



# Villa St. Benedict

## **Mission / Vision Retreat**

**November 4-5, 2005**

**Wyndham Lisle/Naperville  
Lisle, IL**

## ***PARTICIPANT WORKBOOK***

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# Mission / Vision Retreat

## PURPOSE & AGENDA

The purpose of our time together is to develop a clear mission, vision, and directional focus that will guide the operational phase of Villa St. Benedict for many years into the future.

### Friday Afternoon & Evening

- 11:45 AM Registration, Lunch and Social Interaction
- 1:00 PM Welcome, Introductions  
Opening Prayer and Reflection  
Overview of Purpose and Agenda for the Retreat  
Overview of BHS and BSSH Mission Statements and Core Values  
Discovering the Best of Villa St. Benedict
- 3:30 PM Break
- 3:45 PM Mapping Villa St. Benedict's Positive Core
- 5:00 PM Dinner
- 6:00 PM Population Shifts and Trends in Continuing Care (Dennis Bozzi)  
Envisioning the Future of Villa St. Benedict
- 8:30 PM Night Prayer and Adjourn

### Saturday Morning

- 7:30 AM Continental Breakfast
- 8:30 AM Morning Prayer and Reflection
- 8:45 AM Lifting Up a Compelling Vision & Mission for the New Villa St. Benedict (includes a 15 minute break)
- 12:30 PM Closing Prayer and Adjourn

## **Appreciative Inquiry: Framework for the Meeting**

*“Appreciative inquiry gets much better results than seeking out and solving problems. We concentrate enormous resources on correcting problems...[but] when used continually over a long time, this approach leads to a negative culture, a descent into a paralyzing sense of hopelessness. Don’t get me wrong. I’m not advocating mindless happy talk. Appreciative inquiry is a complex science designed to make things better. We can’t ignore problems—we just need to approach them from the other side.”*

**Thomas H. White, President, Telephone Operations, Verizon Wireless**

*“We introduced the concept of Appreciative Inquiry into our Breakthrough Leadership Program at Roadway curriculum in 2000. Our senior managers have been so enthusiastic...everyone is focused on what’s possible. The output has been amazing and provides a great map to desirable outcomes.”*

**Jim Staley, President & COO, Roadway Express, Inc.**

*“Appreciative Inquiry is currently revolutionizing the field of organization development...it is a process of search and discovery designed to value, prize and honor. It assumes that organizations are networks of relatedness and that these networks are ‘alive.’”*

**Robert Quinn, M. E. Tracy Distinguished Professor of Management,  
University of Michigan Business School, in *Change the World: How  
Ordinary People can Achieve Extraordinary Results***

*“Watch out Dilbert. Your view of corporations as hotbeds of meaningless work and chronic alienation may hold center stage for now, but an alternative view that finds the glass half full, not half empty, is gaining followers daily. Eventually it will replace your terminally cynical take on the world. One thing’s for sure: Dilbert’s method to search for and highlight the most hilariously counterproductive workplace behavior and the times when workers are most dispirited is nearly reversed through the method of Appreciative Inquiry.”*

**Eric Ramy, Human Resource Executive Magazine**

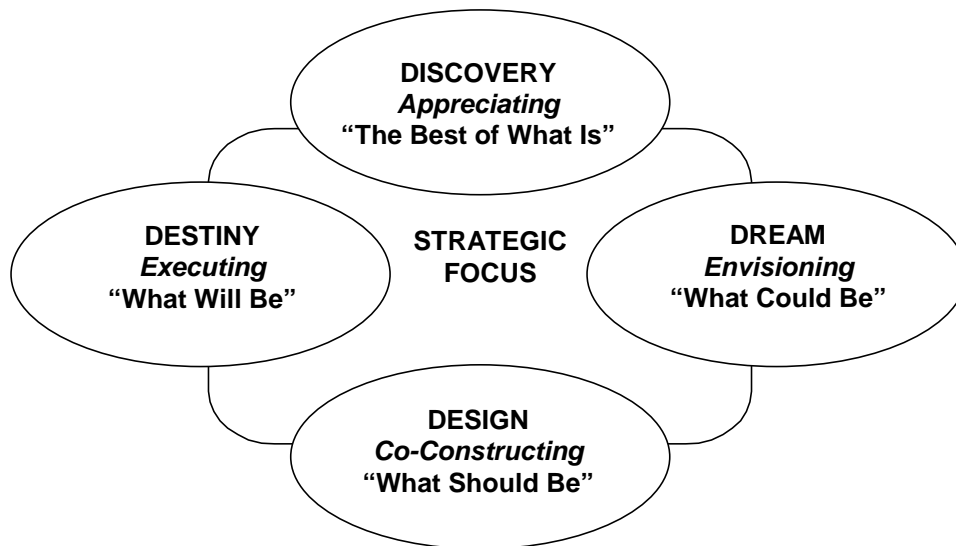
# What is Appreciative Inquiry?

