# BUSINESS AND STRATEGIC PLAN

DATE:

## SECTION 1

### MISSION VISION & VALUES

|  |
| --- |
| *Our Mission* |
| Why do we exist? |
| *Our Vision* |
| What we want our business to achieve? |
| *Our Values* |
| How we will we behave? |

### EXECUTIVE SUMMARY

|  |  |
| --- | --- |
|  | |
| **Purpose and use** | Why was this plan created and how will it be used? |
|  | |
| **Target Audience** | Who should read this plan? |
|  | |
| **Plan Development** | How was this plan formulated? (e.g., research, consultation conducted) |
|  | |
| **Current Position** | (Achievements, context and challenges, strategic directions) |
|  | |

### THE ORGANISATION IN CONTEXT

|  |  |
| --- | --- |
|  | |
| **Development of the Organisation** |  |
| History |  |
| Achievements to date |  |
| **Services (Overview)** |  |
| Target groups |  |
| Type of service |  |
| Levels of service |  |
| Recognition |  |
| Partnerships |  |
| Initiatives |  |
| Funding |  |
|  |  |
| **Strategic Directions** |  |
| Planning processes |  |
| Strategic Plan  Core Outcomes |  |

### ORGANISATION STRUCTURE

|  |  |  |  |
| --- | --- | --- | --- |
|  | | | |
| **Management Structure** | What are the responsibilities and authorities  of each management role in the organisation? | | |
| Role | Responsibilities | Authorities | Quals / Experience |
| CEO / Director |  |  |  |
| Service Manager |  |  |  |
| CFO | Accounts, projections, financial reports |  |  |
| External Partners (e.g.,Consultants) |  |  |  |

### ORGANISATIONAL CHART

(INSERT HERE)

### SWOT ANALYSIS

|  |  |  |
| --- | --- | --- |
| **Strengths, Weaknesses, Opportunities and Threats** | | |
|  | **Helpful to achieving the objective** | **Harmful to achieving the objective** |
| **Internal Origin**  (attributes of the organisation) | **Strengths** | **Weaknesses** |
| **External Origin**  (attributes of the environment) | **Opportunities** | **Threats** |

### STRATEGIC PLAN

|  |  |  |
| --- | --- | --- |
|  | | |
| Goal | Priorities | KPI |
| *Example* | Priority 1 | KPI 1 |
|  | Priority 2 | KPI 2 |
| *(Add more lines as needed)* | Priority 3 | KPI 3 |
| Goal | Priorities | KPI |
|  |  |  |
|  |  |  |
|  |  |  |
| Goal | Priorities | KPI |
|  |  |  |
|  |  |  |
|  |  |  |
| Goal | Priorities | KPI |
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| Goal | Priorities | KPI |
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| Goal | Priorities | KPI |
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|  |  |  |
| Goal | Priorities | KPI |
|  |  |  |
|  |  |  |
|  |  |  |

### MARKETING AND COMMUNICATIONS

|  |  |  |  |
| --- | --- | --- | --- |
|  | | | |
| Target | Aim | Strategy | Time Frame |
| NDIS Participants |  |  |  |
| Referrals Network |  |  |  |
| Community |  |  |  |
| Other |  |  |  |

### FINANCIAL MANAGEMENT

|  |  |
| --- | --- |
|  | |
| **Current Financial Position** | (income sources and levels; main expenditure categories and levels; any other relevant analysis of income and expenditure; general financial health of organisation such as liquidity ratio, adequacy of reserves etc.; patterns or trends over time) |
| Income sources: |  |
| Income level: |  |
| Expenses (categories): |  |
| Expenses (level): |  |
| Other relevant information: |  |
| **Financial Accountabilities** | (how accounts and budgets are prepared, monitored, managed and audited – demonstrating effective financial management processes) |
| Accounts prepared by: |  |
| Budgets prepared by: |  |
| Financial Management by: |  |
| Audited by: |  |
| **Financial Forecast** | (analysis of the financial impact of any planned change of growth, or of predicted cost increases) |
| Projected cost increases: |  |
| Projected costs to fund growth: |  |
| Projected income with growth: |  |
|  |  |

