**Welcome to Resilient Heritage: Business Modules**

This Is Section 1: Who Are We? Developing Our Organisational Identity. Module 1.3 Defining Boundaries and Specifying Aims and Objectives.  
  
This sessio will help us to focus and define our organisations activities and assets and help us begin to consider how we can create a clarity of mission. This will better engage stakeholders, funders and the wider community on our organisation’s aims and objectives and support long term planning and overall sustainable strategies for sustainable practices.  
  
It is hoped that discussion of SWOT analysis, along with the associated template (supplied with this module) will help you to assess your organisations own internal and external assets, challenges and goals, and you will be able to use this to begin to collate information that will support the development of your constitution and business plan in subsequent modules. It will therefore cover the following information:

* Defining boundaries
* SWOT analysis
* Future planning

We will firstly consider the importance of defining boundaries within your organisation, and how this can help us strengthen and enhance our existing assets - as well as identify gaps where external support and fundraising is needed.

# **Swot Analysis**

We will then explore the benefits of using a SWOT analysis to help us to understand these boundaries and will go through how this can be achieved for your organisation to realise your strengths and weaknesses.

# **Future Planning**

We will consider how the results of our SWOT analysis can assist our organisational planning for the future and use examples to explore some of the key terminology to carry this out.

# **Defining Boundaries**

Defining boundaries within a charitable organisation can help to ensure that your organisation staysfocus(ed) on its mission and purpose. This helps to make strategic decisions and allocate resources effectively, and also avoid mission drift during the planning, fundraising and execution of your organisation’s activities.  
  
Boundaries can also help stakeholders, (including donors, volunteers, and beneficiaries) understand your organisation's purpose and goals, and can help potential external partners and collaborators identify where your mission and activities complement their own. This can support strategic partnerships that enhance the organisation's capacity and reach and identify specific areas or programs where additional fundraising efforts are needed to fill gaps and meet unmet needs, helping to enhance efficiency and impact of limited funding stream and resources.  
  
Boundaries can help your organisation to better allocate resources, including time, money, and manpower, as this can focus resources on activities that align with the organisation's mission and help maximise the impact of existing assets, including funds, human capital, and infrastructure.   
  
Boundaries can also provide a framework for identifying and managing risks associated with your organisation's activities. By clearly delineating what falls within the scope of its mission, the organisation can minimise legal, financial, and reputational risks.  
  
Defining boundaries within your organisation's purpose is therefore essential for maintaining focus, optimising resources, managing risks, and maximising impact. By following a structured process to define boundaries and regularly evaluating activities against them, organisations can strengthen their existing assets, identify areas for improvement, and better fulfil their mission.   
  
Clearly defined boundaries facilitate better measurement and evaluation of the organisation's impact, allowing you to demonstrate effectiveness to donors, stakeholders, and the broader community.  
  
**Case Study: HMS Unicorn**

“My name is Matthew Bellhouse Moran. I'm Director of Museum and Development for the Unicorn Preservation Society, which is the charity that looks after HMS unicorn. HMS unicorn is a big old wooden ship and still a float. She was launched in 1824, down in England, what is now Chatham Historic Dockyard as a Navy Warship and has been in Dundee for about 150 of her 200 years. It's her 200th anniversary this year. We are the oldest ship in Scotland, third oldest ship in the world that's still afloat and of all of the big ships that aren't archaeological wrecks or Viking long ships, we are the most original, having never been rebuilt. The cutthroat world that we're in with museums now means that you have to have a point and a purpose beyond just preserving the thing that you look after. So, the society, the charity has lent very hard into being a proper Museum, as they would say, as opposed to a sort of what it was treated at as, which was a sort of village hall type venue and not a great focus spent on the visitor experience. We have focused very hard on being a museum with charitable purposes and social benefit, as opposed to generating revenue through event hire. Concurrent to all this, Unicorn has been deteriorating in condition and will continue to deteriorate at an increasing rate, and so it's even more important to have a good, solid, understandable purpose, so that stakeholders at any level, whether it's the leader of the council or you know, somebody in the street, when they say, Well, why should we care if it sinks tomorrow? You can say, well, you would lose out on all these social benefits and benefits and benefits the local community, which justify why we exist.”  
  
**SWOT Analysis**A SWOT analysis can be a valuable tool to help your organisation define its boundaries and mission, whilst also identifying aims, objectives and gaps for fundraising and support. The process to carry out a SWOT assessment - though relatively simple - provides a comprehensive framework for assessing internal strengths and weaknesses, as well as external opportunities and threats. There is a downloadable template associated with this module for you to carry out your own organisations’ own SWOT analysis By leveraging the insights gained from your SWOT analysis, your organisation will be able to define boundaries within its purpose that capitalise on its **strengths**, address **weaknesses** seize **opportunities** and mitigate **threats** ultimately enhancing your overall effectiveness and long-term sustainability. For instance, identification of your **strengths** defines the internal capabilities and resources that your organisation already possesses, such as skilled team members, cultural heritage assets, and community buy-in through local volunteers.   
  
