

**DEVELOPMENT TRUSTS
ASSOCIATION SCOTLAND**

Vision, Mission and Values Toolkit

January 2025



**Development
Trusts Association
Scotland**

A Thriving Community-led Network



**DEMOCRATIC
FINANCE
SCOTLAND**

Transforming community wealth



**Community
Ownership
Support Service**

Development Trusts Association Scotland

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Introduction

The Ultimate Organisational Strategy Toolkit

A Step-by-Step Guide to Crafting Your Vision, Mission, Values, and Strategic Goals

This toolkit is designed to help organisations define their Vision, Mission, Values, and Strategic Goals. It includes practical advice, templates, and examples to ensure you have everything needed to create a powerful strategy for your organisation's future.

There are some wellbeing focused questions and points to consider throughout this toolkit. They are highlighted in yellow. These statements invite you to think about your vision, mission, values and strategic goals from a workplace wellbeing lens. This allows you to understand the impact of your goals on your organisation's internal resources and the capacity of your board members, staff or volunteers.

How to Use This Toolkit

- Work through each section step-by-step, completing the activities designed to help you reflect on and define your organisation's strategy.
 - Use the examples and templates provided to structure your responses.
 - Review and revise your statements with your team to ensure they align with your organisation's identity and goals.
- Ensure each role within your existing board, staff, and volunteer teams fits within your overall identity.
 - Consider how you will deliver and communicate your overall identity to your teams and your community.
 - Evaluate the capacity of your existing teams. Do you need more resources to deliver your goals?

We recommend that you complete this toolkit as a team.



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Included In This Toolkit

- Customisable templates for Vision, Mission, Values, and Strategic Objectives
 - Reflective prompts to guide decision-making
 - Practical examples for inspiration
 - Checklists to ensure completeness
 - Evaluation tools to assess the clarity and strength of your strategy
-

Why are Vision, Mission and Values important?

Using Vision, Mission and Values in your branding and communications.

- Giving members of your community and the general public a clearer picture of what you do and why you do it.

Using Vision, Mission and Values for funding.

- Giving funders reassurance that you know who you are and where you are going and allowing them to see “at a glance” if you fit within their priorities or not.

Using Vision, Mission and Values for strategy and governance.

- Giving your board members a clear sense of direction, ensuring new board members join the organisation agreeing with its objectives and expected conduct.

Using Vision, Mission and Values for the future of your organisation.

- Helping you decide which projects to prioritise, and which ones you should not undertake.

Vision Development

What is a Vision Statement?

Your vision statement articulates your organisation's ultimate dream and establishes its purpose. A strong vision:

- Is understood and shared by all members
- Includes diverse perspectives
- Inspires everyone involved
- Is concise and easy to communicate

Step 1: Vision Exercise

Use this exercise to define your organisation's long-term aspirations:

1. What does your organisation aim to achieve?

(Example: To create a world where all communities have access to sustainable resources and equitable opportunities.)

Your Answer:

2. What impact will your work have in your community?

Your Answer:

Vision Development

Step 2: Vision Statement Template

Use this template to write your organisation's vision statement. Adjust the wording as needed to reflect your unique goals.

If you already have a vision statement, reflect on whether it is still relevant for the current direction of your organisation.

Vision Statement Template

"Our vision is to [outcome] by [how]. We aim to create a future where [impact on community, sector, or society]."

Your Vision Statement:

Step 3: Vision Statement Checklist

Use this checklist to evaluate your vision statement:

- ☐ Is the statement clear and easy to understand?
- ☐ Does it reflect the ultimate goal of your organisation?
- ☐ Is it inspiring to members, stakeholders, and the broader community?
- ☐ Can it be easily communicated (e.g., short enough to fit on a T-shirt)?
- ☐ Do your teams see their roles reflected in it?



Mission Development

What is a Mission Statement?

A mission statement anchors your vision by explaining what you do and how you do it. It should:

- Be concise (one or two sentences)
- Focus on outcomes
- Be inclusive enough to allow flexibility in your organisation's operations

Step 1: Mission Exercise

If you already have a mission statement, reflect on whether it is still relevant for the current direction of your organisation.

1. What does your organisation do to achieve its vision?

(Example: We provide mentorship and training to young entrepreneurs in underserved communities.)

Your Answer:

2. How do you achieve this?

Your Answer:



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Mission Development

3. Do you have the resource internally to achieve this? What would the impact be on your teams? Would there be any changes to their roles? What kind of support would they need to achieve this?

