



Australian Government

BSBGOV503 Conduct organisational strategic planning

Release: 1

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Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to plan and conduct organisational strategic processes. It includes arranging board or committee strategic planning procedures, which incorporate rules, legislation, regulations and codes of practice relevant to the organisation.

It applies to individuals responsible for monitoring, guiding and undertaking decision making activities as members of committees or boards of governance.

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

Unit Sector

Regulation, Licensing and Risk – 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 the organisation's strategic planning process	1.1 Discuss the organisation's strategic planning needs with other board or committee members 1.2 Allocate appropriate resources to undertake strategic planning
2. Develop and review the organisation's values, vision and purpose	2.1 Consult other board and/or committee members, management, staff and/or key stakeholders regarding the values, vision and purpose of the organisation 2.2 Obtain board or committee endorsement for the agreed organisational values, vision and purpose 2.3 Document organisational values, vision, purpose and objectives

ELEMENT	PERFORMANCE CRITERIA
	and the processes undertaken
3. Establish strategies to meet organisational objectives	3.1 Identify and analyse stakeholder aspirations, interests and needs and review the organisation's previous plans, in the case of an existing organisation 3.2 Analyse internal and external factors such as changing government policy; economic, social and political issues; and provisions of federal, state/territory legislation and funding body requirements that might affect the organisation 3.3 Identify and analyse relevant economic and/or political trends and the potential for strategic alliances and/or partnerships 3.4 Develop and agree on achievable strategies to meet objectives, with other board or committee members, seeking advice from experts when necessary 3.5 Develop key performance indicators or targets, timelines and reporting requirements for the strategic planning period with other board or committee members 3.6 Provide guidance on operational processes that need to be put in place to ensure that organisational strategies are followed and document factors that may affect achievement of objectives and targets
4. Monitor and evaluate organisational performance	4.1 Monitor and evaluate progress reports against the plan to identify progress towards key performance indicators or targets, timeliness and performance gaps 4.2 Review and revise strategic objectives and strategies with other board or committee members where necessary and document organisational performance for the agreed strategic planning period

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	3.1-3.3, 4.1	- Interprets various texts to guide activities and decisions - Analyses and evaluates validity of information to identify gaps or inconsistencies between texts

Writing	2.3, 3.6	Collates and compiles material using clear and detailed language to convey specific information, requirements and recommendations
Oral Communication	1.1, 2.1, 2.2, 3.4, 3.5, 4.2	- Participates in a variety of spoken exchanges using suitable tone, language and strategies to confirm, clarify or repair understanding - Makes constructive suggestions when required - Elicits views and opinions of others by active listening and questioning
Navigate the world of work	1.1, 1.2, 2.2, 3.1, 3.3-3.5, 4.1, 4.2	- Takes personal responsibility for adherence to legal/regulatory responsibilities relevant to own work context, and draws attention to any issues that may affect the organisation as a whole - Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	1.1, 2.1, 2.2, 3.4, 3.5, 4.2	Follows accepted communication practices and protocols, adjusting personal communication style in response to values, beliefs and cultural expectations of others
Get the work done	1.2, 2.2, 2.3, 3.1, 3.4, 3.5, 4.1, 4.2	- Develops plans to manage relatively complex tasks with an awareness of how they may contribute to longer term operational strategic goals - Makes a range of critical and non-critical decisions in relatively complex situations, taking a range of constraints into account - Recognises and addresses some unfamiliar problems of increasing complexity within own scope, recognising when to seek expertise of others

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBGOV503 Conduct organisational strategic planning	Not applicable	New unit	No 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 BSBGOV503 Conduct organisational strategic planning

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Performance Evidence

Evidence of the ability to:

- communicate and negotiate to work cooperatively with:
 - other board or committee members
 - management and/or staff of the organisation
 - key stakeholders
- evaluate the progress of the strategic plan and analyse:
 - organisational values, vision, purpose, objectives and key performance indicators and targets
 - economic and/or political trends relevant to the organisation
 - potential for strategic alliances and/or partnerships
 - stakeholder aspirations, interests and needs
- monitor operational processes to ensure organisational objectives and targets are met
- document organisational performance for the agreed strategic planning period.

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:

- discuss the roles and responsibilities of board or committee and management in strategic planning
- explain geographic, social, economic and political contexts in which relevant organisations operate and how these may impact upon strategic planning
- explain the principles and components of the strategic planning cycle
- discuss organisational policies and procedures relevant to strategic planning
- list provisions of federal, state or territory legislation and funding body requirements that may influence decision making

- list resources required to undertake strategic planning.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical committee or board of governance activities and include access to:

- examples of strategic planning documentation.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

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