

Understanding Strategy:

- ❖ Vision
- ❖ Mission Statement
- ❖ Goals
- ❖ Objectives
- ❖ Values
- ❖ Strategic Planning



Vision

- The future you intend to create; your grand plan—how you're going to change the world
 - Paints a clear picture of the future
 - Where are we headed
 - It must motivate, be ambitious and stretch people
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- *A Harmonious World of Enlightened Beings*

Mission

- Your core work; what are you going to do to work towards making your vision a reality, and how are you going to do it?
 - Why do we exist as an organisation?
 - Why are we here?
 - Describe the purpose of the organisation in clear terms?
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- *To serve humanity by cultivating an ever deepening understanding and realisation of the Ageless Wisdom, spiritual self-transformation, and the Unity of all Life*

Values

- The guiding principles for which you stand; the ideals you refuse to compromise as you conduct your mission in pursuit of your vision.
 - Altruism
 - Respect
 - Diversity
 - Recognising of the Oneness of All Life
 - Co-operation
 - Integrity

Groups must keep their values alive, practiced, and promoted. This is a choice. This is an intentional act. Values are most definitely not just a piece of paper. Just like plans shouldn't be shelved, values shouldn't be either.



Goals

- A goal is where you want to be, a target or a destination
- Goals are directly related to vision and mission
- Goals measure progress towards achieving vision, mission & strategies

Objectives

- An objective is the direction you have to take to get to your destination
 - An objective acts as a smaller goal that you can accomplish to get closer to achieving your overall goal.

Strategy

- A strategy is a method or approach to accomplishing objectives and achieving goals. In other words; a strategy is what you have to do to get there.
- Strategies provide a pragmatic roadmap of how mission, vision, and goals will be accomplished over time.
- Note: Often the word “Strategy” is used to denote all of this together – mission statement, strategy planning i.e. SWOT Analysis, goal setting, defining objectives, tracking progress etc.

What is Strategic Planning?

- Strategic Planning is a process where organisations define a bold vision and create a plan with objectives and goals to reach that future.
- A great strategic plan defines where your organisation is going, how you'll get there, who must do what, and how you'll review and adapt your strategy.

Values

- Effective organizations possess clearly articulated values and behave in accordance with these values. Values form the foundation for all organizational activities, choices and decisions, and actions. Values are management and governance tools that -
- Help test mission and determine vision and program;
- Serve as a screen to determine the worthiness, appropriateness, and robustness of all operations;
- Provide the framework for policies and procedures, program delivery system, communications, and fund development strategies; and
- Evaluate whether new people align with organizational values and are invited to join.
- In their study of visionary companies ([Built to Last](#), 1994), James C. Collins and Jerry I. Porras observed that companies last specifically because they have clearly articulated values. These values remain fixed even while business goals and products, strategies, and practices change in response to the changing world.
- The most effective organizations continually distinguish between that which is core—unchanging and constant—and that which can and often should change. These organizations discuss how a value affects a particular decision. These organizations identify value conflicts and have a process to make ethical decisions. These organizations regularly assess whether or not behavior is aligned with values. And these organizations ask individuals to leave who do not publicly affirm and act upon the group's values.

Watch out!

- As groups grow and change—when some people leave and new people join—the values still form the foundation for existence. But be wary. Sometimes, the values lose their position in the forefront of the group.
- Perhaps the new people and incumbents didn't use values as a screening device. Individuals may join the group without understanding the values and agreeing to follow them.
- Maybe board meetings ignore the values lens during conversations and decision-making. Maybe expediency dominates. Maybe complacency sets in. And suddenly, the organization no longer adheres to its values.
- I've seen all this. It's sad and ugly.
- I've watched organizations kill themselves without articulated and lived values. It makes me angry.
- Groups must keep their values alive, practiced, and promoted. This is a choice. This is an intentional act. Values are most definitely not just a piece of paper. Just like plans shouldn't be shelved, values shouldn't be either.

The Strategic Pyramid



TSNZ Strategy 2020 - 2023

GOAL 1: To encourage members in the exploration of theosophy and the unfoldment of their inner nature

1.1 Develop our people and potential leaders through an ongoing programme of workshops / events and mentoring:

1.2 Developing reusable practical study programmes in collaboration with TS branches and centres:

1.3 Offering quality events with mixture of head and heart learning:

GOAL 2: To Create greater public visibility and awareness of theosophy

2.1 Engage in active promotion of the Theosophical Society through online advertising and presence:

2.2 Greater involvement in community programmes including targeted sponsorship:

Note 1: Board sets Goals and Objectives

Note 2: How Objectives are carried out is up to management to decide on best way to to implement. Objectives are broken down into actions by management and these are fleshed out with dates and a budget where required.

Important Notes

- There are many frameworks, templates, ways of doing strategy – each organisation selects the approach that work best for them
- ‘Not for Profit’ organisations are not all the same either. Many focus on research, funding and grants which dictates how the Board and Management work
- Setting strategy to assist people’s spiritual growth is difficult to some extent and involves areas that can hard to measure

TSNZ Strategic Planning Process *(example)*

Swot Analysis
Updated 27/04/2019

- Strategy is set for a 4-year period
- Calendar period Jan- Dec is used
- TSNZ strategy is an ongoing continuum
- Major review in the year of its completion i.e. 2020 – 2023 period, we spend 2023 with branch feedback loops, SWOT sessions etc for the new strategy to be approved at 2024 AGM (covering period 2024-2027)

Strengths

Books/library
Public talks
Speakers (local and international)
TheoSophia Magazine
Theosophy Digest
Website
Brochures
Focus on unity
Freedom of thought
School of Theosophy (GC Resolutions)
Immersion Weekend
Convention
TS Worldview

Weaknesses

Lack of resources for the young/teenagers
Not relating to other groups
Lack of deep theosophical knowledge and principle
Not progressive enough
Overly intellectual
Not put into practice
Out dated presenting styles
Branch websites not being updated
Focus on difference rather than commonality
Ability to attract young people
Online material

Opportunities

New member orientation
Death and Dying...Hospices - workshop
Virtual branch and study group
Schools
Hire young person who understands apps for presentation
Outside trainer to train good facilitators and Coaches (Coaching Theosophy)
Mentors in theosophy
Grow membership base
Meditation... train people to lead
Brochure revision
Interactive presentations
Personal contact/fellowship
Webinars
Increasing number of TS centre
Leadership training
Encourage enquiry approach to learning

Threats

Membership numbers down
Lodges don't exist
Becoming irrelevant
Message not reaching
Theosophy becomes a history lesson rather than living wisdom
Lack of speakers
Other groups