Your Answer:

4. Why is this important to your community or stakeholders?

Your Answer:



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Mission Development

Step 2: Mission Statement Template

Use this template to write your organisation's mission statement. Adjust the wording as needed to reflect your unique goals.

If you already have a mission statement, reflect on whether it is still relevant for your current organisational direction.

Mission Statement Template

"Our mission is to [action] to [purpose or outcome]."

Your Mission Statement:

Step 3: Mission Statement Checklist

Use this checklist to evaluate your mission statement:

- ☐ Does the mission statement explain what you do and why?
 - ☐ Is it clear and concise (one or two sentences)?
 - ☐ Does it reflect the values and aspirations of your organisation?
-



Values Development

What are values?

Organisational values are the guiding principles that define what is most important to your organisation and influence its decisions, culture, and interactions with the community. These values should align with your mission and vision, serving as the foundation for your organisational identity.

Why are values linked to wellbeing?

Having values can build capacity.

- Assessing whether your work is being delivered in accordance with your values ensures that you don't overdeliver on non-essential projects.

Having values can show transparency.

- Sharing your values internally and with the wider community shows that you are committed to delivering your work in line with your organisational strategy. It can mean that you're all on the same page about the direction of the organisation and its priorities.

Having values can allow for constructive feedback.

- If you aren't delivering your work based on your values, it can allow for constructive feedback. This holds the organisation accountable and allows for redirection. Be clear on your response to and process for addressing constructive feedback and establish good communication channels.

Having values can provide purpose.

- Sharing your values and organisational direction internally can allow individuals to see how they fit into the organisation and what their impact is.

Having values can enable you to be united.

- Having clear and agreed values provides the whole organisation with a shared vision, allowing you to deliver your work as a collective.



Values Development

Step 1: Values Exercise

This exercise is designed to help your organisation identify its core values by reflecting on what matters most to both the organisation and its community.

1. What is important to your organisation?

List as many principles as you feel reflect your organisation's core identity and priorities. Aim for at least 10.

Examples: Innovation, Sustainability, Integrity.

2. What is important to your community?

List as many principles as you feel represent the values and priorities of your community or stakeholders. Aim for at least 10.

Examples: Accessibility, Equity, Collaboration.



Values Development

3. Reflection on hidden values?

If all these values were upheld, is there anything that could still challenge our mission or community relationships?

Add any additional values that arise from this reflection.



Values Development

Step 2: Prioritising Values

Working as a team, complete the following prioritisation tasks.

1. Rank the Values:

- Using the combined list from Step 1, rank each value in order of importance to your organisation (1 = most important, 30 = least important).

2. Select the Core Values:

- Narrow the list by focusing on the top five values that best represent your organisation's culture and aspirations.
-



Values Development

Step 2: Core Values Template

Complete the table below to articulate your organisation's core values and how they are applied in practice:

Value 1:

Value 2:

Value 3:

Value 4:

Value 5:



Values Development

Step 4: Values Evaluation Checklist

Use this checklist to ensure the selected values are well-aligned with your organisation's goals and practices:

- ☐ Are these values shared by everyone in your organisation?
- ☐ Do these values guide decision-making and behaviour?
- ☐ Are they included in your organisation's policies or governance?
- ☐ Can you measure whether these values are reflected in your actions and culture?
- ☐ What tools could you use to measure whether these values truly reflect how you operate?



Mapping your Projects and Identifying Themes

Before defining your organisation's strategic pillars, it is essential to map out all the projects your organisation is currently delivering. This step allows you to explore which themes these projects align with and the outcomes you expect to achieve. Use this as an exercise to freely capture your current work - this will help guide your strategic planning process later.

Why Map Your Projects?

Clarity

- Understanding what projects your organisation is currently delivering helps clarify your overall focus.

Strategic Alignment

- By identifying the themes your projects fit under, you can determine the key areas that will form the basis of your organisation's strategy.

Foundation for Decision-Making

- Mapping your projects helps you see where your efforts and resources are currently concentrated, providing a foundation for future strategic decisions.

Steps to Map Your Projects and Identify Themes

List All Current Projects

- Begin by listing every project and initiative your organisation is currently delivering, including ongoing, completed, or planned projects.

Identify Themes for Each Project

- For each project, identify the overarching theme(s) it addresses. Projects might align with themes such as Community Engagement, Organisational Capacity Building, or Sustainability.

Determine Expected Outcomes

- Consider the outcomes you expect to achieve through each project. These could be general goals such as increased community participation, enhanced organisational capacity, or improved financial stability.

On the next page you can find an example project mapping table as well as a mapping table to complete for your own organisation.



