

Strategic Planning

Workbook

Year

Organisation

Strategic Planning Workbook

Introduction

This workbook is a guide to putting together a strategic plan. This is a process that documents how and what you will do to achieve your organisational goals. Without a goal, you cannot set direction and without a compass, how will you reach your destination?



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How to use this workbook

The Strategic Planning Workbook is part of our DIY Strategic Planning Toolkit package that comprises:

- 4 x Strategic Planning Units
 - Unit 1 – Strategic Planning Overview
 - Unit 2 – Laying down the Foundations (Vision, Mission, Values)
 - Unit 3 – Gather, Analyse and Filter (environmental scan and analysis tools)
 - Unit 4 – Put together, implement and monitor your Strategic Plan
- Strategic Planning Workbook (online version and downloadable document)
- Strategic Plan Template (online version and downloadable document)
- Strategic Planning Timeline

This workbook has been designed to step you through the process of putting together a strategic plan. It comprises instructions, examples and exercises to fill in as you go through the accompanying online units.

The workbook follows the flow of the units, allowing you to define your Vision, Mission and Values (Unit 1) alongside the process for the environmental scan (Unit 2). Alternatively, you may wish to prioritise the environmental scan (Unit 2) and save Unit 1 to work through as part of a face-to-face workshop where you will review the findings of the environmental scan and use analysis tools to inform your priorities for the next three or five years.

At the back of the manual is a template for putting together the components of your Strategic Plan, ready to use. This checklist reflects the **Strategic Plan Template** for you to use as the foundation document for putting together your strategic plan as you go along.

The Strategic Planning Timeline is a suggested tool to help you through the process.

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Strategic Planning Overview

Refer to Unit 1

Why have a strategic plan?

(Refers to Unit 1 – Strategic Planning Overview)

Before you begin, consider the following questions:

1. What is a strategic plan?
2. Why have one?
3. Why must we be strategic?
4. What will happen if we don't have one?

For a strategic plan to be effective, you must understand its purpose, why it is important to have one and the difference it will make to your organisation.

Consider the following quote (attribute to Benjamin Franklin):

“If you fail to plan, you plan to fail”

Having worked with a wide variety of organisations, some with strategic plans and others without: Irrespective of whether you are a business, a charity or a sporting group, having a documented plan for the next three-years that you 'own', increases your focus and can catapult you along your journey to success.

Here are two examples of the kinds of clients we come across. Which one are you?

Client A – Plan in place	Client B – No plan in place
<ul style="list-style-type: none"> ✓ Used for negotiating with government and other stakeholders– able to talk with confidence about achievements - recently announced ongoing funding for interactive play group ✓ Used as evidence of an organisation that was working towards goals – attracted charity, Public Benevolent and Deductible Gift Recipient (in the not-for-profit sector) statuses ✓ Used content to support funding applications ✓ Added the plan as evidence for funding applications – got \$1m over two grants ✓ Achieved (documented) targets 	<ul style="list-style-type: none"> ✗ Internal conflict - board v manager v staff ✗ Inconsistent practices – scatter gun, chasing yellow taxis (every opportunity without considering impacts) ✗ Ever decreasing circles, not reaching out to new possibilities ✗ Dysfunctional board

These are not extreme examples – they are quite common

The Strategic Planning Cycle



Strategic Planning Principles

- ✓ Putting together a strategic plan is a process
- ✓ It must be owned by the governing body
- ✓ It must reflect the changing environment
- ✓ It must be built on Vision and Mission
- ✓ Within the plan, there will be Strategic Goals with Key Performance Indicators
- ✓ The Strategic Plan is the 'mother' of plans

The Strategic Plan considers:

- Who we are, what we do and what we have achieved?
- The external environment which impacts on our programs and services
- Our changing community
- Government, community and other stakeholders that influence what we do, and how we align to their priorities
- Who else is in the community that we could partner with to add value for our clients, community and stakeholders?
- How we can strengthen our position in the community through partnerships, leadership and best practice
- The availability of resources including finances, human resources, facilities, time and relationships

The Five Stages of the Strategic Planning Process

1. Clarify your Vision, Mission and Values
2. Gather, analyse and filter information
3. Put together a strategy
4. Implement
5. Monitor and evaluate



Laying down the Foundations

Refer to Units 2 and 3

Pre-amble

Unit 2

Organisational Details

The first part of your plan is a snapshot of your organisation at the time of putting together the plan. It includes your organisation contact details, board structure, number of members, positions and an overview of the programs and services you provide.