Appreciative inquiry is an approach to organization change that has been used successfully in small and large change projects with hundreds of organizations worldwide. It is based on the simple idea that organizations move in the direction of what they ask questions about. For example, when groups study human problems and conflicts, they often find that both the number and severity of these problems grow. In the same way, when groups study high human ideals and achievements, such as peak experiences, best practices, and noble accomplishments, these phenomena, too, tend to flourish. Thus, appreciative inquiry distinguishes itself from other change methodologies by deliberately asking *positive questions* to ignite constructive dialogue and inspired action within organizations.

## How to Use Appreciative Inquiry

As a method of organizational intervention, appreciative inquiry differs from traditional problem-solving approaches. The basic assumption of problem-solving methodologies is that people and organizations are fundamentally “broken” and need to be fixed. The process usually involves: (1) identifying the key problems; (2) analyzing the root causes; (3) searching for possible solutions; and (4) developing an action plan.

In contrast, the underlying assumption of appreciative inquiry is that people and organizations are by nature full of assets, capabilities, resources, and strengths that are just waiting to be located, affirmed, stretched, and encouraged. The steps include: (1) discovering and valuing; (2) envisioning; (3) design through dialogue; and (4) co-constructing the future. In other words, the appreciative inquiry 4-D model includes discovery, dream, design, and destiny.



# What to Expect from this Retreat

## Role of Conference Leaders

- Introduce appreciative inquiry
- Set the structure and time frames
- Manage the overall conference flow

## Your Role

- Contribute your best ideas
- Lead with your energy and optimism
- Self-manage own group
- Focus on the future of what you want to create

## Ground Rules

- Everyone participates
- All ideas are valid
- Everything is written on flip charts
- Listen to each other
- Observe time frames
- Seek higher ground (differences acknowledged—not “worked”)
- Move to inspired action

## Group Leadership Roles

Each small group manages its own discussion, data, time, and reports. Here are useful roles for self-managing this work. **Leadership roles can be rotated.**

Divide up the work as you wish:

- **DISCUSSION LEADER**—Assures that each person who wants to speak is heard within time available. Keeps group on track to finish on time.
- **TIMEKEEPER**—Keeps group aware of time left. Monitors report-outs and signals time remaining to person talking.
- **RECORDER**—Writes group’s output on flip charts, using speaker’s words. Asks people to restate long ideas briefly.
- **REPORTER**—Delivers report to large group in time allotted.

## **Activity #1: Task Brief**

### **Discovering the Best of Villa St. Benedict**

#### ***One-on-One Interviews***

**Purpose:** To explore the forces and factors that “give life” to Villa St. Benedict when it is at its best

**Guidelines:**

- Select an interview partner from your table group.
- Interview your partner using the interview guide on the following pages. Each person will have 40 minutes to interview his or her partner.
- Encourage your partner to tell his/her story, draw them out with your positive energy and excitement.
- Take good notes and be listening for great quotes and stories. You will share the results of your interview in the next session.
- The information you collect in this interview will be used today and tomorrow to shape the future of Villa St. Benedict.



## ***Opening Interview Guide***

### **1. What Attracted You?**

Think back to when you first got involved with Villa St. Benedict, what attracted you? What were your initial excitements and impressions?

### **2. High Point Experience**

During your relationship with Villa St. Benedict, I'm sure you've had some ups and downs, some peaks and valleys, some high points and low points. I'd like you to reflect for a moment on a high point experience, a time when you felt most alive, most engaged, most proud of your involvement...tell the story. What happened? What made the experience exceptional?

### **3. Root Causes of Success**

As you reflect on your high point, I'd like to you identify some of the "root causes" that contributed to making it a peak experience.

