



## Neighbourhood Houses Tasmania

# A Guide to Strategic Planning

Your House should have a strategic plan that is current, relevant and prepared with input from all key stakeholders, staff, management, committee, members and community leaders.

### What is it?

- Strategic planning is deciding which road your House wants to go down.  
If you don't plan your House's destiny and direction, over time the House will stagnate and lose relevance to the people it serves.
- Strategic planning increases the House's understanding of the changing context or environment in which it is operating.
- Strategic planning usually provides your House with its medium to long term direction (usually for the next 3 years). It concentrates on the big picture issues of the organisation, stating its overall purpose and goals it wants to achieve and the objectives and strategies to achieve those goals.
- Good strategic planning can:
  - contribute to a greater sense of purpose and accountability within your House
  - identify your strengths and weaknesses and uncover any opportunities and threats
  - ensure all stakeholders (management committee, employees, clients, funding agencies and general public) understand the purpose and future direction of the House and
  - provide broad guidelines for decision making.
- There is no "one size fits all" for strategic planning. Depending on the size of your House, strategic planning can be anything from a fairly simple process to a large complex process. There are, however, some basic guidelines to improve your chances of a successful strategic planning process.
- A strategic plan (the end result of the strategic planning process) usually includes the development of the House's vision, mission statement, goals, objectives and strategies it wants to achieve. When developing your strategic plan, ensure it is clear and able to be understood by all members of your House, funding bodies and the broader community.
- Strategic planning is really about changing attitudes and group action. The objectives you set are meant to motivate everyone in your House, to see everyone's efforts channelled in the same direction with the same broad results in mind.

## Developing the Strategic Plan

- You will need to have at least one workshop to develop your Strategic Plan and someone to drive the process. This person is called a facilitator. A facilitator is a person who has experience or training in running work groups. He or she guides the planning process. Good facilitators ensure the will of the group is expressed without influencing the group. They establish the ground rules and keep the participants on track.
- Your facilitator could be:
  - (1) an outside specialist facilitator or
  - (2) a member of the management committee or
  - (3) a member of the community who has experience in facilitating groups.
- It's usually better to use a facilitator who is not too close to the House. They are more likely to be impartial. Using an internal facilitator means that the person cannot really have input into the strategic planning process (or they may end up having too much input!!!).
- It is very important the facilitator is trusted by the group. Each participant must feel comfortable to express their opinions. The most successful strategic plans are those where all participants feel they have fully participated in the planning sessions.
- A good place to start looking for a facilitator is to contact people from other similar organisations that have developed strategic plans. When you have some names, contact the facilitators and ask them for examples of when they have facilitated strategic planning, preferably with organisations like neighbourhood houses. Also ask for names of people who can confirm that the facilitator has done a good job. If possible have representatives from your House meet with the facilitator to get a feel for the facilitator. Picking a good facilitator is the first step in successful strategic planning.
- After choosing a facilitator, the House should start to consider the following components that make up a Strategic Plan.

## What is a mission statement?

- A mission statement briefly outlines the House's purpose.
- This is a broad, general statement that usually does not change from year to year and takes into account:
  - why the House exists and its values
  - the context or environment in which the House operates
  - the values and expectations of the House's users and key stakeholders and
  - your unique purpose that sets your House apart.
- The mission statement provides the answer to the question: "What business are we in?"

Use the following questions as a guide to creating your mission statement:

1. **The purpose of the House** – Why do we exist?
2. **The business of the House** - What are the needs of the community? Who do we provide services to? Who is our target group? What goals do we pursue?

- If, at this stage, you receive some sort of consensus, stop. If not, select a number of active members to discuss the subject. Ask them to read the comments that people sent in, and note the results of the vote.
- The facilitator (preferably neutral or external to the House), guides the group to come to a consensus. This same group should then work out the vision.
- Use your mission statement. Send it out, stick it up, and talk about it.

### **Common mistakes made when creating a mission statement**

- A mission statement should not be considered a “tick and flick” exercise. It is a valuable process to embark on as a House. Allow adequate time to produce a mission statement.
- If your House’s mission statement is written for the sole purpose of looking or sounding good, it won’t provide clear directions or meaning to the employees, community and stakeholders.