Purpose

Included in the snapshot is the Purpose of the organisation. Normally this is the Purpose as defined in the Rules or Articles of Association.

If you are not sure what your organisational Purpose is, contact the body that approved your status as a not-for-profit, charity or business.

Exercise 1

Define your Purpose

Stage 1 - Clarify your Vision, Mission and Values

Vision

When putting together a plan, you are working towards a destination. That destination is your Vision. It is the ideal state your centre wishes to achieve for itself or the community.

It is inspirational and motivational.

It is written as if you were in the future but in the present tense – treat as though in the present tense (maybe 10 years from now) and your message represents the achievements of your Purpose.

A classic Vision statement was Bill Gates Vision in 1980 of “A computer on every desk, and in every home, running Microsoft software”. He made it Microsoft’s mission to make that happen.

Here are other examples:

Tesla - To create the most compelling car company of the 21st century, by driving the world’s transition to electric vehicles.

Google - To provide access to the world’s information in one click

The Walt Disney Co – To be one of the world’s leading producers and providers of entertainment and information

Barnardo’s Australia – All children and young people have caring families in which they can grow safely and fulfil their potential. Families, children and young people are valued and supported by quality services and engaged communities.

World Health Organization 0 A world in which everyone can live healthy, productive lives regardless of who they are or where they live

Australian Red Cross – To improve the lives of vulnerable people in Australia and internationally by mobilising the power of humanity.

You have the choice – your organisation or the community/customers you serve.

Here are a couple of examples of Vision statements for small community organisations:

1. We are at the heart of an active, vibrant, engaged community.
2. The central point for social, cultural and creative connections
3. Connected community

Exercise 2

Develop a Vision for your organisation (refer to your Purpose)

Mission

Your Mission statement is the doing. How you will achieve your Vision. When putting together your Mission Statement, consider the following:

- What we do?
- Whom we serve?
- How do we serve them?

The Mission Statement is 'how'. It is the driver to the destination that is the Vision. Can it be articulated by everybody in the organisation when asked?

The best Mission statements are concise enough to be owned by everybody involved – board, staff and volunteers.

It must also be SMART

- ✓ Specific
- ✓ Measurable
- ✓ Achievable
- ✓ Relevant
- ✓ Time-bound

Here are some examples of Mission statements:

Tesla – to accelerate the world’s transition to sustainable energy

Google – to organise the world’s information and make it universally accessible and useful

The Walt Disney Co – To entertain, inform and insure people around the globe through the power of unparalleled storytelling, reflecting the iconic brands, creative minds and innovative technologies that make ours the world’s premier entertainment company.

Barnardo’s Australia builds relationships between children, young people, their families and the community. We advocate for children and young people and contribute to community knowledge about their issues

World Health Organization - The objective of WHO is the attainment by all peoples of the highest possible level of health. Health, as defined in the WHO Constitution, is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity.

Australian Red Cross – To be a leading humanitarian organisation in Australia, improving the lives of vulnerable people through programs delivered and promotion of humanitarian laws and values.

Other examples (community sources):

1. “To empower individuals and the community XXX communities to raise their potential”
2. “connecting individuals and communities by providing opportunities and the environment for lifelong learning, health and wellbeing and community development”
3. “Through partnerships, provide programs, services and information which meet the changing needs of the XYZ community”

Exercise 3

Develop a Mission for your organisation (refer to your Vision)

Values

Values are the core principles that guide and direct the organisation and its culture. The Values Statement incorporates expected behaviours.

