

Welcome!

Using the post-it notes or sticky dots,
please answer the questions on the wall



DTAS Annual Conference 2026

From Vision to Action:

Building a practical strategy and operational plan

A practical and interactive workshop designed to help turn ideas into action



DTAS and Killin and Ardeonaig CDT

Amy Punton, Chris Sanderson and Fig Horner



Who are we?

Chris Sanderson

—

Member Support Advisor
for Central Scotland

Amy Punton

—

Wellbeing & Learning
Officer

Fig Horner

—

Operations Manager
Killin and Ardeonaig CDT



Agenda

What we'll discuss this afternoon



Why strategy and plans are important



Hear from Fig and his experience



Some activities from our toolkits!



Some discussion!



1. What would happen if your organisational purpose was unclear internally?

2. What would happen if your organisational purpose was unclear externally?



What would happen if your organisational purpose was unclear internally?

- 1 Lack of understanding of individual roles
- 2 Unclear communication with the community
- 3 Difficulty writing funding applications
- 4 Danger of taking on too many projects, with limited capacity



What would happen if your organisational purpose was unclear externally?

- 1 Lack of understanding in the community of what the organisation is
- 2 Difficult for funders to understand what the organisation prioritises
- 3 Challenge recruiting new board members, volunteers and staff
- 4 Missing opportunities with stakeholders



What are the toolkits?



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

What are the toolkits?



What is the toolkit for?

- Designed to help you bridge the gap between “what we want to achieve” and “how we’re going to achieve it.”

Think of it as:

- Strategy answers: “What do we want to achieve?”
- Operational plan answers: “How, when, who, and with what resources will we achieve it?”

What is included?

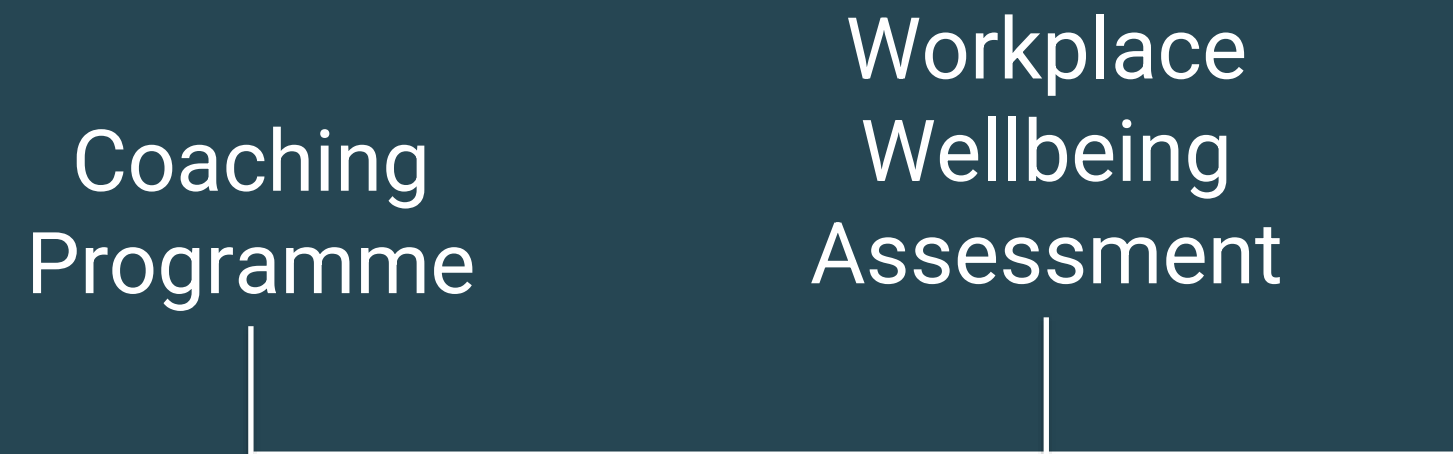
- Activities that turn planning into an interactive process
- Exercises that are designed for group participation

What are the benefits of having a clear purpose?

- 1 Improve funding applications
- 2 Recruit board members who share the same vision
- 3 Consistent communication with the community
- 4 Make decisions confidently



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  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

Over to...

Fig Horner

Operations Manager
Killin and Ardeonaig CDT



Over to you...



The tasks...

Working in groups, complete the following activities in the toolkit:

- Vision and mission
- Turning aims into activities
- Turning activities in outcomes



The scenario...



Vision and mission...



From aims to outcomes...



Discussion...

An opportunity to ask questions of each other and share your experiences





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Thank you!

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