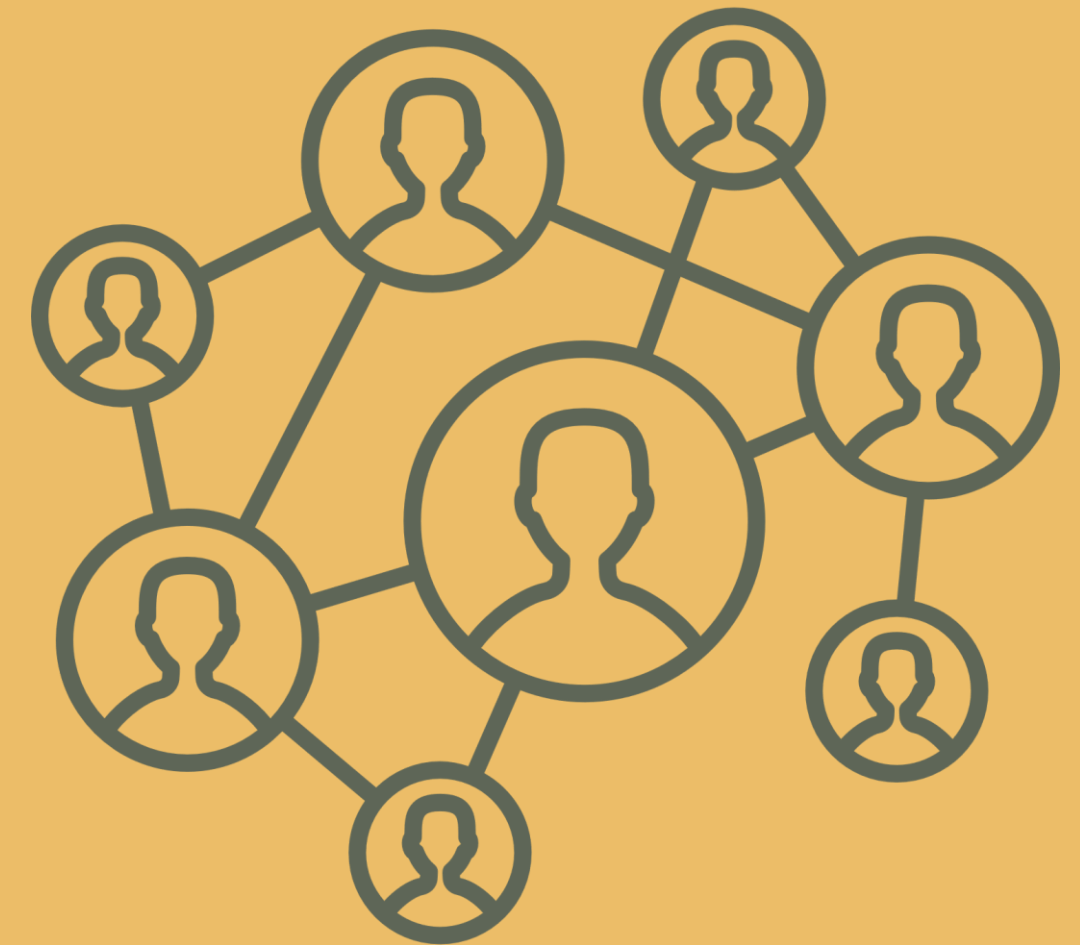


Using the post-it notes, answer the  
questions on the wall

DTAS Annual Conference 2025

# Understanding your organisation's future: Using DTAS' Vision, Mission and Values Toolkit



**Development Trusts Association Scotland**

Amy Punton - Wellbeing & Inclusion Coordinator  
Errin Anderson- Recovery and Resilience Lead

## Agenda

# What we'll discuss



→ Vision, Mission and Values Toolkit

→ Personal values

# Vision, Mission and Values Toolkit



## What is the toolkit for?

- Define your Vision, Mission, Values, and Strategic Goals
- Create a One-Page Strategy that is clear, concise and easy to communicate

## What is included?

- 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

# Vision, Mission and Values Toolkit

DEVELOPMENT TRUSTS  
ASSOCIATION SCOTLAND

## Vision, Mission and Values Toolkit

January 2025

### Your vision should...

- Clear and easy to understand
- Reflect the ultimate goal of the organisation
- Be inspiring to members, stakeholder and the community
- Be easily communicated

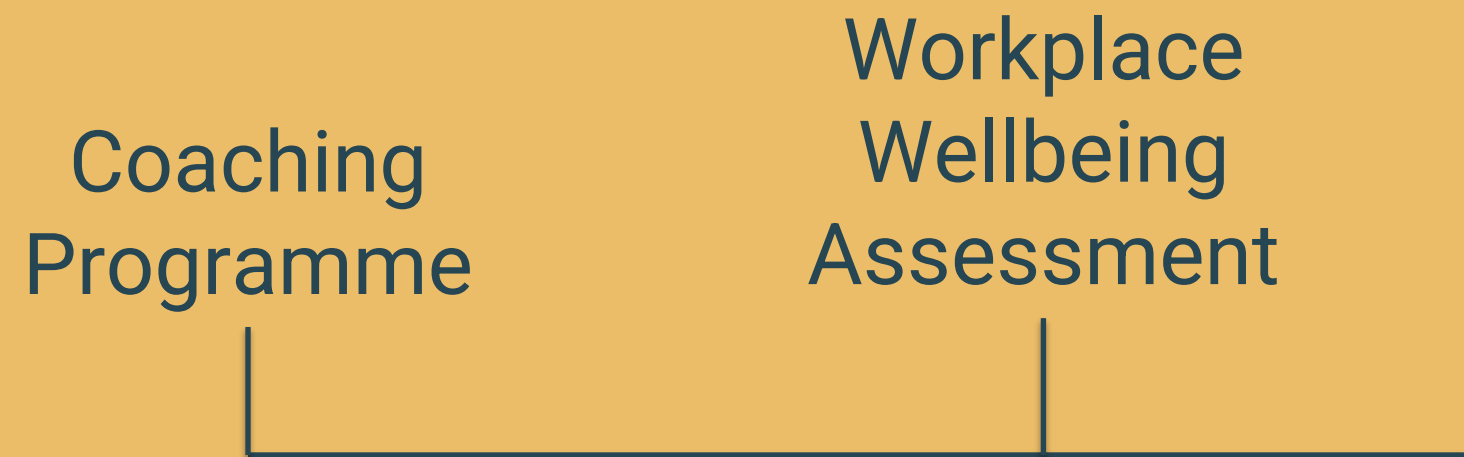
### Your mission should...