Values:

- ✓ Translate into expectations of how people will behave
- ✓ Inform code of ethics and procedures
- ✓ Can be used for performance management – committees, staff and volunteers
- ✓ Reflect the ideal organisational culture

Examples of values:

- | | |
|---|--|
| <input type="checkbox"/> Accountability | <input type="checkbox"/> Financial freedom |
| <input type="checkbox"/> Achievement | <input type="checkbox"/> Fun |
| <input type="checkbox"/> Adventure | <input type="checkbox"/> Honesty |
| <input type="checkbox"/> Authority | <input type="checkbox"/> Justice |
| <input type="checkbox"/> Autonomy | <input type="checkbox"/> Leadership |
| <input type="checkbox"/> Commitment | <input type="checkbox"/> Learning |
| <input type="checkbox"/> Compassion | <input type="checkbox"/> Loyalty |
| <input type="checkbox"/> Challenge | <input type="checkbox"/> Respect |
| <input type="checkbox"/> Community | <input type="checkbox"/> Success |
| <input type="checkbox"/> Creativity | <input type="checkbox"/> Teamwork |
| <input type="checkbox"/> Experience | |

Your Values Statement is not just something that looks good on the wall in the reception. It is a living embodiment of **who** you are as an organisation. Your Values must be owned and demonstrated by everybody in the organisation, top-down, bottom-up. It permeates the way the board acts, expectations of staff and volunteers and also informs performance and culture of the organisation.

Focus on the most important values that reflect who you are and associate with them the behaviours you expect people to display every day.

Here are examples of Values Statements with corresponding Behaviours:

Respect

We are accepting of individual diversity, appreciating people for who they are and demonstrate respect by listening, understanding and confidentiality.

Efficiency

We work together to make best use of our resources to be accountable and achieve results

Flexibility

We foster the ability to move, grow and change, continually improving our customer service and being open minded to the needs of our community

Exercise 4

Draft a Values Statement for your organisation

Value	Behaviour(s)

Workshopping Values

Your board members may approach values as individuals and the resulting exercise will be confused if not managed well. Here is a suggested procedure for gaining consensus on organisational values:

1. Refer to your Vision and Mission Statements for inspiration
2. Brainstorm possible values (use post-it notes to identify maximum options)
3. Eliminate values that least fit with the Vision and Mission (some values may turn out to be behaviours)
4. From the remaining values, prioritise – reduce again if needed
5. identify behaviours you would expect that reflect the values

If you are associated with a larger entity, ensure there is a fit with their Values Statement.

Stage 2 – Gather, Analyse and Filter Information

Refer to Unit 3

You can set about writing your plan for the next three years without any consultation with the outside world – effectively you will be planning in a vacuum. You will not be taking into account:

- feedback that could help improve what you do, so that you provide an even better service and results
- What's going on around you now and in the future that could make or break what you do
- Others out there who could add value to what you do and help get you closer to achieving your vision in a lot faster time

An important part of the strategic planning process is to gather, analyse and filter information both internal and external to the organisation, in order to make informed decisions

Environmental Scan

The Environmental Scan documents the ongoing tracking of trends and occurrences in an organisation's internal and external environment.

It is an important contributor to an effective strategic plan. Why?

