

Strategic plan template

Role of the board

A strategic plan will clearly articulate how the organisation will achieve its purpose. Furthermore, a good strategic plan will also set out a series of measurable objectives to ensure that the plan can be effectively and appropriately monitored.

The extent of the strategic document is less relevant than how the organisation, staff and stakeholders engage with the plan and its elements.

It is useful to begin by identifying how the plan is to be used:

- How will it be communicated internally?
- Will it be central to all decision making and how the organisation operates?
- Will it form part of employee/volunteer induction plans and subsequently performance metrics/reviews?
- Will it be available externally, for example on the organisational website, for all member/stakeholder access?
- Will it be used to show that the board has thought about the direction of the organisation and how its goals will be achieved?
- Will it be used to inform external stakeholders that the organisation is willing to be transparent and accountable?
- Will it be used to demonstrate there is a planning process within the organisation, which underpins good governance?

How an organisation anticipates using the strategic plan will inform the best way to present information and what level of detail to include.

Plan structure	Questions that will inform the plan
<p>Purpose or mission</p>	<p>Why does the organisation exist? In what business is the organisation in?</p> <p>This statement needs to be in line with the organisation’s constitution.</p> <p>It is useful to keep this statement brief and high level, as more detail is added further down the strategy hierarchy.</p> <p>Examples:</p> <p><i>“To reduce the impact of all cancers for all Victorians.”</i> Cancer Council Victoria, SP 2013-2016</p> <p><i>“To reduce premature death and suffering from heart, stroke and blood vessel disease.”</i> Heart Foundation, SP 2013-2017</p> <p><i>“To achieve success with Australian teams, to grow the game of hockey in Australia, to govern the game of hockey in Australia.”</i> Hockey Australia, SP 2014-2018</p> <p><i>“Our mission is to stop the degradation of the planet’s natural environment and to build a future in which humans live in harmony with nature, by:</i></p> <ul style="list-style-type: none"> • <i>conserving the world’s biological diversity</i> • <i>ensuring that the use of renewable natural resources is sustainable</i> • <i>promoting the reduction of pollution and wasteful consumption.”</i> World Wildlife Fund, www.wwf.org.au
<p>Vision</p>	<p>What does the organisation want? What does the organisation want to look like in three to five years? How will the organisation achieve its purpose?</p> <p>Examples:</p> <p><i>“Our vision for this strategic plan will be achieved by:</i></p> <ul style="list-style-type: none"> • <i>Consistent Australian team performance and team success at 14 benchmark events.</i> • <i>Stronger business model by sustained profits through diversified revenue.</i> • <i>Increased participation across all levels of hockey.</i> • <i>Highest standard of governance across whole of sport.”</i> Hockey Australia, SP 2014-2018 <p><i>“To be an organisation that excels in the provision of innovative, effective and efficient benevolent services, care and accommodation for the aged.”</i> Goodwin Aged Care, SP 2014-2020</p>
<p>Values or guiding principles</p>	<p>What are the key values that will underpin every part of the organisation? In order for an organisation to engage with its values/guiding principles, it’s important to limit the values to only three to four.</p> <p>Values that are typically used include:</p> <p>Honesty, transparency, accountable, ethical, evidence-based, collaborative, leadership, supportive, integrity, compassion, excellence, empowerment, multicultural, apolitical.</p>

Plan structure	Questions that will inform the plan
<p>Strategic priorities or aspirational goals</p>	<p>What are the one to three aspirational goals that the organisation wants to achieve?</p> <p>Examples:</p> <p>NDIS Ready - <i>“We will be a viable and effective organisation, delivering high quality services that people need, want and can purchase through the NDIS”.</i></p> <p>Sunnyhaven Disability Services, SP 2014-2018</p> <p><i>“We will support a global target to reduce premature deaths by 2025 by curbing chronic disease risks (including cardiovascular disease).”</i></p> <p>Heart Foundation, SP 2013-2017</p>
<p>Environment or context</p>	<p>Outline the environment the organisation operates within and provide context to what the organisation is dealing with. This could also include any challenges that this creates and how these challenges might be managed.</p> <p>Example:</p> <p>If an NFP operates within the health sector, this could include some basic statistics about the condition:</p> <p>How many people in Australia are diagnosed with the condition every year?</p> <p>How will the numbers get worse due to the ageing population?</p> <p>How will survival rates improve with better detection methods and treatment?</p>
<p>Stakeholders</p>	<p>Identify organisational stakeholders, and identify how they will collaborate and communicate.</p> <p>Your stakeholders may include:</p> <ul style="list-style-type: none"> • members; • the community; • volunteers; • research institutions; • governments (Commonwealth and state/territory); • donors; • other community organisations and partnering organisations.
<p>Goals or objectives</p>	<p>What are the four to five key goals the organisation wants to achieve in the next three to five years:</p> <p>What are the aims and key activities required to achieve the strategy?</p> <p>What are the challenges or risks?</p> <p>How will performance against these goals be evaluated/measured?</p>

Plan structure	Questions that will inform the plan
<p>Attributes and resources</p>	<p>What are the key attributes and resources the organisation will utilise to achieve the strategic plan?</p> <p>Governance – continue to improve the effectiveness and efficiency of our governance and management processes.</p> <p>Advocacy – continue to invest in policy development and advocacy.</p> <p>Evidence-based practice – always use evidence based best practice whenever possible.</p> <p>Financial resources – maintain financial sustainability. This may include:</p> <ul style="list-style-type: none"> • Identifying more efficient ways to deliver services; • Partnering with like-minded NFPs; • Prudently and effectively managing investments. <p>Staff – develop the organisational culture to enable support and development of staff</p> <p>Stakeholders – always engage with and listen to our stakeholders.</p> <p>Innovation – encourage innovation within the organisation.</p>

Engaging stakeholders

There is no right or wrong way in which to engage organisational stakeholders with a strategic plan. It is useful to get stakeholders involved by considering how the plan will be used. Each organisation has a unique culture and it’s important to reflect this culture in the strategic plan rather than assume one template fits all.

Many organisations choose to make their strategic plan widely accessible by making it available on their external website.

Doing so provides the following advantages:

- it shows the board has thought about the direction of the organisation and how it will be achieved;
- it provides easy access to stakeholders and demonstrates a willingness to be transparent and accountable;
- it demonstrates that there is a planning process within the organisation, which underpins good governance.

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