

Step 1- The Mission and Vision Statement

To start the succession planning process you need to ensure that you know what you do, how you do it and also why you do it. You also need to know what long-term inspired change you want to bring about. The former is about here and now, the latter about your vision and aspirations for the future.

The Mission

A Mission establishes the distinctiveness and importance of what the organisation does and its value to the communities it serves. The key question being asked of every organisation is, 'What is the value to the community?' A good mission statement is the answer to that question.

Mission statements must be clear, practical, and up to date. The mission statement describes the reason your organisation exists and is used to guide decisions about priorities, actions, and responsibilities. Revisit your mission statement – does it still reflect the current purpose of the organisation?

The Royal Historical Society of Victoria have developed a useful guide to developing a mission statement:

'A Mission Statement, also known as a Statement of Purpose defines the broad aims of the organisation. In summary form, usually one or two sentences, the Mission Statement includes the primary reason for existence of the organisation and lists the prime functions. For historical societies and museums the geographical area covered, the time period and / or main subject interest may be considered when formulating a Mission Statement.'

It is important to develop and approve the Mission Statement as a group because it forces the members of the organisation to identify, reflect and agree on the main activity of the organisation. Mission statements can take a long time to agree upon but in the end the phrase or sentences may be very simple; the most important thing is that its meaning is understood'.

An understanding of whom your society is aimed at and what it will offer the community will help you plan your society so it can be relevant and well supported. Being able to show how your society adds value to your community can also assist with attracting funding and government support.

The official 'objects' in the constitution should be aligned with the mission statement. However many official 'objects' have been written some time ago and may no longer reflect the contemporary purpose of the organisation. If you update your mission statement in line with what you are trying to achieve you will need to amend the constitution.

Vision Statement

While a Mission Statement describes what you want to do now, a vision statement defines the aspirations of your organisation. Developing a Vision Statement is a useful exercise as it forces you to outline your value or usefulness – the contribution you wish to make. Strong vision statements are inspirational, clear, memorable and concise.

Many historical societies develop an educational and community-oriented vision statement with an outward looking perspective. An outward looking perspective points to how historical societies serve the community and value add to public benefit. This enables a society to outline how it intends to use its assets and resources to contribute to the change it envisions. This may include intangibles such as health benefits, social connection and increased community resilience. A statement that defines a society's usefulness, whom it will serve in the community and the distinctive way it will do this, is a robust tool for facing the future.

'We are in the business of serving the community'

Christine Elaine, Cockburn Historical Society

Below are examples of mission and vision statements from historical societies in Australia and overseas.

The Puffing Billy Preservation Society, Victoria	
Mission Statement	Vision Statement
To preserve, restore and operate the Puffing Billy Railway as Australia's premier heritage steam railway, in a safe efficient and economically sustainable manner, for the ongoing education, benefit and satisfaction of the community, customers and the Railway stakeholders, including staff, volunteers and members.	Engaging people in the preservation of Puffing Billy Railway for current and future generations
Royal Western Australian Historical Society	
Mission Statement	Vision Statement
Foster interest in and enjoyment of Western Australian history foster and promote research, writing and publication about all aspects of Western Australian history Recognise outstanding achievement in Western Australian historical research, education and publication Be recognised as a leader in the promotion of the history of Western Australia Cooperate with all others in the field in the study and promotion of the history of Western Australia Be a recognised resource for Western Australian history to complement State collections Be recognised as an advocate in the conservation and promotion of the State's cultural heritage. Encourage and support local Affiliated Societies throughout the State.	Present and future generations will have access to the history of Western Australia.
Cheshire Historical Society, UK	
Keeping Cheshire's history alive through our museum's collections, exhibitions and programs.	The Cheshire Historical Society will be totally integrated in the life and interest of the community as the visually and technologically accessible source of regional historical information and knowledge.
Historical Society of Central Florida, US	
Mission Statement	Vision Statement
The Society's mission is to preserve Orange County and Central Florida heritage by providing resources to help maintain the Orange County Regional History Center where history is learned through exhibits and educational programs relating history to our daily lives.	Our vision is to build resourceful relationships that help Orange County Regional History Center become a leader in providing comprehensive life-long learning.



1. Mission and Vision Statement

In the mission statement section state in meaningful terms the purpose of the organisation. Complete the vision statement outlining future visions and aspirations for your society.

	Statements to define and guide your organisation
Mission Statement (define the broad aims of the organisation to identify the distinctiveness and importance of the organisation)	
Vision Statement (describe the clear and inspirational long-term desired change resulting from your organisation's work)	