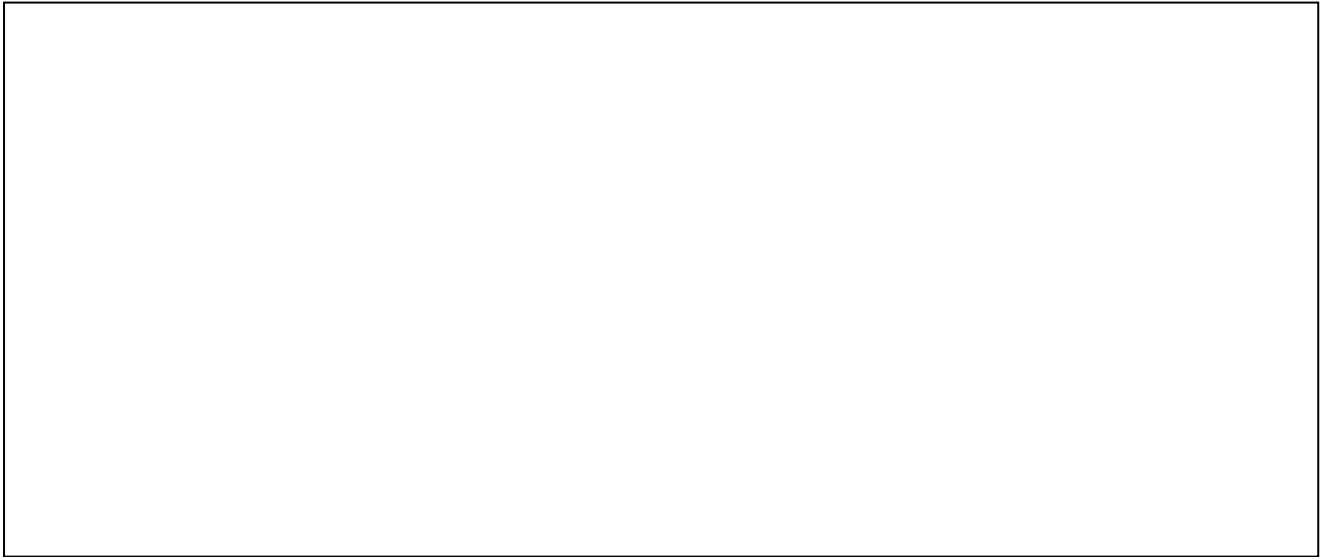
Sources of Information

Here are examples of useful resources available to Australian organisations. There should be equivalents in other countries:


Evidence	Resource	Location
Demographic – community profile – general, aboriginal, time series	ABS Community Profiles	https://www.abs.gov.au/websitedbs/censushome.nsf/home/communityprofiles?opendocument&navpos=230
Demographic – persons, families and dwellings	ABS Quickstats	https://www.abs.gov.au/websitedbs/censushome.nsf/home/quickstats?opendocument&navpos=220
Demographic – census, updated populations, projections, social atlas, economic	Id Profile	Search engine url – id (location) e.g. id Shepparton
Government policy, research, plans, reports etc – state government	State governments	www.data.state acronym.gov.au e.g. www.data.vic.gov.au www.data.nsw.gov.au
Government policy, research, plans, reports etc – federal government	Australian government	www.data.gov.au
Health and wellbeing plans	Councils	Any council website
Multicultural – data, projections, reports, plans	State Multicultural departments	Direct to state multicultural department websites
Social and health research reports	Charitable organisations etc.	Check out websites of charities and charitable foundations that commission research
Local labour market trends	Labour Market Information Portal	http://lmip.gov.au/maps.aspx#layer=LabourForceRegions

Exercise 5

- (a) List examples of internal sources of trends and occurrences relevant to your organisation



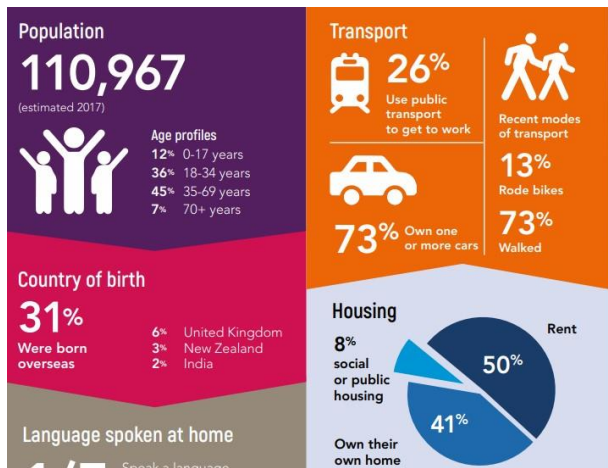
- (b) List examples of external sources of trends and occurrences relevant to your organisation



Gather data and summarise in your Strategic Plan. Consider the ease at which people read and understand information. You may wish to summarise data and prepare a comprehensive data document as an appendix or present the information as an infographic.

