



**Community
Legal Centres
Queensland**

Strategic planning toolkit

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This toolkit

This toolkit is designed to provide practical support for community legal centres undertaking strategic planning processes.

The toolkit contains:

- An overview of the planning process
- Ideas for preparing for planning
- Ideas for ensuring the planning process gets finalized and reviewed
- An example planning workshop agenda
- Group work activities or strategies that can start and continue the discussions through a strategic planning process.

The planning process

A strategic plan is a key piece of evidence under the National Association of Community Legal Centres Accreditation process.

It demonstrates that an organisation has considered the impact of the internal and external environment and identifies and sets goals and strategies that define what it is trying to achieve, setting the future direction of the organisation. (See National Accreditation Standard A1.2: Planning Evaluation and Quality Management)

While the strategic plan document is the outcome, developing a strategic plan is a process. The key to successful strategic planning is engaging groups of people in the shared development of the organisation's future direction.

The planning process overview (page 4) provides a guide to how the practical exercises in this toolkit might be used to progress key questions in the strategic planning process.

While the plan is written up as an organisational document, there is no one way of doing this. A successful strategic plan document is a constant reference point for the governance and operations of a CLC.

The following examples of strategic plans from CLCQ members highlights the diversity of these types of documents:

- Aboriginal Family Legal Service Southern Queensland: <http://www.aflssq.org.au/docs/afls-strategic-plan-14-16.pdf>
- Gold Coast Community Legal Centre: <http://www.advicebureau.org.au/our-mission-values-and-strategic-plan.html>
- Law Right: http://www.lawright.org.au/dbase_upl/Strategic_Plan_2014_17.pdf
- Encircle: <http://www.encircle.org.au/wp-content/uploads/Encircle-Strategic-Plan-2017-2020-1.pdf>

- Women's Legal Service: <https://www.wlsq.org.au/assets/PDFs/About-Us/Strategic-Plan-2016.pdf>
- Youth Family Services: http://www.yfs.org.au/wp-content/uploads/2015/04/PP_StratPlan_v3_0515_101265.pdf
- Youth Advocacy Centre: <http://www.yac.net.au/governance/>

Community Legal Centres Queensland also has a strategic plan:
<http://communitylegalqld.org.au/about-us/governance>

The final strategic plan is a key organisational document and should be a reference internally for management committee and staff and externally for clients, stakeholders and other members of the community.

It is a good idea to publish the strategic plan along with other key organisational documents on your website as it:

- demonstrates a commitment to transparency and accountability to the community;
- can be a positive social marketing tool to attract and retain supporters in the community;
- and
- is evidence that your CLC is a strategic, well-run, modern not-for-profit organisation.

Planning Process Overview

	Strategic Planning Process – This Toolkit			Operational Plan	Review of Plan
Key Questions	Where are we now?	Where do we want to be?	How will we get there?	What must we do?	How are we going?
Elements What elements of the planning should we consider?	External Scan Internal Scan Performance Analysis	Vision Mission Values	Goals Objectives Strategies	Operational Plan – Programs Activities	Review of Plan
Definitions¹ What strategic planning words mean		Vision answers the questions about why the CLC exists Mission describes how the CLC contributes to fulfilling the vision Values articulates how the CLC operates - guidelines for how the business of the CLC will be conducted	Goals are the results that sought to be obtained through effort. (usually 3-4 goals) Objectives are the efforts or actions to achieve the goals (may have 3-4 for each goal) Strategies are individual activities and services that work towards an objective	Operational plan outlines the tasks for each objective, the person responsible and the timeframe for completion	
Activities What group activities can help us think about the key question?	Timeline (p11) SWOT (p12) Stakeholder analysis (p13)	Picture of the Future (p15) CLC Epitaph (p15) Values Affinity Groups (p17) Values Continuum (p18) ACORN test (p16) Values Exercise (p20)	STOP, START, KEEP (p21) Prioritisation Exercise (p22) Setting out the Steps (p23) SMART objectives (p24) Decision tree (p25) Mission Model Canvas (p26)		

¹ NCOSS (2015) Management Support: Strategic Planning

Preparing for Planning

Preparing for planning is essential to ensuring a CLC can achieve meaningful outcomes from the planning process. Good preparation for planning can ensure a robust and respectful process where all participants can propose new ideas and challenge the old.

