Strategic Planning
What is Strategic Planning?

An activity or process that is used to:

1. Set the direction of a Support Group/Organisation
2. Set priorities
3. Set realistic goals and objectives
4. Focus energy and resources
5. Strengthen current operations

A strategic plan is like a road map – it clearly defines the best direction for your Support Group to take in the years to come.
5 Steps to Strategic Planning

1. Clarify your Vision
2. Conduct a Needs Assessment
3. Formulate your plan
4. Implement your strategy
5. Review and Evaluate
Step 1. Clarify your Vision

To start the strategic planning process, it's essential that you and your committee have a clear and united idea of what your support group is about and what you hope it can achieve.

This clarity is what makes the development of the strategy possible.
1. A one sentence statement describing the clear and inspirational long-term desired change resulting from your Support Group.

2. Provides guidance and direction for current and future members.

3. Should be short, simple, unique and reflect your goals.

4. It is a future based statement – The Dream!
Examples of Vision Statements

**ConnectGroups:** Connected Thriving Communities

This vision statement uses carefully selected positive words that describe ConnectGroups' overarching goal. In three words it lets people know that Support Groups are all about connecting people; creating communities and ensuring that they thrive.

**Red Cross Australia:** Human dignity, peace, safety and wellbeing for all.
Developing a Vision Statement

Answer the following questions to help you develop a Vision statement for your Support Group:

1. What is the main aim of starting your Support Group?
2. What is your Support Group hoping to accomplish?
3. When your Support Group succeeds, what will be its accomplishments?
Your Purpose Statement describes what your Support Group does and who it does it for.

*Please note: The terms Purpose Statement and Mission Statement are interchangeable*
Examples of Purpose Statements

**ConnectGroups:** Connecting the community through building Support Groups that aim to combat isolation and give hope for the future.

**Red Cross Australia:** We support and empower people and communities in times of vulnerability. Our purpose is to reduce suffering across Australia and internationally through mobilising the power of humanity.
Purpose Statement

To develop your Purpose Statement, answer the following questions:

1. What does your Support Group do?
2. Who are you developing this Group for?
3. Why are you doing what you do?
Summary: Vision and Purpose Statements

- Make sure you have both a Vision Statement and a Purpose Statement.

- Your Vision Statement should focus on **tomorrow** and what you want your Support Group to become.

- Your Purpose Statement should focus on **the now and the immediate future**.

- A Clear Vision and Purpose can then provide you with the road map to develop the strategy to meet the desired goals.

- A clear Vision and Purpose will enable you to increase your membership and take your members with you on the journey.
Step 2. Needs Assessment

• A needs assessment determines the need or gaps between the current state of your Support Group and where it hopes to be – its vision and purpose.

• It will help your Support Group determine its priorities, make improvements and make those vital decisions around allocation of resources.
How to conduct a Needs Assessment

1. Get your committee together and discuss the Support Groups current strengths and weaknesses from a helicopter view

2. Conduct a review of what has been going right and wrong within the Group at a more grassroots level – find time to seek and recognise those successes however big or small

3. Determine the resources you currently have

4. Ask your members what they want from the Group (via surveys, 1:1 conversations)
Needs Assessment

Some areas of need may include:

1. Advocacy
2. Resources
3. Research
4. Increasing community awareness
5. Workforce development
6. Increasing membership
Needs Assessment

- Your Support Group should focus on a maximum of 3 activities/needs that can be realistically achieved in a 12 month period.

- Make sure that you have the appropriate resources; **people, time and finances** to achieve these activities/goals.

- Being able to celebrate success at the end of the 12 month period will motivate you continue to grow and nurture your Support Group.

*Food for thought: Trying to do too much and having minimal success will de-motivate you and your committee.*
Step 3. Formulate your plan

- Analyse the information gained from the needs assessment
- Set priorities:
  1. What does the committee wish to focus on?
  2. What is achievable?
  3. Do you have the resources to carry out the work?
  4. Do priorities align with your Support Groups Vision and Purpose?
Step 4. Implementation

• Determine the initiatives you are going to develop to get you to where you want to go?
• Who is going to carry out the work?
• How will you allocate time resources and finances?
• When will each of your initiatives be implemented?
Step 5. Evaluation and Review

Determine the effectiveness of your strategies - **EVALUATE**

1. Are the strategies you are implementing actually working?
2. Are you doing what you said you were going to do?

**REVIEW** your Strategic Plan

1. Your Strategic Plan needs to be reviewed every 6 to 12 months. *What is current now may not be current in the future.*
Summary
The Strategic Planning Process

Vision
Needs Assessment
Plan
Implement
Review

REPEAT
Summary

1. Develop your Vision and Purpose
   Work with your committee to develop a clear and united idea of what your Support Group is about and what you wish to achieve.
   This clarity is what makes the development of the strategy possible.

2. Determine Where you are
   For an accurate picture of where you are, conduct an internal and external audit of your members and key stakeholders.
   Ask what your strengths and weaknesses are.

3. Identify what is important
   Focus on where you wish to take the Support Group. What is it that you want to achieve.
   What are the resources you have and what are your priorities.
4. Determine who is accountable

Define your strategies and action plans and allocate your budgets and human resources.

How are you going to use what you have to get to where you want to go?

5. Review and Evaluate

Put processes in place to make sure you are doing what you said you were going to do and to determine if your strategies are working.

Review your strategic plan every 6 to 12 months.
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