Examples below:

Infographic



Source – City of Port Phillip Council Plan 2017-2021

Tabular

Data	X community	Comparison area	Comments
Population	1,861	28,559	Slight growth since 2011 (+20)
Ages			
0-4	0-4 89 (4.8%)	5.4%	Reduction in number of babies and pre-schoolers since 2011.
5-11	5-11 176 (9.5%)	8.8%	
12-17	12-17 145 (7.8%)	7.5%	There are more empty nesters and retirees (60-69) and seniors than in 2011.
18-24	18-24 84 (4.5%)	6.7%	
25-34	25-34 115 (6.2%)	9.4%	
35-49	35-49 384 (20.8%)	18.3%	
50-59	50-59 310 (16.8%)	14.4%	
60-69	60-69 309 (16.7%)	13.7%	
70+	70+ 238 (12.9%)	15.9%	

Researching your community

Whilst gathering evidence that can be used to inform the Strategic Plan, consider **what's going on in your own backyard**. There is no point in looking further afield if you are not servicing your local community.

Questions to consider:

- ✓ What is the profile of your community/customer base?
- ✓ What do they want/need?
- ✓ What are they doing / to get what they want?
- ✓ Who are the key players/stakeholders?
- ✓ What are their priorities?
- ✓ What are they doing?
- ✓ What are the alternatives?

If you don't know the answers to these questions, now is a good time to ask.

Example

XX organisation was preparing for a strategic planning working. They limited the attendees to board and manager, yet there were others who wanted to have their say. It was suggested the community be given the chance to have their say. This was achieved via a Google Survey. The organisation received 40 responses during quick turn-around of a week, by asking the following questions:

1. What does XX do?
2. What does XX do well?
3. What is currently missing that XX could incorporate into its programs and services?
4. Where do you see the community in 3-5 years' time?
5. What could XX do now to meet the opportunities or challenges facing the community in 3-5 years?

Analysis Tools

When you have gathered the information, become familiar with what it is telling you and the impact on your organisation. Two common tools for analysing and ordering this information are the SWOT and PESTLE (along with TOWS and External Forces):

SWOT

Strengths, Weaknesses, Opportunities and Threats

Strengths and Weaknesses refer to internal to your organisation

Opportunities and Threat refer to external to your organisation

Here is an example of a SWOT template – fill in ideas about what could be included in each box:

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

Take some time to consider what these indicators are telling you.

If you want to take this to the next stage, the TOWS template enables you to cross-refer the S W O T elements to come up with ideas and solutions.

SWOT/TOWS

1. List your Strengths, Weaknesses, Opportunities and Threats in the corresponding outside boxes (A)
2. Cross reference any or all of the ideas identified in (A) in the boxes (B) (see sample arrows)
3. Repeat by brainstorming other possible strategies

	Strengths (A)	Weaknesses (A)
Opportunities (A)	Strengths/ Opportunities (B)	Weaknesses/ Opportunities (B)
Threats (A)	Strengths/Threats (B)	Weaknesses/ Threats Optional (B)

Weaknesses/Threats is optional because it can be limited to a defensive strategy. Weakness could be inability to use social media, threat could be competition from other facilities.

Examples

An identified Strength could be, modern facility with excellent facilities. An Opportunity could be – growing number of refugees in the area, They may be looking for somewhere to hold meetings, English lessons etc. Then the Strengths/Opportunity could be to develop relationships with community leaders to encourage usage of the centre (meetings could be at night as well as during the day) – think strategically.

For a business – an identified Strength could be specialist information technology skills and an Opportunity could be the introduction of new technology to improve efficiencies in a certain industry. The interface between Strengths and Opportunities could then be to develop and sell software to this industry sector and train them to use it in their businesses.

PESTLE

PESTLE is an acronym for: Political, Economic, Social, Technological and Legal. These are trends in the macro environment that may impact on the organisation and should be considered:

Political
Economic
Environmental
Legal
Social
Technology

External Forces

Also, known as Porter's Five Forces, External Forces enables you to consider:

- The bargaining power of suppliers
- Bargaining power of customers
- Rivalry among existing competitors
- Threat of substitutes
- Threat of new entrants

Whether you are a business, a not-for-profit or a group, there are external forces that will impact on what you do. Consider these in your analysis.

Objective Setting

The analysis stage is a transition stage in the strategic plan process.

It is the nexus between gathering of the data and filtering this information to an easily understandable picture of the current and future internal and external environment that impacts on the organisation.

This is the point at which a representation of the organisation is trusted to evaluate and decide what information is relevant and the implications for the future sustainability of the organisation.

