What does an exceptional team do?
8. What four things can you do as a team leader to help your team work together?

APPLYING YOUR LEARNING

9. Why do you think it's important to encourage members of a team to work together to meet a common vision and achieve excellence?