- a. First, what was it about *you* that made it a great experience? If we had a conversation with the people who know you best and asked them, "*What are the 3 best leadership qualities they value in you, qualities or capabilities that you bring to Villa St. Benedict and the building of its future—what would they say?*"

- b. Second, who were significant others and what was it about *them* that made it a high point?
  
- c. Third, what was it about the nature of your work...the things you most value...that made it that made it a great experience?
  
- d. Finally, what was it about Villa St. Benedict as an organization (e.g., culture, values, relationships, leadership, systems, ways of working, etc.) that made it a high point for you?

#### 4. Core Life-Giving Factor

Based on the last three questions, if you could boil it down to one thing, what would you say is *the* core factor that gives life, health, and vitality to Villa St. Benedict?

#### 5. Leadership in Continuing Care

As you think today about the larger *context and purpose* of Villa St. Benedict, there are many trends, events, and developments that will call on Villa St. Benedict (like any high purpose organization) to change, develop, and play an even more significant role in the future.

- A. In your view, what are the two or three most important **events, trends, and developments** affecting Villa St. Benedict today (e.g., world events; market trends; advances in science or your profession; new products, services, or business strategies; shifting needs and expectations of your customers or other core constituencies)?

- B. What do these trends imply for the future of Villa St. Benedict – its larger purpose and future opportunities to grow, change, aim higher, and ***lead in new ways?***

**6. Images of the Future**

Imagine that tonight you fall into a deep relaxing sleep, and you don't wake up until the year 2010. When you awake, you see that a miracle has occurred. Major changes have taken place, and Villa St. Benedict has become everything you hoped it could be. You can truly say, without reservation, that this *is* the organization of your dreams. What do you see? What does it look like? What's going on at Villa St. Benedict? What's happening that's new and different? What are Villa St. Benedict's culture and distinguishing characteristics? What is its reputation in the broader community? In what ways is it leading in the field of senior living? What do you see in terms of purpose, values, systems, people, ways of working, fiscal performance, others?

**7. How Do We Get From Here to There?**

If you could develop or transform Villa St. Benedict in any way, what three wishes, in order of priority, would you make to heighten its overall health and vitality?

## **Activity #2: Task Brief**

### **Mapping Villa St. Benedict's "Positive Core"**

**Purpose:** To develop a shared understanding of the "positive core of strengths" that gives life and vitality to Villa St. Benedict when it's at its best.

**Guidelines:**

1. Assign a discussion leader, timekeeper, recorder, and reporter (see p. 5).
2. Go around the table. Have each person introduce his or her partner by sharing a story and brief highlights from **questions 1 & 6**.
3. Next, go around the table and have each person share stories and highlights from interview **questions 2-4**. Focus especially on the high point experience stories and their "root causes of success." Recorder: try the "narrative analysis" approach.
4. As a group, talk about what these stories and responses tell you about Villa St. Benedict at its best? What are the elements of Villa St. Benedict's "positive core of strengths" that enable it to be a leader in continuing care?
5. Prepare a 3-5 minute presentation that includes:
  - A story from the interviews that powerfully illustrates the "positive core" of Villa St. Benedict when it is at its best.
  - Graphic illustrations of the 3-5 most important elements of Villa St. Benedict's positive core of strengths.

## Individual Worksheet

### Villa St. Benedict's "Positive Core of Strengths"

As you listen to the presentations, jot down those things that you hear that you consider to be so central to the mission and purpose of Villa St. Benedict that they ***must be sustained and nurtured***, no matter what else changes, as Villa St. Benedict moves boldly into the future. You will be asked to revisit these ideas tonight and tomorrow as we work on Villa St. Benedict's mission, vision, and organizational priorities.

**Individual Worksheet**

**Population Shifts and Trends in Continuing Care (Dennis Bozzi)**

Notes:

### **Activity #3: Task Brief**

#### **Envisioning the Future of Villa St. Benedict**

**Purpose:** To imagine a future for Villa St. Benedict toward which you want to work.

**Guidelines:**

1. Assign a discussion leader, timekeeper, recorder, and reporter.
2. At your tables, have each person share stories and highlights from interview **questions 5 & 6**.
3. As a group, put yourselves in the year 2010. Visualize Villa St. Benedict the way you really want it in order to be the leader in continuing care in the Chicago marketplace. Imagine it as if it exists today. What is it like? As you create your image of the future, consider some of the following areas:
  - The organization's purpose
  - Most exciting and promising strategies and directions being pursued
  - Image and reputation
  - Positive impact and results
  - Nature of leadership—visionary, empowering, servant, and so on
  - Organizational culture, quality of work life
  - Nature of external relations between Villa St. Benedict and others
  - Organizational practices and structures creating a culture of excellence
  - Change readiness and methods for increasing change capacity
  - Collaboration and teamwork at all levels
  - Ways of attracting and retaining top talent
  - Decision-making and planning processes
  - HR (e.g., performance appraisal) practices
  - Uses of technology, networks, e-learning, and sharing of information
  - Excellence in training, learning, and development
  - Communications practices
  - Other desirable features
4. Spend enough time talking as a group to imagine fully Villa St. Benedict of the future. This is an exercise in bold dreaming—of the kind of organization you want to work toward.
5. List on a flipchart the key elements of your collective dream.

## Individual Worksheet

### **The Future of Villa St. Benedict: Promising Ideas and Directions**

As you listen to the dream presentations, jot down those things that you hear that you consider ***particularly promising*** for the future of Villa St. Benedict. List key images, words, phrases, and “quotable quotes” that should be in our mission and vision statements *and* specific high-leverage opportunities, priorities, projects and directions that will allow us to translate vision into reality. You will be asked to revisit these ideas tomorrow as we continue to work on Villa St. Benedict’s mission, vision, and organizational priorities.

<u>Images, Words, Phrases, “Quotable Quotes”</u>	<u>Opportunities, Priorities, Projects, Directions</u>

## **Activity #4a: Task Brief**

### **Crafting Mission Statements**

**Purpose:** *To create a mission statement that paints a clear and compelling picture of why Villa St. Benedict exists*

#### **A Word About Mission Statements:**

The creation of a clear mission statement is the single most important step you can take in the entire planning process. It serves as a foundation for all major decisions that you, your Board, and your management team will make. A mission statement differs from a vision statement in that it is more comprehensive, encompassing the following major elements:

- The purpose of your organization (the reason you exist)
- The nature of your business
- The concept of your organization (what is unique and distinctive)
- The people you serve
- The principles and values under which you intend to operate

The principal application of the mission statement is as an internal guide for all major decision makers within your organization, so that any plans that are developed can be tested for compatibility with your organization's mission.

#### **Guidelines:**

1. Select a discussion leader, timekeeper, recorder, and reporter.
2. At your table, review the example mission statements below to create a shared sense of what your end product might look like.
3. Discuss/brainstorm the "ingredients" you would like to see present in the ideal version of Villa St. Benedict's mission statement. Recorder: make sure to put these up on the flip chart for everyone to see.
4. As a group, create on your flipchart a "messy" and inclusive first-draft mission statement. Discuss and refine it (remember the "agreement principle").
5. Finalize your mission statement by printing a neat version on a single flipchart page.
6. Be prepared to report out (**three minutes max.**).

## **Activity #4b: Task Brief**

### **Crafting Vision Statements**

**Purpose:** *To create a vision statement that offers an inspiring image of what Villa St. Benedict aspires to become*

#### **A Word About Vision Statements:**

A vision statement is a short, compelling statement of how you want to be seen by your customers, employees, owners, community, and other important stakeholders. It should lift up an inspirational image of what you want your organization to become in the near and long-term future. Well-stated vision statements should be:

- Brief (preferably under ten words)
- Catchy and easy to remember
- Inspiring and a challenge to future achievement
- Consistent with your core values and mission
- Clearly states the essence of what your organization must become
- Allows for flexibility and creativity in execution

The principal purpose of a vision statement is to inspire and motivate those with a vested interest in the organization's future.

#### **Guidelines:**

1. Select a discussion leader, timekeeper, recorder, and reporter.
2. At your table, review the example vision statements below to create a shared sense of what your end product might look like.
3. Discuss/brainstorm the "ingredients" you would like to see present in the ideal version of Villa St. Benedict's vision statement. Recorder: make sure to put these up on the flip chart for everyone to see.
4. As a group, create on your flipchart a "messy" and inclusive first-draft vision statement. Discuss and refine it (remember the "agreement principle").
5. Finalize your vision statement by printing a neat version on a single flipchart page.
6. Be prepared to report out (**three minutes max.**).