Example Project Mapping Table

Project Name	Description	Theme(s)	Expected Outcome(s)
Community Outreach	Engaging local communities in sustainability efforts	Community Engagement	Increased participation in local sustainability projects
Financial Literacy Workshops	Providing financial education for low-income families	Financial Sustainability	Improved financial stability for families

Blank Project Mapping Table

Work with your team to list all your current projects, then freely identify the themes they relate to and note the expected outcomes you aim to achieve.

Project Name	Description	Theme(s)	Expected Outcome(s)



Blank Project Mapping Table Continued

Project Name	Description	Theme(s)	Expected Outcome(s)



Defining your Strategic Themes

Now that you have mapped your projects and identified the themes they align with, it's time to define your organisation's strategic themes. These themes represent the core areas of focus that will guide your organisation's direction over the next few years. They should reflect the common threads you've observed across your current projects.

Why Define Strategic Themes?

Focus and Clarity

- Strategic themes help clarify your organisation's focus by grouping similar areas of work together.

Strategic Direction

- Defining themes provides a clear direction for future decisions, ensuring your organisation remains aligned with its mission and vision.

Resource Allocation

- By identifying key themes, you can more effectively allocate resources, ensuring that efforts are directed where they are most needed.

Steps to Define Your Strategic Themes

Review the Common Themes Identified

- Look back at the themes you identified in the previous section. Are there common themes across multiple projects? Consider which themes are consistently reflected in your current work.

Group and Refine the Themes

- Group similar themes together and refine them to ensure they represent broad strategic areas. For example, if several projects focus on community involvement, you might consolidate these into a theme around Community Engagement. This will help simplify and clarify your focus areas.

Prioritise the Key Themes

- Prioritise the themes based on their importance to your organisation's success. Aim to define 3-5 key strategic themes that will form the foundation of your organisation's strategy going forward.

On the next page you can find an example project mapping table as well as a mapping table to complete for your own organisation.

Example Strategic Themes Table

Strategic Theme	Description
Community Engagement	Building strong relationships with the community to increase involvement and participation in our initiatives.
Organisational Capacity	Enhancing the capacity of the organisation through staff development, training, and improving internal systems.
Financial Sustainability	Ensuring long-term financial health by diversifying funding streams and increasing financial efficiency.

Blank Strategic Themes Table

Using the themes identified during the project mapping exercise, create your organisation's strategic themes. Group the common themes and refine them into clear, broad focus areas.

Strategic Theme	Description



Blank Strategic Themes Table Continued

Project Name	Description



Strategic Aims

What are Strategic Aims?

Once your organisation has agreed upon its key strategic themes, the next step is to define strategic aims that apply to the entire organisation.

- Strategic aims are the broad outcomes your organisation wants to achieve over the next few years, based on the key strategic themes.

Step 1: Strategic Aims Exercise

Now that your organisation has agreed on its key strategic themes, it's time to develop strategic aims that align with these themes. Strategic aims are the broad, high-level outcomes that will guide your organisation's progress toward its vision.

Questions to consider:

1. What broad aim is the organisation hoping to achieve based on the strategic themes?

(Example: Increase community participation by 50% over the next three years as part of the "Community Engagement" theme.)

2. How do these aims align with your vision and mission?

(Example: Increasing participation aligns with the organisation's mission to engage and empower local communities.)

On the next page you can find an example of developing your strategic aims as well as a table to complete for your own organisation.

Example Strategic Aims Table

Strategic Theme	Description	Aim	Alignment with Vision and Mission
Community Engagement	Building strong relationships with the community to increase involvement and awareness	Increase community participation by 50% over the next three years	Increasing participation aligns with the organisation's mission to engage and empower local communities

Blank Strategic Aims Table

Strategic Theme	Description	Aim	Alignment with Vision and Mission



Blank Strategic Aims Table Continued

Strategic Theme	Description	Aim	Alignment with Vision and Mission

By defining clear strategic aims and objectives at the organisational level, your organisation will be well-positioned to achieve long-term success, with every effort aligned with your key strategic themes.

Creating Your One-Page Strategy Summary

Once you've completed your strategic planning process, it's essential to distil everything into a clear and concise one-page summary. This document should capture the essence of your organisation's strategy and be something you can easily communicate to stakeholders, funders, and team members. It will act as your organisation's elevator pitch, summarising the core elements of your strategic direction in a way that's easy to understand and share.

Why Create a One-Page Summary?

Clarity and Focus

- A one-page summary forces you to focus on the most important elements of your strategy, making it easier to communicate.