An important part of preparing for the planning is identifying the key outcomes that are expected from a planning process eg. 3-year strategic plan, so that any process is developed to achieve the outcome. To determine the outcomes, discussions with key management committee members (eg. President, Executive) and staff should be undertaken. Defining the outcome then determines the participants and the process.

The group

While planning can be undertaken by individual CLC staff or committee members the value in planning in groups ensures that the organisation is heading in one direction and there is “buy in” from management committee, staff, and volunteers. It also helps to build team cohesion and the feeling that the team is working together to achieve the organisation’s goals.

Strategic planning should be driven by CLC governance processes and involve the board or management committee, if not, optimally driven by them. The level of staff and volunteer involvement in strategic planning may depend upon the size of the organisation. Ideally there should be representatives from across the organisation – management committee, staff teams (administration, legal, social work, finance etc.) and volunteers.

Planning can benefit from the feedback of external stakeholder such as client representatives, supporters, funders, academics, community partners or sector colleagues (eg. other CLCs, peak bodies, other legal assistance providers). Feedback might be obtained through:

- Regional Legal Assistance Service planning processes;
- Network meeting and referral relationships;
- Evaluation processes such as the Community Legal Centre Queensland Self-Evaluation Toolkit (www.communitylegalqld.org.au/evaluation) including survey results; and
- Any other formal or informal feedback.

Facilitation

It should be clear who is going to facilitate the planning process, even if that person is part of the organisation. An external facilitator can ensure that all members of the organisation can participate fully in planning processes. The role of the facilitator is to keep the group on track with the process and participation of the facilitator in the discussions can be at odds with a clear and transparent process.

Community Legal Centres Queensland can help you work out your facilitation options.

When groups work together, it can be a very energizing process, but sometimes not all contributions are on track with the focus on the discussion.

Parking Space Strategy - Whenever anything comes up that not relevant to the discussion at hand “park” it by writing it up on flipchart/whiteboard for this purpose, so that the discussion stays focused and ensures that participants are heard.

It is important to make sure that everyone is heard, but for the facilitator to identify when the group has got off track. The strategy of the parking space can be a useful facilitator tool to hear and record contributions when they are important but can't be unpacked at the time.

Recording

It is important that the ideas from the process get captured for the strategic plan to be finalised. Some of the activities in this toolkit allow for ideas to be captured by participants on flipcharts, whiteboard etc. Make a plan for how notes will be kept and how it will get written up after the group processes.

Working with groups

It is important to maximize participation of group members so a diverse range ideas can be generated. Large group discussions run the risk of only a few people dominating the discussion and excluding less assertive participants.

With larger groups, 8 or more people, consider the use of small group discussions. Small group discussions will need to be directed back into the larger group, but allow for fuller participation by all.

With smaller groups, less than 8 people, small group work might be difficult but discussions in pairs can be used.

THINK, PAIR, SHARE Strategy

THINK, PAIR, SHARE - The facilitator poses a question:

THINK – participants think individually about their answer

PAIR – each participant is paired with another (or 3 if uneven numbers) to discuss responses to the question

SHARE – participants share their responses with large group.

The activities in this toolkit suggest group sizes and facilitation techniques. It is important to bear in mind that the activities are a combination of thinking tools and group facilitation strategy. The thinking tools can be implemented in a range of individual or group settings.

The agenda

The toolkit is intended to assist you to construct a planning agenda by categorizing group activities that are most suitable for the area of planning. A range of activities are suggested in the categories, but the setting of the agenda is a process of working out what will work best with group and your context, eg. you may not need an activity to develop a mission statement, but need an activity to review it. It is also important to be realistic about how much can be achieved with the available time.