## Sample Mission and Vision Statements

### **Benedictine University**

**Motto:** “Informing Today – Transforming Tomorrow”

**Mission:** Benedictine University is dedicated to the education of undergraduate and graduate students from diverse ethnic, racial and religious backgrounds. As an academic community committed to liberal arts and professional education distinguished and guided by our Roman Catholic tradition and Benedictine heritage, we prepare our students for a lifetime as active, informed and responsible citizens and leaders in the world community.

**Vision:** Benedictine University is a Catholic University in the Benedictine Tradition that Provides a Values-Centered Liberal Arts Education Enriched by Our Excellence in Science.

### **Southwest Airlines**

**Motto:** “You are now free to move about the country”

**Mission:** The mission of Southwest Airlines is dedication to the highest quality of Customer Service delivered with a sense of warmth, friendliness, individual pride, and Company Spirit.

### **UPS**

**Motto:** “What can Brown do for you?”

**Purpose:** We enable global commerce.

**Mission:** We fulfill our promise to our constituents throughout the world in the following ways:

- We serve the evolving distribution, logistics, and commerce needs of our customers worldwide, offering excellence and value in all we do.
- We sustain a financially strong company, with broad employee ownership, that provides a long-term competitive return to our shareowners.
- We strive to be a responsible and well-regarded employer by providing our people with an impartial, rewarding, and cooperative environment with the opportunity for advancement.
- We build on our legacy as a caring and responsible corporate citizen through the conduct of our people and company in the communities we serve.

## **BP**

**Motto:** "Beyond Petroleum"

**Mission:** BP is one of the world's largest energy companies, providing its customers with fuel for transportation, energy for heat and light, retail services and petrochemicals products for everyday items. Our business is about finding, producing and marketing the natural energy resources on which the modern world depends.

**Brand Promise:** Our products and services contribute to a better quality of life. They provide the freedom to move, to heat, to see. We believe this freedom is inseparable from the responsibility to produce and consume energy in ways that respect both human rights and the natural environment.

Maintaining this balance is our lifeblood, but we cannot do it alone. Where others see contradiction and conflict, we see opportunities for mutual progress. Where others are complacent, we see potential for improvement. Where others look inward, we seek constructive engagement with customers, governments, communities and our own people.

We will be the magnet for people with new ideas, delivering a performance standard that challenges the world's best companies.

## **University of Chicago Hospitals**

**Motto:** "At the forefront of medicine"

**Mission:** Our mission is to provide superior healthcare in a compassionate manner, ever mindful of each patient's dignity and individuality.

**Vision:** We are committed to making discoveries that will change the face of medicine, all the while training our outstanding future physicians and researchers, and providing superior patient care.

## **GE**

**Motto:** "Imagination at Work"

**Mission:** We are a diversified technology, media and financial services company focused on solving some of the world's toughest problems. With products and services ranging from aircraft engines, power generation, water processing and security technology to medical imaging, business and consumer financing, media content and advanced materials, GE serves customers in more than 100 countries and employs more than 300,000 people worldwide.

VALUES

CURIOUS  
PASSIONATE

RESOURCEFUL  
ACCOUNTABLE

TEAMWORK  
COMMITTED

OPEN  
ENERGIZING



imagination at work

ACTIONS



We put imagination to work for our customers, people and communities



We help solve some of the world's toughest problems

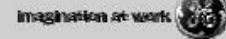


We are a performance culture that builds markets, people and shareholder value



We are a meritocracy that leads through learning, inclusiveness and change

ALWAYS WITH UNYIELDING INTEGRITY



## **Activity #5: Task Brief**

### **Identifying High-Leverage Strategic Priorities**

#### ***Moving From Aspiration to Action***

**Purpose:** To begin to build the future you want for Villa St. Benedict

**Guidelines:**

1. Select a discussion leader, timekeeper, recorder, and reporter.
2. From all the presentations about the future, the mission statements, the vision statements, and your own thoughts and wishes, brainstorm a list of high-leverage strategic priorities for Villa St. Benedict – those with the most potential to quickly advance Villa St. Benedict’s position as *the* leader in continuing care.

*[These change ideas can include developing new markets, sources of funding, launching new training, new organizational linkages/networks, new or improved products or services, policies, procedures, practices. etc.]*

3. As a group, choose the 3-5 top priorities you believe will have the greatest impact on the positive future of Villa St. Benedict. Write them on a flipchart page and prepare to report out.