

## Mission and Vision Worksheet

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**Mission** statements capture the core purpose of the organization and why it exists. Strong mission statements should articulate:

- Who the organization serves
- What the organization does / its core service offerings
- The end result the organization seeks to achieve / the value it seeks to provide

An effective mission statement is:

- Clear, concise and to the point
- Realistic
- Informative and forward-thinking
- Positive
- Descriptive of what success looks like for the organization

If your organization has a mission statement, capture it below and think about how well it meets the above criteria. If your organization does not have a mission statement, think about some potential wording for a mission statement based on the criteria listed above and jot down your ideas below.

**Vision** statements serve as aspirational proclamations that define the future state of the organization you seek to create.

An effective vision statement:

- Clearly describes where the organization wants to go
- Serves as a source of inspiration and motivation
- Provides clear decision-making guidance
- Is perceived as an achievable “stretch” target

If your organization has a vision statement, capture it below and think about how well it meets the above criteria. If your organization does not have a vision statement, think about some potential wording for a vision statement based on the criteria listed above and jot down your ideas below.

## Strengths, Weaknesses, Opportunities & Threats (SWOT) Analysis

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*Use information gathered through the environmental scan and assess your organization's core competencies to capture your strengths, weaknesses, opportunities and threats below.*

<b>Strengths</b> Positive tangible and intangible attributes of the organization; value-creating skills or assets.	<b>Weaknesses</b> Internal factors that could constrain an organization's ability to achieve its mission or strategies.
<b>Opportunities</b> Courses of action that offer the possibility to advance organizational strategies.	<b>Threats</b> Internal or external factors beyond the organization's control that could place the organization's mission or strategies at risk.

## Environmental Scan Worksheet

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“Scan” for trends and changes in your external and internal environments. Consider factors such as those listed below and capture the major environmental trends that will influence the strategies or ongoing operations of the organization over your specific planning horizon.

***Social Factors:*** *Cultural aspects such as health consciousness, demographic changes such as population growth rate, age distribution, career attitudes. How will an aging workforce affect your ability to meet future needs?*

***Technological Factors:*** *Emerging technologies, research and development activity, automation, technology incentives and the rate of technological change. Technological shifts can affect costs, quality, and lead to innovation.*

***Economic Factors:*** *Economic growth, interest rates, exchange rates and the inflation rate.*

***Ecologic Factors:*** *The present-day situation of the physical and biological environments the company faces.*

***Political Factors/Legal/ Regulatory Factors:*** *New administration and new agendas. New or pending legislation, employment law, and health and safety law.*