



Australian Government

Department of Education, Employment and Workplace Relations

BSBAT511A Lead the organisation's strategic planning cycle

Revision Number: 1

BSBATSIL511A Lead the organisation's strategic planning cycle

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to lead the strategic planning process of an organisation and to assist board members to develop and implement a strategic planning cycle. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.
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Application of the Unit

Application of the unit	This unit applies to individuals responsible for planning, monitoring and guiding the activities of the organisation.
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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.
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Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.
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Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Establish the strategic planning process	1.1. Agree to a documented strategic planning process with other board members 1.2. Identify and allocate resources to undertake strategic planning
2. Develop and review the organisation's values, vision and purpose	2.1. Consult board members, management, staff, community and key stakeholders regarding the values, vision and purpose of the organisation 2.2. Identify the agreed values, vision and purpose of the organisation with other board members 2.3. Ensure the organisation's values, vision and purpose are documented and endorsed by the board
3. Analyse the internal and external factors that could impact on the organisation's strategic plan	3.1. Review and evaluate the previous strategic plan 3.2. Identify and analyse community aspirations, interests and needs 3.3. Identify and analyse changing government policy and funding that might affect the organisation 3.4. Identify and analyse emerging and predicted trends 3.5. Identify and analyse the potential for strategic alliances and partnerships 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 that are consistent with the outcome of the research and analysis undertaken 4.2. Ensure objectives and strategies are achievable and that they are benchmarked against industry and community standards 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 that identifies targets, key performance indicators , performance standards, timelines and reporting requirements for the strategic planning period 5.2. Monitor and evaluate progress reports against the plan to identify successes and performance gaps 5.3. Review and revise strategic objectives and strategies with other board members where necessary

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and negotiation skills to work cooperatively with other board members, management and staff of the organisation, members, community and key stakeholders
- culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities
- evaluation skills to monitor the progress of the strategic plan and analyse gaps in performance
- research skills to ensure accurate and current information is available for review and analysis
- strategic thinking skills to collate data from a number of different sources and make recommendations to the board about strategic organisational objectives and strategies
- time-management and planning skills to ensure that strategic plans meet realistic timeframes and are regularly monitored

Required knowledge

- benchmarking principles and approaches
- community consultation and engagement strategies
- components of the strategic planning cycle
- concept of community control of organisations and how it may impact on the strategic planning process and content of plans
- 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 on organisational planning
- data collection methods
- geographic, social, economic and political contexts in which particular organisations operate and how these may impact on organisational planning
- organisational policies and procedures relevant to planning
- provisions of federal, state or territory legislation and funding body requirements that may influence decision making
- relevant protocols and cultural responsibilities that impact on the planning process
- roles and responsibilities of board and management in organisational planning
- strategic planning principles, approaches and strategies, including setting objectives
- values, vision and purpose of the organisation

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	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.
Context of and specific resources for assessment	Assessment must ensure: - participation on an actual or simulated board - access to office equipment and strategic planning resources - access to examples of relevant strategic planning documents and issues that affect strategic planning - knowledge and performance to be assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: - performance of board duties or an accurate simulation of board duties - direct questioning combined with reflection of practical board performance - analysis of responses to case studies and scenarios - observation of presentations - oral or written questioning - observation of performance in role plays.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

<i>Strategic planning process</i> may include:	• establishment of working group or subcommittee • review of previous strategic plan • consultation with Elders, traditional owners, members and community • information collection and documentation • development of: • values, vision and purpose • objectives of strategic plan • strategies for achieving goals • performance measures • review of draft strategic plan.
<i>Resources</i> may relate to:	• board member support • community members • development of working group or subcommittee • external consultants • finances • identified partnerships • information and communication technologies • network contacts • planning expertise • staff.
<i>Values</i> may include:	• business practices • culture • community • community control • family • heritage • self-determination • service and product standards • staff management.
<i>Vision and purpose</i> may relate to:	• long-term community goals • organisational goals.
<i>Emerging and predicted trends</i> may	• business and social enterprise possibilities

RANGE STATEMENT	
include:	• community needs and issues • demographic change • funding priorities • government legislation and policy • local expenditure • new and changing competitors • social trends.
Strategic alliances and partnerships may refer to:	• businesses • local, state or territory, and federal governments • individuals • other organisations.
Strategies may involve:	• culture • community involvement • programs.
SMART objectives:	• are specific, measurable, achievable, realistic and time bound • may relate to: • board practices • community development • finances • human resources • services and products.
Factors may include:	• community • cultural • political • resources • technical.
Key performance indicators may include:	• measures for monitoring or evaluating the efficiency or effectiveness of the plan's implementation • measures used to demonstrate success and identify areas for improvement.

Unit Sector(s)

Unit sector	
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Competency field

Competency field	Regulation, licensing and risk - ATSI governance
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Co-requisite units

Co-requisite units		