Quick Reference

- It serves as a quick reference tool for internal and external stakeholders to understand your organisation's direction at a glance.

Engagement

- A well-crafted elevator pitch can inspire and engage others, building support for your vision and goals.



Creating Your One-Page Strategy Summary

What to Include in Your One-Page Strategy Summary

Your one-page summary should capture the most essential elements of your organisation's strategy. Here's a suggested structure to follow:

1. Vision Statement

This is the big-picture view of what your organisation wants to achieve in the long term. It should inspire and provide a sense of purpose.

Example:

"Our vision is to create a future where every young person has the tools and support they need to thrive in their communities."

2. Mission Statement

Your mission statement should explain what your organisation does and how you achieve your vision. It should be clear and action-oriented.

Example:

"Our mission is to empower young people by providing mentoring, educational resources, and life skills training to build confidence and resilience."

3. Core Values

Summarise your organisation's core values in a few bullet points. These values should highlight what guides your decisions and behaviours.

Example:

- *Integrity*
- *Innovation*
- *Respect*
- *Community Focus*



Creating Your One-Page Strategy Summary

4. Strategic Themes and Goals

For each of your strategic themes, list the associated strategic goals. These goals should be measurable and directly tied to the themes, helping your organisation achieve its mission.

Example:

Strategic Theme 1: Community Engagement

- **Aims:**
 - a. Increase the number of community partnerships by 30% over the next two years.*
 - b. Launch five new community outreach initiatives to engage underserved populations.*

Strategic Theme 2: Organisational Capacity

- **Aims:**
 - a. Implement a new training programme to upskill 80% of staff by the end of the year.*
 - b. Upgrade internal systems to improve operational efficiency by 25% within 18 months.*

Strategic Theme 3: Financial Sustainability

- **Aims:**
 - a. Secure £500,000 in multi-year funding to sustain growth.*
 - b. Develop two new income streams to diversify funding sources over the next three years.*

5. Call to Action

End your one-page strategy summary with a call to action. This can be a request for support, collaboration, or involvement in your organisation's mission.

Example:

"Join us in building a brighter future for young people. Whether through funding, volunteering, or partnerships, your support can help transform lives."



Creating Your One-Page Strategy Summary

Steps to Create your One-Page Strategy Summary

1. Review Your Strategy Document

Look back at your vision, mission, values, strategic themes, and goals. Focus on the elements that are most critical to your organisation's identity and direction.

2. Be Concise

Keep your language clear, concise, and focused. This summary should fit on one page, so ensure that every word counts.

3. Highlight Key Priorities

Prioritise the strategic themes and goals that will drive the most impact. This summary is about the key focus areas that will guide your organisation's actions over the next few years.

4. Use Simple Language

Avoid jargon or overly complex language. The goal is for anyone, whether they are familiar with your organisation or not, to understand your strategy.

5. Incorporate Visual Elements (Optional)

Consider adding your organisation's logo, colours, or graphics to make the document visually appealing. However, make sure the design doesn't distract from the key content.

6. Get Feedback

Share the draft of your one-page summary with your team, board members, or key stakeholders for feedback. This will ensure that it resonates with different audiences and captures the essence of your strategy.

7. Finalise and Share

Once you've incorporated feedback, finalise the document and share it widely. Use it as a tool to communicate your strategy in meetings, proposals, and on your website.

Over the next few pages, you can find an example of a One-Page Strategy Summary, followed by a blank One-Page Strategy Summary template.



Example One-Page Strategy Summary

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Washington Lane Development Trust

Vision:

To support the community through collaboration and engagement and to facilitate its sustainable growth, prosperity and resilience.

Mission:

To add value to life in Washington Lane and the surrounding area by leading and coordinating projects identified in the community action plan that facilitate sustainable development and build resilience. We will do this in collaboration with individuals, groups and external partners.

Core Values:

- Integrity – we operate to the standards set out in the Trust's Code of Conduct for trustees, members, volunteers and contractors
- Sustainability – we are committed to the long-term economic viability of the Trust and adhere to an environmental policy
- Wellbeing – we work as a team to support each other and the wider community in our endeavours
- Inclusivity – our trustees and members come from all walks of life, and we welcome all contributions
- Resilience – we invest in people, build capable leadership, take a proactive approach to risk management and ensure WLDT is flexible in its response to changing circumstances

Strategic Themes and Goals:

Strategic Theme 1: Community and Recreation

1. Increase community participation by 20% over the next three years
2. Represent the community throughout the development of the community campus
3. Coordinate out of hours access to the new facilities at the community campus
4. Explore the possibility of establishing a base for WLDT on the High Street incorporating a community information point and retail area
5. Explore the possibility of organising a local Octoberfest event

Strategic Theme 2: Environment

1. Explore feasibility of establishing a motorhome area with waste disposal services
2. Improve signage, lighting and general ambience of the town centre
3. Develop a new orienteering trail
4. Explore the feasibility of a car club

Strategic Theme 3: Financial Sustainability

1. Secure at least £50,000 in funding each year to sustain growth.
2. Develop two new income streams to diversify funding sources over the next three years.

