Workshop on Establishing an African Association for Health Professional Education and Research

Patrick W. Kelley, MD, DrPH
Director, Board on Global Health Institute of Medicine
US National Academies
What is a Vision Statement?

- A Vision Statement communicates what the “world” will be like (e.g. Africa broadly or more narrowly African health education and research) when the organization achieves its ambitious goals.

- It is written in the present tense and using well-understood, memorable, concise, and motivating terms.
  
  Examples
  - “Google provides access to the world’s information in one click.”
  - “There will be a personal computer on every desk running Microsoft software.”

- It connects with stakeholders and gives them a sense of the organization’s larger purpose.

- It reflects the organization’s values and aspirations for the future.

- It builds upon the organization’s unique foundation and potential.

Board on Global Health
What is a Mission Statement?

- A short (ideally one sentence), clear, realistic, consensus-driven statement of what an organization is about (its purpose) and what it does (its business).
- It reflects the values that underlie the organization’s efforts
- It indicates the issue(s) to be addressed and the desired change(s)
- It reflects relationships to internal and external constituencies
- It sets the foundation for strategic planning to formulate goals and objectives.

Example:

- The Utopian Academy of Sciences, based on principles of integrity, scholarly excellence, and independent, evidence-based scientific analysis [values] seeks to enhance the well-being of the people of Utopia [purpose] through the rigorous and uniquely authoritative development of scientific advice across the full spectrum of societal issues [business].

  Board on Global Health
Elements of a Charter for an Organization

- Establishes the name
- Establishes the reason for creating the organization and the desired improvement over the status quo
- Establishes legal authority for operations
- Determines rules for participation
- Establishes rules for election, service, and dismissal of leaders.
- Provides focus and direction for leaders to includes their privileges and responsibilities
- Educates others about the purpose of the organization and the scope/boundaries of its operations
- Describes governance and accountability structures
- Addresses authority for resource mobilization
- Establishes mechanisms for amendment of the charter.
Elements of a Strategic Plan for an Organization

- Vision Statement
- Mission Statement
- Statement of Guiding Principles
- Assessment of Current Strengths, Weaknesses, Opportunities, Threats to the Organization (SWOT)
- Goals and Timelines for their Achievement
  - Specific
  - Measurable
  - Achievable
  - Relevant
  - Time-bound
- Objectives
- Specific Activities for Implementation
- Critical Factors for Success
- Metrics for Evaluation

Board on Global Health
Elements of a Business Plan for an Organization

- Description of the business and its value proposition
- What is the market for the output from the business organization?
- What are any existing competitive organizations?
- Who would pay for the output from the organization?
- Who benefits from the output?
- What services and products are to be provided to external customers?
- What services and products are provided to internal customers?
- Who are the investors, customers, or beneficiaries?
- What is the budget and how will it be financed?
- How will the business be organized and who will be responsible for what core functions (governance, program development and outreach, program execution, resources, finance, accounting, etc.)?
- What metrics will be used to monitor business success?
- What mix of expertise is needed to achieve success?
- What board and staff leaders will be accountable for what performance?
Contact Us

- Board on Global Health
- Institute of Medicine
- 500 Fifth Street, NW
- Washington, DC 20001

- Board Director: Patrick Kelley
- Tel: 202-334-2534
- pkelley@nas.edu