Data

There are a range of sources and types of data that might be used in a strategic planning process. Data should be used to enhance the conversation of the planning process rather than be a substitute for them. Allow plenty of time, before the planning process to collect and prepare the data.

Service Data

Data about the services CLCs provide can be used in a variety of ways in a planning process. The nature of data will determine its effective use in planning. Data about services can be the outputs (number and types of services), outcomes (impact on clients/community), and/or environmental (information about trends, legal need, political, economic, population changes, technology). The nature of the data will determine how and when it might be used as part of the planning process. For example, service data can be used as:

- preliminary input into developing the planning process, such as revisiting obligations under funding contracts and ensuring planning takes those into account;
- scene setting at the beginning of a planning process; or
- testing new ideas arising from planning and determining any resource implications.

Service data can be sourced from CLASS, annual reports, surveys, legal needs research and evaluation activities.

Legal Needs data

Understanding the legal need of your community is vital to understanding the existing legal need that the CLC is meeting, as well as whether the planning process should take into account new or emerging legal needs or priority client groups.

The Community Legal Centres Queensland Updated Evidence and Analysis of Legal Need provides a summary of legal needs across Queensland, focusing on geographical regions and priority client groups under the National Partnership Agreement on Legal Assistance Services. This resource can be found at <http://communitylegalqld.org.au/evidencebase>.

Data from evaluation activities

The Community Legal Centres Queensland Self-Evaluation Toolkit assists CLCs to capture, measure and report outcomes for clients and other stakeholders (community partners, justice system and volunteers) systematically. By understanding and measuring the impact of the CLC's work, the information can be used to highlight possible improvements to a service. This service review component of evaluation activity can provide another evidence base for planning discussions for existing or new services. This resource can be found at www.communitylegalqld.org.au/evaluation.

Other data to consider may include:

- Clients – demographics, problems types, changes over time
- Organisation – funding, costs, number of employees and volunteers, skill set of team
- Sector – who else is providing a similar service, where are the gaps, who are the policy makers (local, state and federal)
- Expert/academic evidence about what works.

Post Planning

There should be a clear plan, which can be developed with the group, about how a planning process will be finalised and who is responsible for doing this. Ensure you allow time after the planning process to digest and synthesise ideas to create the final plan.

The CLC management committee is responsible for approving strategic plans and staff are usually responsible for developing operational plans or work plans. The plans should form a basis for the review of organisational processes ie. the management committee monitors the strategic plan, the staff monitor the operation plan or work plans.

The operational plan and work plans should outline:

- Strategies and indicators of how success will be measured
- Activities that show how the organisation will achieve the strategies
- Resources required, people/teams responsible or accountable for each activity/strategy
- Schedule/timeframe for each activity/strategy.

It is important to engage in ongoing monitoring and review of the plan and its implementation to ensure the strategies are being achieved.

Example planning workshop agenda

Strategic Planning Workshop - Small Town CLC To develop a 3 year strategic plan			
<i>Time</i>	<i>Session Detail (NB PowerPoint presentation may be useful in setting out activities as a reference)</i>	<i>Session Purpose and Outcome</i>	<i>Preparation / Materials</i>
45 mins	Session 1: Why are we here? <ul style="list-style-type: none"> Welcome and overview of the day Introductions CLC Epitaph Compare the group's input into the epitaph activity with current vision - do the ideas fit with the existing vision or do adjustments need to be made? 	Set the scene for the planning and confirm or adjust the vision/mission of the CLC	Existing Vision/Mission statements <i>Materials:</i> Flip chart Markers Participant note paper and pens
60 mins	Session 2: Where have we been and where are we now? <ul style="list-style-type: none"> Timeline activity - summarise as whole group on whiteboard SWOT analysis Summarise SWOT as whole group on whiteboard. Reference SWOT discussions in next session. 	Reflect on where we have been and outline the current internal and external environment	<i>Materials:</i> Flip chart Markers Whiteboard SWOT worksheet
90 mins	Session 3: Where do we want to be? <ul style="list-style-type: none"> Brainstorm and list on individual post-it the activities/programs of the CLC (could be pre-prepared and checked with the group). Using the STOP, START, KEEP strategy, facilitate a discussion to sort the list of activities Check in whether there is anything that is not listed that needs to be included eg. ideas that came out of the SWOT analysis From the START and KEEP lists group themes or activities which will develop into planning objectives or strategies 	Reflect on what is essential for the CLC to continue doing; what is not useful to keep doing; and identify any new activities we would start over the plan's life	List of CLC activities/programs <i>Materials:</i> Post-its Whiteboard Markers Flip chart
60 mins	Session 4: How will we get there? <ul style="list-style-type: none"> Mission Model Canvas - small groups develop canvas for any new ideas to be started Small groups present back to the larger group 	Develop a plan for any new initiatives	<i>Materials:</i> Mission Model canvas worksheet
30 mins	Session 5: What happens next? <ul style="list-style-type: none"> Summary of the planning outcomes Agree on next steps 	A plan to finalise the plan and check in about the outcomes of the day	<i>Materials:</i> Record/collect worksheets, notes and ideas to collate later