The representation can be simply the Board/governing body (it is their responsibility to set the direction of the organisation) or may include staff, volunteers and/or community stakeholders to enrich the next stage – the plan for the future.

Where possible, provide information ahead of time so that people attend the planning meeting well informed.

Brainstorm

Once people have this information what do they do with it? There are many potential futures.

One useful exercise is to get people at the meeting to write a letter, 3 years into the future, to a friend about the organisation or community. This is based on the findings explored by the group from the information supplied.

From these possible futures:

1. craft as a group a vision for the next three years that aligns to your organisational Vision and Mission
2. Decide what needs to happen in order to achieve the three-year result (think beyond maintaining the status quo)
3. Organise into themes or objectives with key messages

From the analysis, identify five strategic goals and objectives that you can implement over three years that support your mission and focus on achieving your future Vision. Add :

- Relevant to your Vision
- Supports the Mission
- Supports long term sustainability
- Achievable within the lifetime of the plan
- For each objective, identify an outcome statement

Examples:

Community Organisation X

Increase the diversity of programs for the community

To provide a good mix of programs for our community, including health and wellbeing, education and training pathways, social inclusion, and programs for young and old

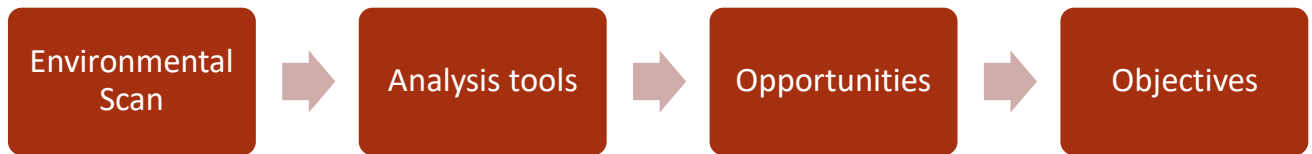
Building resilient community, businesses and employment

Initiatives developed and implemented in XXX including partnerships to strengthen community preparedness for unforeseen circumstances and emerging opportunities

Examples of focus areas for strategic objectives that relate to community organisations include:

- Partnership development
- Programs and services
- Community engagement
- Financial sustainability
- Governance
- Infrastructure

Consider:



From the findings of the environmental scan and analysis, consider 3-5 overarching goals/themes you can focus on strategically over the next three years. Translate each of these into an overall objective:

For example (using the TOWS example):

Focus Area/Goal– Community Relationships - A community centre that demonstrates and embraces diversity

Strategic Objective – build community relationships that lead to increase in usage and diversity in the centre

(This is measurable because you can have goals for 20% increase in usage per year, and/or demonstration of community diversity within the centre – e.g. the range of groups from across the community).

This Objective can be broken down further into small (sub) objectives.

Exercise 6

List 3-5 Focus Areas and Strategic Objectives based on the four steps listed above.

Stage 3 – Put together a Strategy Plan

Refer to Unit 4

Now you have carried out an environmental scan, you are ready to compile your strategic plan. The Plan consists of:

- 1 Strategic Objectives
- 2 Performance Areas, Strategies and actions
- 3 Outcomes (KPIs)
- 4 Time Frame
- 5 Risk Plan
- 6 Evaluation Plan

Strategic Objectives

See Stage 2 Objective setting.

Strategies and Actions

For each Objective and results area, strategies can be defined as 'what we want to do'. Actions are the steps to be taken to implement the strategies (see example below).

Outcomes

Outcomes are the results and measurable. Be specific about the target. This can be defined as numbers and percentages. These are known as Key Performance Indicators and are used to measure progress to success and Mission.

Time Frame

Determining the time frame to achieve results is an important component of the strategic plan and should not be overlooked. It informs the board about what needs doing and when and breaks down the process over the 3-5 years of the plan. It puts the breaks on overwhelm and ensures the process is manageable.

