

VISION Alignment Worksheet

Vision Crafting and Alignment

This worksheet will guide you through crafting a compelling vision and aligning your credit union to it. Use these steps to define, refine, and inspire a shared sense of purpose within your organization.

Part 1: Understanding Vision

What is your credit union's current vision statement?

In one sentence, how would you describe your vision for the future?

Why is this vision important for your team and members?

What core values does your vision connect to?

Part 2: Rate the following elements of your vision (1 = Needs Work, 5 = Strong):

CLARITY

Is it specific and easy to understand?

AMBITION

Does it inspire action and reflect bold goals?

ALIGNMENT

Does it connect with the deeper purpose of your team?

STORYTELLING

Can you express it through engaging stories or metaphors?

Craft Your Vision Statement

Draft or revise your vision statement incorporating the elements above.

Part 3: Aligning Staff and Members

How does your team currently perceive the vision?

What feedback have you received from staff about the vision?

Action Plan for Alignment: List three actionable steps you can take to better align your team with the vision.

Part 4: Sharing and Feedback

Sharing the Vision: Identify three creative ways to communicate your vision to your team (e.g., storytelling sessions, vision boards, role-play activities).

Feedback Loop: How will you gather and incorporate feedback to refine your vision over time?