## SECTION 2

### PARTICIPANT UNDERSTANDING

|  |  |  |  |
| --- | --- | --- | --- |
| **SUPPORTING PARTICIPANT UNDERSTANDING** | | | |
| Issue | Strategy 1 | Strategy 2 | Strategy 3 |
| Information and Privacy | | | |
| How and why information is collected, used and disclosed | e.g.: Inform during consent process | Welcome Pack | e.g.: Staff training and checklist. |
| When information might be shared without their authorisation |  | Welcome Pack |  |
| Right to confidentiality of personal information. |  | Welcome Pack |  |
| Right to access their information |  | Welcome Pack |  |
| Right to withdraw or amend consent |  | Welcome Pack |  |
| Service and Supports | | | |
| Supports provided |  |  |  |
| Details of the service agreement |  |  |  |
| Fees and conditions of service |  |  |  |
| Service entry and exit procedures |  |  |  |
| Reasons why supports might be withdrawn |  |  |  |
| The content of their support plan |  |  |  |
| Right to participate in developing their support plan |  |  |  |
| Right to make informed choices, exercise control and maximise their independence |  | Welcome Pack |  |
| Right to the dignity of risk in decision making |  |  |  |
| Right to have a support person present |  | Welcome Pack |  |
| Right to access advocates |  | Welcome Pack |  |
| Right to express preferences including attributes of support workers |  |  |  |
| Complaints and Feedback | | | |
| Lodging feedback and complaints, |  | Welcome Pack |  |
| Complaining to external bodies. |  | Welcome Pack |  |
| Incident management |  | Welcome Pack |  |
| How incidents involving them have been managed. |  |  |  |

### PARTICIPANT ENGAGEMENT

|  |  |  |  |
| --- | --- | --- | --- |
|  | | | |
| **Area of Engagement** | **Current Service Model** | **Improvements Identified** | **Strategies** |
| Development and Delivery of Supports | | | |
| Information/resources |  |  |  |
| Communication styles |  |  |  |
| Establishing goals |  |  |  |
| Personal Preferences |  |  |  |
| Supporter engagement |  |  |  |
| Cultural or religious preferences |  |  |  |
| Staff Training |  |  |  |
| Provider Governance | | | |
| Information/resources |  |  |  |
| Advisory role |  |  |  |
| Client Staff Forum |  |  |  |
| Feedback Mechanism |  |  |  |
| Satisfaction Survey |  |  |  |
| Staff Training |  |  |  |
| Addressing Complaints and Grievances | | | |
| Information |  |  |  |
| Investigations |  |  |  |
| Communications |  |  |  |
| Staff Training |  |  |  |
| Engaging with Family and Community | | | |
| Information/resources |  |  |  |
| Network |  |  |  |
| Communication |  |  |  |
| Staff Training |  | | |
| Culture and Beliefs | | | |
| Information/resources |  |  |  |
| Client options |  |  |  |
| Community network |  |  |  |
| Staff Training |  |  |  |

### MEETING PARTICIPANT NEED

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | | | | | | | |
| **Current Capacity** | How do our services meet the needs in our area? | | | | | | |
| Current Support Provided | | No. of clients | Required Quals / Exp | Hrs per week | Available Staff Hrs/week | % Capacity | Expected Growth |
|  | |  |  |  |  |  |  |
|  | |  |  |  |  |  |  |
| *Add lines as needed* | |  |  |  |  |  |  |
| **Current Strategy** | What are our current goals and what are we doing to meet them? | | | | | | |
|  | | | | | | | |
| **Short-term Strategy** | What must we do now to meet need given current growth rates? | | | | | | |
|  | | | | | | | |
| **Long-term  Strategy** | How can we prepare for current growth rate and trends? | | | | | | |
|  | | | | | | | |
| **Unmet Need** | Are there unmet needs in our area? | | | | | | |
| Unmet Support Required | | No. of clients | Required Quals / Exp | Hrs / week | Available Staff Hrs/week | % Capacity | Expected Growth |
|  | |  |  |  |  |  |  |
| *Add lines as needed* | |  |  |  |  |  |  |
| **Determining Need** | What strategies do we use to determine and prioritise further needs? | | | | | | |
| E.g.: NDIS Demand Map: <https://blcw.dss.gov.au/demandmap/> , Waiting List and Service Refusals Register, Consultation with staff, Client interviews | | | | | | | |
| **Current Strategy** | How do we manage the need we can’t currently meet? | | | | | | |
|  | | | | | | | |
| **Short-term Strategy** | What can/must we do now (in order to implement further services and meet further needs? | | | | | | |
|  | | | | | | | |
| **Long-term  Strategy** | What can/must we do to achieve our goals in the long term? | | | | | | |
|  | | | | | | | |

### TRAINING & DEVELOPMENT STRATEGIES

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| --- | --- | --- |
|  | | |
| Current Need – Training Strategies | | |
| Induction process |  | |
| Induction process – short-term staff and volunteers |  | |
| Online training |  | |
| External training |  | |
| In-house training |  | |
| Resources |  | |
| Use of team meetings |  | |
| Use of surveys |  | |
| Performance Monitoring |  | |
|  |  | |
| Planned Expansion of Services – Training Strategies | | |
| Planned support | Training mode | Comments |
| E.g. Aboriginal and Torres Strait Islander Cultural Competency | Online training | e.g. http://www.workingwithindigenousaustralians.info/ |
| In-house training | e.g. delivered in-house in cooperation with local Elders and Indigenous Health Service |
| Resources |  |
| Team meetings | e.g. bi-monthly activities |
| Outsource |  |
|  |  |
| Comments | e.g. Management Committee to train prior to commencement with staff. | |
|  | Online training |  |
| In-house training |  |
| Resources |  |
| Team meetings |  |
| Outsource |  |
| Outsource |  |