### **Tips**

- Keep your mission statement short and simple.
- It must be realistic and achievable.
- Include your mission statement in promotional leaflets, funding applications, etc.
- Investigate if other Houses and organisations have a similar mission to your House and encourage collaboration to achieve your mission together.
- The House should operate according to the mission statement. All decisions and activities carried out should be based on it.

An example of a mission statement is:

*Our mission is to build the health, well-being and resilience of the people and families in our community and develop our community as a thriving, supportive and enviable place to live.*

### **Developing a vision statement**

#### **What is a vision statement?**

- Some strategic plans include a statement about their vision.
- A vision statement is a brief statement about what you would want to achieve in the very long term in a perfect world if everything goes exactly as you wish.

An example of a vision statement is:

*Ours is a strong community where all people are safe, valued and empowered to reach their potential.*

## Goals

The Department of Health and Human Services sets all Houses four goals.

These are:

- Build Community
- Support People and Families
- Enhance Participation Choices
- Local Governance and Management

These are the overall goals required for your House.

## Objectives

- Now that you have completed your mission and vision statements, and have the broad goals that you are aiming for, it's time to set the House's more specific objectives. Your objectives are the outcomes that your House is committed to achieve, taking into account the specific situation in your community.
- There are some general guidelines that will assist you in setting House objectives.
- Make sure that your objectives are closely tied to your mission statement and the goals set by the Department.
- Objectives describe the broad concerns and strategic direction relevant for the House; they are not a comprehensive listing of everything a House does on a day-to-day basis.
- Objectives communicate your House's intentions to people both inside and outside your House.
- Objectives are challenging but realistic and achievable. They reflect positive change and do not limit flexibility and creativity.
- Although objectives are often for the lifetime of the plan, (3 years) you still need to develop a procedure to monitor them and revise or rework them if the circumstances change.
- Objectives have some degree of measurability. It is possible to gauge, in a general sense, whether or not progress toward their achievement is being made.
- Objectives should be written in a way so they are easily understood.

Some examples of a House's objectives could be:

**Service Delivery** - *to provide quality services to families in our community that have been affected by family or domestic violence.*

**Governance** - *to provide staff and key stakeholders with effective and efficient management processes.*

## Developing strategies

### What are strategies?

Strategies are descriptions of how the House can meet the objectives identified by the House.

- So what are the strategies that the House is going to use to meet the House's objectives? As these are more specific than objectives, it is easier to develop strategies (sometimes called programs, activities or actions) to achieve them. Make sure these strategies are realistic and measurable. Do we have the resources (personnel, physical facilities,

training, equipment, funding, etc.) required to do this activity? If not, can we scale back activities to match available funding or can we source additional funding?

An example of strategies to meet the objectives identified earlier could be:

If an objective for Service Delivery is: *to provide quality services to families in our community that have been affected by family or domestic violence.*

Strategies for the objective could include:

- provide community awareness activities including talks at schools, posters and special activities during Family Violence prevention Week
- offer perpetrator programs, including group counselling sessions.

If an objective for Governance is: *to provide staff and key stakeholders with an effective and efficient management processes.*

Strategies for the objective could include:

- publicly advertise annual general meetings and monthly committee meetings
- provide Management Committee training sessions on financial management, roles and responsibilities and corporate governance responsibilities.

### **Ensuring your Strategic Plan works**

- Do not confuse vision, mission, goals, objectives and strategies. Ensure that everyone involved with developing the Strategic Plan clearly understands the differences.
- The Strategic Plan can be published as a booklet or a poster. This can then be used by the members of the House to follow the mission, goals, objectives and strategies proposed by the organisation in the Strategic Plan.
- Make sure there is ownership of the process by the participants and that the strategic plan is reviewed on an annual basis.
- At the end your workshop(s) and completion of your Strategic Plan, you will have done a lot of thinking about where your House is heading. You will have a blueprint (booklet or poster) on how to get where you want to go. It is now time to implement the plan, because without this stage all your good work will have been wasted.
- There are organisations littered with strategic plans that have become no more than “dust collectors”. Your Strategic Plan could be used to prop up that shaky desk leg or be a dynamic guide for your House’s way forward, embraced by both staff and the Management Committee.
- To implement your Strategic Plan will require development of an operational or action plan. The Operational Plan states who is going to do what, when, how and why to achieve the strategic direction set out in the Strategic Plan by the management committee.

derived from <http://communitydoor.org.au/voice>