Call to Action:

Join us in facilitating a sustainable future for our community. Whether through funding, volunteering, or partnerships, your support will help make a positive difference.



Example One-Page Strategy Summary

***Your Name* Development Trust**

Vision:

"Our vision is to [insert vision statement]."

Mission:

"Our mission is to [insert mission statement]."

Core Values:

- Value #1
- Value #2
- Value #3
- Value #4
- Value #5

Strategic Themes and Goals:

Strategic Theme 1: [Insert Theme Title]

Aims:

- Goal #1
- Goal #2

Strategic Theme 2: [Insert Theme Title]

Aims:

- Goal #1
- Goal #2

Strategic Theme 3: [Insert Theme Title]

Aims:

- Goal #1
- Goal #2

Call to Action:

"Join us in [insert call to action]. Your support can help us achieve [insert impact]."



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Next steps

Now that you've drafted your One-Page Strategy Summary, your next step might be to learn what your members think of them before you start to use them regularly.

You should ensure that the wider community agrees that your strategy summary captures the spirit of what you do, otherwise you might subsequently find that something important is accidentally omitted. You could do this:

- At your next Annual General Meeting (AGM)
- Using community engagement activities

Once finalised, your strategy summary can be used as the "blueprint" for discussions by your board members, staff and volunteers, shaping and prioritising activities and the direction of your organisation.



DTAS Support: An Overview

What is available?

DTAS Member Support

Networking & Events

- Connect and collaborate through an annual conference, regional events, Community Learning Exchange, and regular peer-to-peer check-in sessions to build relationships and share knowledge.

Training & Resources

- Build organisational capacity through strategic review sessions, trustees and company director training, Continuing Professional Development sessions, and access to a wide range of DTAS publications and toolkits covering best practices

Representation & Influencing

- Leverage DTAS's role as the voice for development trusts to influence policy, and participate in government consultations, and pilot programs. Amplify your voice at the highest levels.

Advice & Support

- Get tailored guidance from dedicated development officers and access expert professional advice on legal matters, to inform and advance your work.
 - Other services include the Workplace Wellbeing Support Service, Coaching Programme and Crisis and Resilience Support
-



DTAS Support: An Overview

Community Ownership Support Service

The Community Ownership Support Service (COSS) has been funded by the Scottish Government to support community based groups in Scotland take a stake in or ownership of previously publicly owned land or buildings. We also support and advise relevant authorities on all aspects of the asset transfer process.

This adviser-based service is being delivered Scotland wide and aims to provide individual community groups and public bodies with a bespoke support service from the first steps to the completion of the asset transfer. Our support includes a combination of:

- Expert advice on all aspects of asset transfer
- Training courses on the asset transfer and asset development process
- A wealth of written materials and training modules
- Web access to information on good practice, toolkits and case studies.
- Sign-posting to other support agencies

Communities will also be able to link into the Development Trusts Association Scotland's wider network to explore the wide range of business models being adopted by other communities throughout Scotland and across the UK.



DTAS Support: An Overview

Democratic Finance

Democratic Finance Scotland supports community and social enterprises to:

1. Diversify and increase their sources of income
2. Ensure money is managed and distributed fairly within their community

Our practical, hands-on support focuses on:

Local, citizen driven sources of income, for example:

- [Community shares](#)
- [Community bonds](#)
- [One off community lotteries](#)
- [Grassroots Legacy Giving](#)

Community-led opportunities from renewable energy developments, for example:

- [Exploring ownership of renewable energy developments](#)
 - [Fair distribution and good governance of Community Benefit Funds](#)
-

How to refer for support:

Visit our website for more information.

- If you are a DTAS member, please contact your Development Officer. Their contact details can be found at <https://dtascot.org.uk/about-dtas/staff>
- If you are not a DTAS member and you'd like to be one, visit our website for information on how to do so – <https://dtascot.org.uk/join-us/join-us>

Phone: 0131 220 2456
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