



**Australian Government**

# **BSBAT511 Lead the organisation's strategic planning cycle**

**Release: 1**

# BSBATSIL511 Lead the organisation's strategic planning cycle

## Modification History

| Release   | Comments                                                                             |
|-----------|--------------------------------------------------------------------------------------|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

## Application

This unit describes the skills and knowledge required to lead the strategic planning process of an organisation, and assist board members develop and implement a strategic planning cycle.

It applies to individuals responsible for planning, monitoring and guiding the activities of the organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

## Unit Sector

Regulation, Licensing and Risk – ATSI Governance

## Elements and Performance Criteria

| ELEMENT                                                        | PERFORMANCE CRITERIA                                                                                                                                                                                                                                                                                                           |
|----------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Elements describe the essential outcomes.</i>               | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>                                                                                                                                                                                                                         |
| 1 Establish strategic planning process                         | 1.1 Agree to a documented strategic planning process with other board members<br>1.2 Identify and allocate resources to undertake strategic planning                                                                                                                                                                           |
| 2 Develop and review organisation's values, vision and purpose | 2.1 Consult board members, management, staff, community and key stakeholders on values, vision and purpose of the organisation<br>2.2 Identify agreed values, vision and purpose of the organisation with other board members<br>2.3 Ensure organisation's values, vision and purpose are documented and endorsed by the board |
| 3 Analyse internal and                                         | 3.1 Review and evaluate the previous strategic plan                                                                                                                                                                                                                                                                            |

| ELEMENT                                                             | PERFORMANCE CRITERIA                                                                                                                                                                                                                                                                                                                                                                                                      |
|---------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| external factors that could impact on organisation's strategic plan | 3.2 Identify and analyse community aspirations, interests and needs<br>3.3 Identify and analyse changing government policy and funding that might affect the organisation<br>3.4 Identify and analyse emerging and predicted trends<br>3.5 Identify and analyse potential for strategic alliances and partnerships<br>3.6 Seek advice from appropriate experts when necessary                                             |
| 4 Establish strategic objectives and strategies                     | 4.1 Develop and agree on strategies and SMART objectives with other board members, consistent with outcomes of research and analysis undertaken<br>4.2 Ensure objectives and strategies are achievable and benchmarked against industry and community standards<br>4.3 Identify and document factors that may affect achievement of objectives                                                                            |
| 5 Monitor and evaluate strategic performance                        | 5.1 Develop an implementation plan with other board members identifying targets, key performance indicators, performance standards, timelines and reporting requirements for the strategic planning period<br>5.2 Monitor and evaluate progress reports against the plan to identify successes and performance gaps<br>5.3 Review and revise strategic objectives and strategies with other board members where necessary |

## Foundation Skills

*This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.*

| Skill   | Performance Criteria                      | Description                                                                                                                                                                |
|---------|-------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Reading | 2.3, 3.1-3.5, 4.1, 4.3, 5.2, 5.3          | <ul style="list-style-type: none"> <li>Gathers, interprets and analyses textual information from a range of sources and identifies relevant and key information</li> </ul> |
| Writing | 1.2, 2.2, 2.3, 3.1-3.6, 4.1, 4.3, 5.1-5.3 | <ul style="list-style-type: none"> <li>Uses appropriate vocabulary, grammatical structure and conventions to develop and update workplace documentation</li> </ul>         |

|                            |                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|----------------------------|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Oral Communication         | 1.1, 2.1-2.3, 3.2, 3.6, 4.1, 5.1, 5.3  | <ul style="list-style-type: none"> <li>• Uses active questioning and listening techniques to elicit information and confirm understanding</li> <li>• Participates in verbal exchanges using clear language, suitable syntax and tone to address and disseminate relevant information to a wide variety of individuals</li> </ul>                                                                                                                                                                                                                                                                                                                                                   |
| Numeracy                   | 1.2, 4.2, 5.1, 5.2                     | <ul style="list-style-type: none"> <li>• Interprets numerical information and applies basic mathematical calculations to manage available resources and evaluate performance</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Navigate the world of work | 3.1, 3.3                               | <ul style="list-style-type: none"> <li>• Monitors adherence to government policy and organisational procedures</li> <li>• Considers own role in terms of its contribution to broader goals of work environment</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Interact with others       | 1.1, 2.1, 2.2, 3.2, 3.6, 4.1, 5.1, 5.3 | <ul style="list-style-type: none"> <li>• Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders in a range of work contexts</li> <li>• Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective interactions</li> </ul>                                                                                                                                                                                                                                                                                                                                                     |
| Get the work done          | 1.2, 2.2, 3.1-3.5, 4.3, 5.1-5.3        | <ul style="list-style-type: none"> <li>• Organises time and effort around priorities, results and realistic timeframes</li> <li>• Recognises importance of other stakeholders through the planning and implementing process, clarifying goals and proposed methodology with others, maintaining communication and managing expectations and understanding</li> <li>• Uses experiences as means to reflect how variables impact decision outcomes, and to gain insights into what constitutes 'good' judgement and an effective decision in different contexts</li> <li>• Uses ideas proposed by others as provocations and stepping stones to new perceptions and ideas</li> </ul> |

## Unit Mapping Information

| Code and title<br>current version                            | Code and title<br>previous version                            | Comments                                        | Equivalence status |
|--------------------------------------------------------------|---------------------------------------------------------------|-------------------------------------------------|--------------------|
| BSBATSIL511 Lead the organisation's strategic planning cycle | BSBATSIL511A Lead the organisation's strategic planning cycle | Updated to meet Standards for Training Packages | Equivalent unit    |

## Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

# Assessment Requirements for BSBATSIL511 Lead the organisation's strategic planning cycle

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## Performance Evidence

Evidence of the ability to:

- establish and maintain a strategic planning cycle with the board
- work with board, members and community to formulate strategic objectives and strategies
- ensure strategic performance is reviewed and monitored.

Note: if a specific volume or frequency is not stated, then evidence must be provided at least once.

## Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline benchmarking principles and approaches
- describe community consultation and engagement strategies
- explain components of strategic planning cycle
- describe concept of community control of organisations and how it may impact the strategic planning process and content of plans
- describe cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that could impact organisational planning
- list data collection methods
- identify geographic, social, economic and political contexts in which particular organisations operate and how these may impact organisational planning
- outline organisational policies and procedures relevant to planning
- list relevant provisions of federal, state or territory legislation and funding body requirements that may influence decision-making
- identify relevant protocols and cultural responsibilities that impact the planning process
- explain roles and responsibilities of the board and management in organisational planning
- outline strategic planning principles, approaches and strategies, including setting objectives

- outline values, vision and purpose of the organisation.

## Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- participation on an actual or simulated board
- office equipment and strategic planning resources
- examples of relevant strategic planning documents and issues that affect strategic planning.

Assessors must satisfy NVR/AQTF assessor requirements.

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