Exercise 7

Look at the example below and suggest KPIs

Building resilient community, businesses and employment (Objective)

Initiatives developed and implemented in XXX including partnerships to strengthen community preparedness for unforeseen circumstances and emerging opportunities **(Goal)**

Focus Area	Strategies (what we want to do)	Actions	Outcomes/Key Performance Indicators	Timeframe
Community engagement	Develop and implement a community engagement plan (who is in the area, how we interact, collaboration)	Develop and implement plan Investigate opportunities for taking part in community activities and events Explore community partnerships		
Networks and Partnerships	Strengthen participation in local networks (also relates to increasing visibility) Further develop relationships with key community stakeholders to support new initiatives that support individuals, community and business	Review current networks and stakeholders (business/community) including chambers of commerce, service groups, community groups and regional networks xxx to have a presence in networks		

Risk Plan

By the time you get to the Risk Plan, you will have decided your priorities for the next 3-5 years. Perhaps these priorities are listed as key areas, pillars, or strategic goals. How you organise your priorities (which must contribute to your overall Vision and Mission), is very much down to your team or organisational template.

Once you have broken down your priorities into measurable actions with timeframes, the next step is to plan for what could go wrong. This is risk planning.

Questions that you might consider include:

- What will happen if key people move on?
- Do we have the right skills in our board or committee to monitor and manage the plan?
- How do we afford these actions?

Obvious answers could include putting together a succession plan (incorporate in your strategic priorities). This plan will include arrangements for acquiring the skills, both internally and externally.

Some strategic priorities and actions may cause more anxiety than others. Where is the funding coming from? This will feed into the budget for the next 3-5 years. Perhaps your plan may also include a stronger focus on accessing funding or prioritising activities to high, medium or low.

A secondary risk could be that a focus on one direction may take away the resources needed for another, which could destabilise the organisation.

These are examples of potentially complex risks and may be considered a low risk in terms of occurrence, but with serious implications if not foreseen, mitigated and managed in time.

Therefore, it is important to put together a risk plan, considering:

1. What could go wrong, no matter how improbably it may seem?
2. What is the likelihood of this occurring (high, medium or low)?
3. If it does occur, what impact will it have on the organisation (describe and then categorise as high, medium or low impact)?
4. What actions or solutions could be put in place now to mitigate the effects?

Some common risks to consider:

1. The committee doesn't monitor the plan (this is a high risk as in some organisations the strategic planning exercise is a necessary evil which just needs to be put together and then left to an individual to look at from time to time if at all).
2. The plan itself might not reflect what's going on in the community – could be the result of lack of environmental scanning, or not considering the data enough when putting together the direction and strategic goals and priorities.
3. Change of key person e.g. CEO – in many small not for profits in particular, the passion of the CEO influences the direction of the organisation.
4. Things change externally that impact on the organisation e.g. changes to funding arrangements (particularly so when an organisation is dependent on grants).
5. Competition in the community or duplication of services. For instance a childcare centre may find within the three years that government support for additional 3 year kinder has led to two more centres opening locally and impacting on enrolments (in turn budget and cashflow).

Use this risk plan template to scribe your ideas. Remember, even the most unlikely risks could break an organisation if not planned for. Change is inevitable.

Exercise 9

Strategic Focus	Risk(s) – what could go wrong?	Likelihood (H, M, L)	Impact – if risk were to occur	Would the impact be: H, M or L	Mitigation – what would you do now to prevent or mitigate the problem/risk

Evaluation Plan

The purpose of a strategic plan is to manage change. How will you know that everything you have done has made a difference? In order to articulate change, you need to be able to quantify it. Thus the reason for KPIs at the planning stage.

Other factors to include:

- ✓ How will you measure progress to your Mission?
- ✓ Outcomes focus - Progress towards achievement of goals
- ✓ Capabilities – did you have the right people in place, what skills were needed
- ✓ Deviation from plan (correction)
- ✓ Changes to macro/microenvironment that might have impacted on success
- ✓ Management of risks
- ✓ Measure change (benchmark, formative and summative)
- ✓ Would these things have happened if we didn't have a plan?

A successful evaluation strategy incorporates:

1. Where you are now (benchmark) – this information is available from the environmental scan
2. Where you want to be – Objectives, goals, strategies
3. Progress to indicators – KPIs.

