

FACTSHEET – VISION, MISSION & VALUES & REVIEWING WHERE YOU ARE NOW

The following exercises are the first step to developing a plan for your organisation. In these exercises the aim is to have clarity on your organisation's vision, mission and values, and to develop an understanding of what you have achieved to date, your strengths, weaknesses and external influencing factors impacting on your organisation. This is laying the groundwork for developing a social business plan.

Why do you need one?

A business plan ensures that an organisation has clear goals which everybody understands and can work towards. It also provides vital information for funders and other partners and stakeholders wanting to better understand your organisation, its aims and the methods by which those aims will be achieved.

Step 1: Articulate your vision, mission and values

This activity is designed for social entrepreneurs, but it is helpful for any group trying to achieve a social aim. Consider your vision, mission and values. This gives you clarity on your 'why?', what you hope to achieve and how.

Your Values

- *What values are most important to you? (e.g. honesty, openness, creativity, kindness)*
- *Pick 5-6 that particularly resonate and consider how you put your values into action in how your organisation works*

Your Vision Statement

- *This is your 'dream' of what the world will be like when the problem you are addressing is solved*
- *This can be aspirational but it should be the motivating inspiration that drives you forwards*

Your Social Mission Statement

- *This is how you are going to achieve that change*
- *It's what you are going to actually do through your business and activities*
- *This is a statement – it should be concise (1-2 sentences)*

Tips for creating a mission statement:

- *What is your organisation's name?*
- *What do you intend to do through your work?*



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- *Who is the target audience?*
- *Is it location specific (e.g. Bury, Greater Manchester, North West)*
- *What will it achieve – what difference are you hoping to make for people*
- *How might you work in your key values into this mission statement sentence?*

Step 2: Reviewing where you are now – SWOT & PESTLE

Review what your organisation has done to date to fulfil its social mission. What are the achievements and what have been the challenges?

Common methods to help organisations do this are to carry out a **SWOT** analysis of your strengths, weaknesses, opportunities and threats:

<p>STRENGTHS</p> <ul style="list-style-type: none"> • Internal attributes that give your organisation its edge. What are you good at? 	<p>WEAKNESSES</p> <ul style="list-style-type: none"> • What hinders your performance?
<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> • External factors you can leverage to advance your mission 	<p>THREATS</p> <ul style="list-style-type: none"> • External factors that could jeopardise your chances of success

Another way of thinking through what the **external factors** are that may impact on your organisation is to do a **PESTLE** analysis:

Political – e.g. outcome of local or national elections

Economic – e.g. cost of living pressures

Social-cultural – e.g. particular lifestyle trend

Technological – e.g. smartphones

Legal – e.g. changes in the law impacting on your organisation

Environmental – e.g. shifting weather patterns, local pollution levels

Information can be gathered from a number of sources, including service users, staff and volunteers. Aim for a mix of data, including **quantitative** (numerical or 'hard' data), as well as **qualitative** ('soft' data including people's experiences and feedback). Look at any current services that you offer and how these are being managed and processed currently. How do you currently measure success as an organisation?

Start to think how you will respond to the issues raised in your review and the changes that may be needed. This initial review is important and should help you to make a considered and realistic plan for the future.

For support with your planning, including template SWOT and PESTLE analysis docs, please contact fundinganddevelopment@buryvcfa.org.uk



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