Understanding these strengths can help your organisation define its boundaries by highlighting areas where it has a comparative advantage and where it can focus its efforts to maximise impact.  
  
Identifying **weaknesses** will provide insight intointernal factors that hinder your organisation's ability to achieve its goals. Conducting a SWOT analysis helps your organisation to identify areas where it may be falling short, such as limited funding, lack of volunteer support, or precarious assets, such as high conservation and consolidation needs to preserve a cultural asset.  
  
By acknowledging areas of weakness within your organisation, you can set boundaries that address these challenges, ensuring that resources are allocated effectively, while areas of weakness are either strengthened or minimised in scope.  
  
**Opportunities** are external factors that your organisation can leverage to its advantage. Through a SWOT analysis, you should be able to identify opportunities within the external environment, such as emerging funding sources, potential partnerships, or unmet needs within the community.  
  
Identifying these opportunities allows your organisation to define boundaries that align with emerging trends and external opportunities, enabling it to capitalise on these factors and enhance its impact and sustainability.  
  
**Threats** are external factors that could pose challenges or risks to your organisation's success. By conducting a SWOT analysis, you can identify potential threats such as funding cuts, damage to a heritage asset from extreme weather, or loss of staffing and voluntary assistance.  
  
Understanding these threats helps your organisation set boundaries that mitigate risks and safeguard its mission and assets. It can also inform contingency planning and risk management strategies.   
  
**Future Planning**  
While using SWOT analysis quantifies your organisation's status and requirements in the present, delving deeper into your organisation's future desires and goals can offer clear direction to advance your ambitions, and create long term plans and impacts for its future.  
  
This can be accomplished by defining your organisation's vision, mission, objectives, and the goals necessary to achieve your aims - which are all important elements of planning and goal setting. By developing a roadmap for short, medium, and long-term aims, you can provide direction and ensure everyone stays aligned to support your organisation to carry out its objectives.  
  
A downloadable template associated with this module to carry out your organisations’ own future planning, is available in the associated links found on this module’s webpage. However, in the remainder of this section, we will go through key terminology

* Vision Statement
* Mission Statement
* Aims
* Goals
* Objectives

and provide an example from a Cultural Heritage perspective.

If we were to take the following example:(that)An organisation wants to create a community archive to record and protect its cultural heritage.

# **Vision Statement** Our Vision Statement might be:

"Our vision is to become the guardian of our community's cultural heritage, preserving it for future generations."

This vision statement outlines the ultimate goal or desired future state of the organisation. It describes what the organisation hopes to achieve through its efforts in the long term. In this case, it articulates the aspiration to safeguard and preserve the community's cultural heritage through the establishment of a community archive.

# **Mission Statement**

Our mission statement could be:

"Our mission is to collect, digitise, and curate artifacts, documents, and stories that represent our community's cultural identity. Through collaboration and education, we aim to ensure accessibility and promote appreciation of our heritage."  
  
The Strengths and Opportunities identified within our SWOT analysis, will support the development of our organisation’s identity through the production of a mission statement.  
A mission statement is a short, direct, and compelling way to state the core strategy for our organisation. It describes the purpose or reason for our organisation's existence and the actions needed to fulfil this vision. It outlines what the organisation does, for whom, and how it does it. In this case, it delineates the specific activities and strategies the organisation will undertake to achieve its vision of preserving cultural heritage.

# **Aims** Our Aims for our organisation then, could be

1. To safeguard and preserve the cultural heritage of the community.
2. To promote awareness and appreciation of the community's cultural identity.
3. To ensure the accessibility of cultural artifacts and documents for present and future generations.

# **Goals**

Our organisation’s Goals could be to:

1. Establish a comprehensive archive facility to store cultural artifacts and documents.
2. Digitise existing cultural materials to ensure their long-term preservation and accessibility.
3. Collaborate with local institutions, organisations, and individuals to collect artifacts, documents, and stories.
4. Develop educational programs and outreach initiatives to raise awareness about the community's cultural heritage.
5. Engage community members in the archival process through volunteering, workshops, and events.

# **Objectives** Ourobjectives - which need to be specific, measurable, achievable, relevant and time-bound (smart) **-** would be:

1. Acquire suitable premises for the archive facility within the next year.
2. Digitise and catalogue 50% of the existing cultural artifacts and documents within the first two years of operation.
3. Establish partnerships with at least three local museums, libraries, or historical societies within the first six months.
4. Host monthly educational workshops on topics related to cultural heritage preservation and history.
5. Recruit and train 20 volunteers to assist with archival tasks within the first year.
6. Develop an online platform for accessing digitised materials within the next 18 months.

In summary then, your vision represents the long-term direction of an organisation, your mission explains its purpose, your aims are broad goals, and your objectives are specific, measurable goals that help to achieve the aims. Taking the time to define these is important for the direction and purpose of your organisation, and for helping it to achieve a long term and sustainable future.

This is the end of Module 1.3 - and the end of section 1: Who Are We? Developing Our Organisational Identity.Further information can be found in the subsequent Sections ofResilient Heritage: Business Modules.