How:

1. Regular reports at board meetings including progress data
2. Board self-evaluation program
3. Surveys and consultations
4. Annual reviews

Stage 4 – Implement

The Direction is owned by the board and should be the focus of the board meetings. Operational actions should be delegated to the Centre Manager. It is important to separate setting the direction from operations.

The Plan informs other plans such as:

Budget

Annual Plan

Succession Plan

Manager Performance Plan

Resource Plans (human and infrastructure)

Marketing Plan

Other plans



Stage 5 Monitor and Evaluate

The strategic plan is a living organism, not to be stilled on the bookshelf or hidden in your 'inbox'. It should be used to constantly monitor you are progressing towards your goal.

Along the way:

- ✓ Establish milestones to achieving KPIs
- ✓ Monitor and adjust performance to achieve KPIs
- ✓ Review at 18 months – update if required
- ✓ Gather evidence of change/achievement
- ✓ Measure – efficiency (of operations) and effectiveness (of programs and services)
- ✓ Use data and achievements to inform the next Strategic Plan

Evaluation

The Strategic Plan is the Blueprint for how the organisation will journey towards achieving its Vision through its Mission.

The Board will ensure that the organisation is being steered towards achieving the outcomes outlined in the Strategic Plan, using the KPIs as measures.

Like any ship, the steerage aims to ensure the safe passage of the organisation. The 'crew' are the staff and volunteers who operationalise the plan. The Manager/CEO will report on progress - usually monthly) with an interim evaluation around 18 months into the Strategic Plan.

Benchmark evaluation

In order for the evaluation to make sense, a benchmark exercise will take place at the start. Where did the figures xx% increase in xyz come from? What is the baseline figure? What organisational data is being used at the start?

Other questions will we consider include:

1. Are we clear about our strategic priorities?
2. Are our KPI's measurable?
3. How do the KPI's contribute toward our Mission?
4. How efficient are we as an organisation?
5. How effective are we as an organisation?

Formative evaluation

At the 18-month mark, or another designated time) the Strategic Plan will be reviewed to ensure it is still on trajectory.

Questions to consider:

1. Are we still working to the Purpose of our organisation?
2. Are we still clear about our strategic priorities?
3. Have any of our strategic priorities changed?

4. Are we falling behind on any of our targets and what do we need to do to make up the difference?
5. What internal factors are challenging our ability to achieve our outcomes?
6. What external factors are challenging our ability to achieve our outcomes?

Summative evaluation

At this stage, we will revisit the questions in both the benchmark and formative evaluation stages. Revisit them from the perspective of the end result v the original direction.

Questions to consider:

1. What went well?
2. What could we have done better?
3. What have we learned?
4. What difference did we make (contribution to Mission)?
5. Did we improve our organisational efficiency?
6. Did we improve our organisational effectiveness?

Remember to consider:



The Next Step

Use this to guide you through the development of a strategic plan. Once completed, be creative and transfer the key Objectives and Outcomes, Vision, Mission and Values Statement to an **A3 Visual at-a-glance document** that can be placed on walls and referred to as a **quick reference guide**.

The Strategic Plan must be owned by the governing body and the focus of board/committee meetings. The Plan is a living document that informs:

- Budget
- Annual plans
- Succession Plan – board and staff
- Manager Performance Plan
- Resource plans (human and infrastructure)
- Marketing Plan
- Other plans.

A sample template for the Annual Plan is included in the Template to get you started on the next step of your journey. Bon Voyage.

APPENDIX 1 – Strategic Plan Checklist

- Front page – Name of organisation, Title, Timeframe of Plan
- Welcome message
- Contact information
- Contents
- Purpose statement
- Vision
- Mission
- About the organisation – who you are and who you service
- Days of operation
- Board/Committee of Management Structure
- Overview of staff and volunteers
- Values Statement
- Recent achievements
- Overview of programs, services and activities
- Situation Analysis (Environmental Scan)
- Demographic and Environmental Data
- Stakeholders
- Other important data
- Analysis
- SWOT
- PESTLE
- Findings

- Strategic Objectives / Goals
- Breakdown of Objectives into Strategies, Actions, KPIs and Timeframes
- Risk Analysis
- Evaluation Plan