**Reviewing and Developing Your Strategy**

***“If you want to build a boat, do not drum up people to collect wood or assign them tasks or work, but rather teach them to long for the endless immensity of the sea”!*** (Antione de Saint-Exupery)

**Introduction**

One of the key components of a resilient archive service is establishing an outcomes-based strategy, which is aligned with the vision, mission and strategy of the parent body and key funding partners. Strategy should be reviewed and enhanced on an annual basis to ensure it remains relevant and effective. This also provides a *building block* for other types of service review and change programmes.

Strategy is simply the collective answers to the following questions:

* ***What are we trying to achieve through our services?***
* ***For whom?***
* ***For what purpose?***

And….

* ***How can we ensure that we achieve this?***

These are easy questions, with very challenging answers! Developing and aligning outcomes-based strategy requires significant thought and discussion amongst leaders, staff, partners and funders / commissioners – but it is a significant and very worthwhile exercise which provides a springboard for genuine long-term impact. More specifically, it achieves the following:

1. **helps the service team and internal and external partners to focus on the needs and expectations of your community and other stakeholders**
2. **generates continual service innovation and improvement**
3. **provides an excellent basis for collaborative working**
4. **enables the parent body, funders and other stakeholders to understand the impact of the archive service on health, communities, the economy and the environment**

**A warm-up!**

***What is the unique impact of your archive service?***

**Now communicate this with a passion in one-minute!**

**Vision and Mission**

The pinnacle of this thinking is to establish ***vision*** and ***mission*** and make these truly valuable for the organisation and partners.

In the context of archives and heritage services, the term ***vision*** relates to the legacy that you and your partners are seeking to leave behind. It needs to be agreed by consensus (amongst leaders), clear and compelling, so that everyone is united behind in pursuing a common goal.

**Imagine a time when everything that you and your partners want has been achieved. This moment makes you feel that your work has all been worthwhile. Describe what is making you feel so good. What do you want to be recorded as your collective legacy?**

**Review your current *vision* statement (if you have one) and identify actions to improve the statement and the process of developing and refining it.**

Your ***mission*** relates to the raison d’être of your organisation….it is the purpose which justifies your continuing existence. Your organisation’s mission should be developed, agreed and continually refined by leaders. It should form the basis for your strategy and plans, a rationale for your continued funding.

**What purpose justifies your organisation’s continuing existence? What unique value does your organisation add to various stakeholders?**

**Review your current *mission* statement (if you have one) and identify actions to improve the statement and the process of developing and refining it.**

**Strategic Outcomes**

The concept of *Outcomes* and *Outcome Frameworks* are significant for all organisations, especially for organisations which attract public funding and have the potential to achieve significant positive impacts on people’s health, communities, economies and the environment. Over the last ten years the use of outcomes has grown significantly within the cultural sector.

Outcome Frameworks contain the following elements:

1. **Service Outcomes**

**Service** **Outcomes** are **what the organisation will directly achieve through its services**. They should be clear (specifically what will change in the future) and have a clear rationale (i.e. what is the reason for your choice of outcome and the specific words within it?), which clearly relates to your organisation’s *mission*. In the heritage sector, Service Outcomes often relate to **more** of something good (e.g. ‘more people…’, ‘greater understanding...’). They could also relate to a **future** **state** which doesn’t current exist (‘easy access for everybody’, a ‘sustainable’ position’). Heritage organisations should include Service Outcomes relating to **equality** and **diversity**.

Although counter-intuitive, the outcome statements do not need specific, quantifiable levels of achievement with timeframes (unless you know the ‘end point’); performance measures and performance targets add these elements (see Section Five). It is best to put these out of your mind when discussing your outcomes, as this can restrict your thinking.

Organisations tend to establish Service Outcomes which relate to the recipients of the service. Ideally Service Outcomes should also be established relating to **financial sustainability** andthe **satisfaction and development of the workforce.**

1. **Intermediate and Overarching Strategic Outcomes**

**Intermediate Outcomes** are **what your Service Outcomes will achieve, in conjunction with partners.** In the heritage sector, these outcomes typically relate to subjects like: shared identity and sense of place amongst local people, community pride, thriving voluntary sector and healthier minds.

**Overarching Strategic Outcomes** are the high-level **social, health, environmental and economic benefits that your outcomes will contribute to** (e.g. stronger, more cohesive communities). In some cases, there will not be a need for both of these two levels.

These outcomes should be directly aligned with vision, mission and strategy of your parent body and key partners (especially current and potential funding partners).

1. **Service Outputs**

These are **the services that the organisation delivers now and in the future for its customers.**

There should be clear and logical threads running throughout these three levels.

**Developing and Reviewing your Outcome Framework**

To develop and / or review the outcome framework for your service, ask, discuss and answer the following questions:

**Service Outcomes:**

**What are you directly seeking to achieve…..**

**….for the community and users of the service?**

**….for the parent body?**

**....for the workforce?**

**For what purpose?**

**Implementing the Outcomes Frameworks through Strategic Priorities**

Developing an agreed framework of strategic outcomes is an excellent starting point for your organisation’s strategy…but it is only a starting point! The hard work to create your outcomes framework will only be value adding if it provides the trigger for **changes** to the services provided to the end customer.

History tells us that organisations can only achieve a small number of changes at once. Therefore, the key is to work out what will make the **greatest** **difference** to achieving the desired outcomes.

**What two organisational improvements will make the greatest difference to achieving your desired outcomes?**

**What two service or marketing innovations will make the greatest difference to achieving your desired outcomes?**

**What new or enhanced collaborations will make the greatest difference to achieving your desired outcomes?**

**Planning Strategic Review for your Service**

Begin to plan how you might conduct a strategic review back in the workplace:

**When can we do this?**

**What should the scope be?**

**Whom should we involve?**

**What are the potential pitfalls?**