- Explain what you do and why
- Be clear and concise
- Reflect the values and aspiration of the organisation

### Your values should...

- Be shared by the whole organisation
- Guide decision making and behaviour
- Be included in your organisation's policies or governance
- Be reflected in your culture and actions

# An example: The journey of a development trust



## Main issues:

- Poor morale
- Not clear on roles and responsibilities
- No clear direction
- Constant firefighting
- No agreed organisational priorities

# An example: The journey of a development trust



# Vision, Mission and Values Toolkit

## Before

### VISION

“A thriving, diverse, balanced and sustainable community where those who live and work are free to enjoy a fulfilling and meaningful existence in an environment which recognises, honours, and preserves the unique heritage of the area, while accommodating and facilitating the necessary and desirable needs of the present and future: a community that is unique, inclusive, vibrant, inspiring and welcoming; a community that values and appreciates its heritage.”

### MISSION

- To foster and nurture the growth and development of a sustainable, culturally and socially cohesive community, where residents live in mutual respect, and where community involvement is encouraged and supported.
- To preserve and promote the area's built and cultural heritage, while striving to ensure that any new development adds positively to the fabric and function of the area.
- To develop enterprising and innovative projects sympathetic to local needs.
- To promote education and training appropriate to local needs, particularly for those in need of and without access to such opportunities.
- To foster and promote progressive environmental policies, including the establishment and upkeep of gardens and green spaces.

### KEY VALUES

Community / Diversity / Inclusion / Empowerment / Openness

Heritage / Conservation / Sustainability / Development

### Main issues:

- 30+ pages
- Not understood by everyone
- Lived on a shelf, unused
- Lots of words, no clear language
- No clear organisational direction
- Not up to date



# Vision, Mission and Values Toolkit

## After

### Vision Statement

A thriving [REDACTED] Community where individuals have the space to foster growth and build connections.

### Mission Statement

Our mission is to provide safe spaces and resources through community-led initiatives that engage individuals in creating a fulfilling and thriving life.

### **Values**

- **Wellbeing**  
We are committed to looking after our people –ensuring they have everything they need to live fulfilling and thriving lives.
- **Accountability**  
As a trust, we are accountable to the community, funders, and legal bodies, maintaining transparency in our operations.
- **Inclusivity**  
We are dedicated to ensuring anyone can access our safe spaces, provisions, and resources without barriers.
- **Connection**  
Our focus is on building lasting partnerships across the community and beyond.
- **Respect**  
We strive to continue developing confidence both internally and externally to shape our actions and decisions.

### Improvements:

- 1 page strategy summary
- Clear and concise language
- Agreed by the whole organisation
- Collaboration by staff and board
- Understanding of individual roles
- Communicated with community
- Overall organisational morale and wellbeing
- Values that aligned with projects

**Let's talk values...**

**Why are values important for wellbeing?**

# Organisationally

## Capacity building

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

## Shows 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.

## Allows for constructive feedback

If you are 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.

## Provides purpose

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

## Enables a united organisation

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

# Personally

- Capacity building

Knowing your values helps you decide where to put your energy, so you don't take on things that aren't right for you.

- Authenticity

Living by your values means you show up as yourself. It builds trust and makes life feel less like a performance.

- Understand what drives you

Your values highlight what matters most. They give you clues about what motivates you and what holds you back.

- Provides purpose

Clear values give direction. They help you see how your everyday choices connect to the bigger picture

# Values

## SHARING

You're welcome to share—only if you want to.

## SAFE SPACE

Respect privacy. What's shared here stays here.

## THINK "YOU"

Focus on *your* own values—this is personal.

# What's Important to You?

Prompt 1:

“What’s important to you about *work*?”

Write down 5–10 things

Prompt 2:

“What’s important to you about *relationships*?”

Write 5–10 things

Prompt 3:

“What’s important to you about *family*?”

Another 5–10 things

Reminder: Write the exact words that come to mind – no paraphrasing.

# Find Hidden Values

“If all these values were present in your work, what might still make you leave?”



# Prioritise

Now rank each of your values from 1 to 30

1 = most important  
30 = least important

# Narrow Down

Cross out any value ranked 6 or above

# Top 5 Values

- Do they represent who you are?
- Do they guide how you live?
- Are they the person you want to be?



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**Thank you!**

Amy Punton  
Wellbeing & Inclusion Coordinator  
[amy@dtascot.org.uk](mailto:amy@dtascot.org.uk)

Errin Anderson  
Recovery and Resilience Lead  
[errin@dtascot.org.uk](mailto:errin@dtascot.org.uk)