



Strategic Planning Guide

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Using this Guide

This Guide has been developed to help organisations operating within the NDIS develop a strategic planning framework to satisfy the NDIS Quality and Safeguards Commission (QSC) strategic and business planning Practice Indicator.

This document goes beyond the development of a strategic plan to understand how the process of planning can be integrated into day-to-day business operations and Quality Management Systems (QMS).

The Guide refers to a number of external links and resources which are provided only for your consideration and are not intended as endorsements or business advice.

Strategic Planning

When we think of strategic planning, we often ready ourselves for a day of facilitated planning for organisational growth over the next one to five years. It's the time of year when the board (if you have one) and the executive meet to set market share and growth targets. For some, a focus on vision and mission informs their strategy, while for others the current and projected state of the sector leads their thinking. For all, however, the result is a strategic plan outlining how the organisation will create value in the future. This may include an intention for growth or sometimes consolidation for the next period.

But the plan is only a small part of the picture, one that is often lost in day to-day business activities and then pulled out and dusted off, once a year, at audit time and the end of the planning cycle, when frenzied activities begin.

A strategic planning framework removes the last-minute panic from planning and, when integrated into business and QMS activities, becomes a business-as-usual process that is much more than simply developing a plan and facilitating a day of “dreaming”.

Why Plan?

As registered NDIS providers, organisations have obligations to deliver supports that are “overseen by robust governance and operational management systems”, including ensuring that “strategic and business planning considers legislative requirements, organisational risks, [and] other requirements related to operating under the NDIS”.¹

But planning is so much more than meeting the QSC requirements.

Planning is an important business process, and both business and strategic plans will assist you to manage the future relevance, endurance, and viability of your business. Planning is your roadmap to create sustainable value and make a powerful impact.

Planning (both the process and the plan that results from it) can help an organisation to:

- ✓ Provide clarity of purpose and identity
- ✓ Reaffirm and validate its vision and mission
- ✓ Set a direction aligned with the organisation’s vision and mission
- ✓ Convey to all audiences the values and behaviours the organisation believes are important
- ✓ Set the organisational tone and culture
- ✓ Bring people together with a shared purpose to achieve the organisation’s strategic goals
- ✓ Prioritise what needs to be done
- ✓ Identify what will be important in the future
- ✓ Identify and mitigate future risks

¹ Schedule 1, Part 2 Provider governance and operational management, NDIS (Provider Registration and Practice Standards) Rules 2018.

Strategic Planning Models

There are almost as many strategic planning models as stars in the sky (well, maybe not quite, but you get the idea). Pick a model that suits the size of your business and works well with your culture. Here are a few links to get you started, but you can also model an approach that works for you – don't get stuck in models that won't work for your business culture!

- [Balanced Scorecard](#)
- [Hoshin Planning](#)
- [Goal-Based Strategic Planning](#)
- [PATH \(Planning Alternate Tomorrows with Hope\)](#)

Strategic Plans

Strategic plans can take the form that best aligns with your business, culture, and needs. There are almost as many plan templates as planning models on the internet. Below are links to some free templates.

- [FormSwift](#)
- [Cascade](#)
- [ClearPoint Strategy](#)

One-page strategic plans are extremely popular and can provide a simple visual plan that is easily shared and communicated to all stakeholders.

Here are a couple of examples:

- [Template.net](#)
- [OnStrategy](#)

Strategic Planning Framework

Developing a framework to support business and strategic planning ensures that the data and knowledge that organisations collect can be used to inform and drive planning. A framework arranges the activities, registers, data inputs, and knowledge into a structure that can be time framed.

An embedded approach to planning means:

- ✓ Customers, stakeholders, and staff are familiar with the process,
- ✓ Engagement and continuous improvement become part of the culture
- ✓ Activities previously required to meet quality auditing are no longer bolted on but integral to the everyday provision of quality service.

The DSC Model

DSC has developed a model which takes an integrated approach to strategic planning. The model includes an approach to developing your plan and a framework to document and link all the planning development activities, their outputs, and their contributions to strategic planning.

The model is divided into two stages: understanding the environment in which you operate and putting a strategy into action. We've provided some examples below to get you started on developing your model.



Strategy in action

Understand the environment in which you operate

Understanding the environment in which you operate

The QSC requires strategic and business planning to consider the context in which a provider operates. The Standards refer to “legislative requirements, organisational risks, other requirements related to operating under the NDIS (for example Agency requirements and guidance), participants’ and workers’ needs and the wider organisational environment.”²

Many organisations already have processes (and registers) in place to monitor changes, so you may already have registers and data collection that can be linked to the strategic planning process. Organisations could consider linking the following to their strategic planning process:

- ✓ Subscriptions and registers
- ✓ Hansard and legislative reviews
- ✓ Surveys and feedback mechanisms
- ✓ Referral and intake data
- ✓ Staff satisfaction surveys
- ✓ Training feedback
- ✓ Continuous improvement register
- ✓ Management and CEO reports

Strategy in action

How do we use all the information collected from stakeholders in planning? Summaries of information collected from changes to the sector, feedback from stakeholders, and staff insights all provide key information about the context we are operating in and what the market is looking for. This information can be woven into the documents that are prepared for strategic planning events.

² Schedule 1, Part 2 Provider governance and operational management, NDIS (Provider Registration and Practice Standards) Rules 2018.

Tracking Strategic Actions and Outcomes

When a strategy is put into action through a strategic business plan or operationalised strategy, strategic planning becomes a continuous improvement activity. Identifying the key actions required to implement the strategy, allocating responsibility, and establishing time frames all highlight the importance of the strategy to the organisation. Reporting on those actions through existing structures can keep everyone on the same page and working in the same direction (it also looks pretty amazing at audit time):

- ✓ Management meeting minutes
- ✓ Management key performance indicators and metrics
- ✓ Regular stakeholder communications
- ✓ Continuous improvement register

Tracking strategic actions enables organisations to keep their strategic direction front and centre. It provides leaders with the information they need to make effective decisions, allocate resources, and plan for the future.

About DSC

NDIS is our world, not just a job. We care, or we wouldn't be here.

Not only are our consultants NDIS experts – armed with a plethora of PHDs, MBAs, ex-disability CEO, and NDIA Director positions under their belts – but most also have lived experience of disability. This makes us uniquely positioned to “get” challenges and opportunities from every perspective; leadership, workforce, Agency, sector, strategy, participant, and family.

Across the hugely varied training and consulting work we do with organisations throughout Australia, all the challenges, complexities, opportunities, and sleepless nights can be distilled into one fundamental theme: We want better outcomes for people with disability.

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