



# Statement of Shared Purpose:

*Overview, Guidelines, and Exercises*

*“Collaboration is working together to create something new in support of a shared vision. The key points are that is [sic] is not an individual effort, something new is created, and that the glue is the shared vision.”*

~ Jesse Lyn Stoner

## Overview

Drafting the statement of purpose is an important first step in developing a sustainable collaboration. It will help identify the shared (or intersecting) goals that justify inter-institutional collaboration.

The statement of purpose has many uses:

- It clarifies the current situation by specifically identifying the issue or opportunity at hand.
- It clarifies the urgency, time-sensitivity, and/or financial impact associated with the issue or opportunity.
- It provides a vehicle to ensure that all stakeholders agree on the opportunity on the table.

Such a statement is a useful communication tool. It will serve to secure buy-in and support from others and develop sponsorship and champions.

Well-written statements help people – stakeholders, partners, and funders – readily grasp and understand what you and your colleagues are working to accomplish and communicate the opportunity to other interested parties.



## General Guidelines

Initial meetings and tools used need to identify stakeholder alignment and agreement:

Identifying the shared (or intersecting) goals that justify inter-institutional cooperation to achieve a shared goal “in support of a shared vision.”

Well-written statements help people – stakeholders, partners, and funders – readily grasp and understand what you and your colleagues are working to accomplish and communicate the opportunity to other interested parties.

A statement of purpose should be concise and include the following:

- A brief description of the opportunity or issue and the metric used to describe it
- Where the issue or opportunity is observed e.g., department, institutions, and/or processes.
- The time frame over which the opportunity has been observed
- The anticipated scope or magnitude of the opportunity

Never attempt to start in on the solution or the plan at this stage. The statement of purpose should not include any indication or speculation about actions to be taken to address the opportunity or problem. Avoid leaping to solutions and plans before adequately articulating the issue. Save that for your planning documents.

Write the statement with your known audience(s) in mind. Keep in mind that you probably have to make a case to others to secure resources (funding, staff, infrastructure) to address the issue as well as identify and recruit team members to assist you. The statement is a tool for you to use to ensure that you won't need to spend precious time explaining over and over what you're trying to accomplish.

Avoid under-writing a statement of purpose. A natural tendency is to write a statement too simplistically because you're already familiar with the problem or opportunity. If you're going to recruit support and resources to solve your problem, others have to understand the context and the significance to them in order to support you.



## Planning Exercises

### Review Questions:

- *Have the stakeholders agreed there is a shared goal that needs attention?*
- *Have stakeholders agreed on the definition of the issue?*
- *Have stakeholders agreed to work together on the problem/issue?*

### Developing the Statement of Purpose

The statement of purpose has many uses. It is one of the tools to get you to “Yes” in the questions above. Significantly, it clarifies the current situation by specifically identifying the problem or opportunity as well as the urgency, time-sensitivity, and/or financial impact associated with it. Such a statement is a useful communication tool. It will serve to get buy-in and support from others and develop sponsors and champions. Well-written statements help people – stakeholders, partners, and funders – readily grasp and understand what you’re trying to accomplish.

Do not imply a solution in the problem statement. Significantly, the problem statement must not include any indication or speculation about the cause of the problem or what actions will be taken to solve the problem. Never attempt to solve the problem or steer the solution at this stage.

Below are suggested steps to write a statement of purpose that describes the opportunity or issue to be addressed and paves the way to illustrate the shared goals of the potential collaborators.



**Exercise 1:** Identify the scenario that brought everyone to the table.

*“How did we get here? What is the scenario that led the participants to be here at the table today?”*

**Goal:** Identify the various perspectives on the opportunity. What do the stakeholders think of this opportunity. Discourage parroting the “official version” - if any - of the issue at hand. Suggest going “old school” having each individual begin by using pen and paper in the room as a group to complete these exercises. Make sure that participants address all the following points:

- Location: where is the situation occurring, e.g., in or among academic departments, between Library and IT, or IT and disciplines, or between institutions.
- Timeframe: When did this opportunity arise and has it been persistent from the start? (Is there a “durability” to this opportunity?)
- Magnitude: How broad (or narrow) is the scope of the opportunity?
- Urgency: Is this urgent? What will be lost because of inaction? What will be gained by an expeditious approach?
- Cost: Define the cost of the opportunity if implemented, e.g., money, resources, time, etc. (positive cost and negative cost) and the cost of inaction, e.g., loss of strategic opportunity, revenue, external funding from grants, potential partnerships

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**Scenario Statement:**

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**Exercise 2:** Identify the stakeholders who are impacted (positively and negatively) by the opportunity at hand.

*“In your experience, who is most impacted by this issue? What is your role and responsibility relative to these stakeholders?”*

**Goal:** Make explicit of the key organizational lenses through which those affected are perceived. Identifying and explicating the lenses provides a way to look at the organizational relationships to identify partnerships as well as challenges.

- Who is most directly impacted by this scenario?
- What are their roles?
- How widespread is the impact of this issue?
- Who are the farthest from the problem but still affected to some degree by it?
- Alternately, who would benefit the most if the scenario were developed and implemented?

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**Stakeholders Statement:**

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**Exercise 3:** Identify and define the nature and attributes (positive and negative) of the scenario/opportunity.

*“Environmental scan” - avoid routine conceptual buckets: describe the nature and environment of the attributes of the issue.*

**Goal:** to help participants enumerate attributes and to articulate the linkage between these and the description of how we got here (Exercise 1). Here are some Examples: In a general way, what type of opportunity is this? There are a number of common types, as follows: (many problems will overlap these categories.)

*Champions* = presence or absence of key and active supporters helped bring about the issue

*Inclusion or Exclusion* = presence or absence of appropriate stakeholders or personnel helped bring about the issue, and/or the inclusion of inappropriate or ineffective personnel or stakeholders

*Appropriate skills or knowledge* = presence or absence of technical, organizational or other required abilities helped bring about the issue

*Sufficient resources* = presence or absence of sufficient funding, physical plant, or other material required helped bring about the issue

*Transparency* = presence or absence of proper knowledge, data or metrics, or understanding of what was occurring helped to bring about the issue or to conceal the depth of the issue

*Sustainability* = presence or absence of programmatic, planned structure to reach and maintain sustainability.

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**Attributes Statement:**

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**Exercise 4:** Goal for improvement and long-term impact

A general description of the goal you wish to achieve.

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**Goals Statement:**

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**Exercise 5: Summary statement**

Tie the above statements into 3–5 coherent sentences that could be easily understood by a wide range of stakeholders.

- Statement 1: Restatement of the initial scenario that launched this inquiry process.
- Statement 2: Identifying the stakeholders affected by the scenario.
- Statement 3: Describing the nature and attributes of the scenario.
- Statement 4: A general description of the goal for improvement and long-term impact.
- Statement 5: Summary statement distills the exercises.

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**Summary Statement:**

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