Where are We Now?

Three Things in Common in Three Minutes

Purpose

“Break the ice” between participants in the group and warm them up for active participation in a workshop.

Task

1. Ask everyone to find a partner, preferably someone they don't know well. If necessary, encourage participants to get out of their seat and move to find a partner they don't know well.
2. Each pair has 3 minutes to discover 3 things they have in common. They can't be obvious things that can be discovered without having a conversation. (eg. “we both have glasses” is not counted, but “both our mothers are doctors” is counted)
3. After 3 minutes, call time and ask participants to introduce each other to the rest of the group share something they learned from their 3 minute discussion.

Timeline

Purpose:

Reflect on the achievements and challenges of the CLC over the past year(s). It's an opportunity to celebrate successes and inspire people to continue to work together, as well as inform the planning process with lessons learned.

Task:

1. Divide the larger group into small groups of 4-6 people. Give each group a piece of flipchart paper and ask them to draw a timeline of the last 3 years. Ask them to answer the following questions and map them on the timeline:
 - What were the CLC's biggest achievements?
 - How did the CLC change? (eg. funding, staffing)
 - What were the key challenges you faced?
 - What was happening in the external environment that impacted on the CLC? (eg. changes in the law, policy, funding environment).
2. Each group presents their timeline to the larger group. Facilitator asks the group to reflect on:
 - What were they surprised about/proud of when looking at the timeline?
 - What does the timeline tell us about how we can build on successes and meet challenges?
 - What can we see worked well?
 - What were the factors that lead to successes or failures?

Materials:

- Flip chart paper
- Markers

SWOT Analysis

Purpose:

Analyse the internal environment and external environments of the CLC.

Task:

1. Divide the larger group into groups of 3-4 or for smaller groups/pairs (see THINK PAIR SHARE p7)
2. Options – allocate each group one area of the SWOT to discuss and record, or have all groups consider all aspects of the SWOT

For each section of the SWOT, think about the following questions:

- What have you observed or experienced that tells you the CLC is working well?
 - What have you observed or experienced that tells you the CLC has some challenges?
 - Given what we know about the current or emerging environment, what opportunities exist for the CLC over the next few years?
 - What are the key challenges likely to be faced the by the CLC over the next few years?
3. Each group is given 20 mins to consider their section/s and record their ideas
 4. Each group presents their ideas to the larger group, and the facilitator records on white board/ flipchart paper in the SWOT grid:

S trengths - What have you observed or experienced that tells you the CLC is working well?	W eakness - What have you observed or experienced that tell you the CLC has some challenges?
O pportunities - Given what we know about the current or emerging environment, what opportunities exist for the CLC over the next few years?	T hreats - What are the key challenges likely to be faced the by the CLC over the next few years?

5. Identify the consistent themes across the SWOT analysis and how they can feed into the plan.

The SWOT analysis feeds into the rest of the planning process, so it should be displayed as a reference for the group for the remainder of the session.

Materials

- Flipchart paper
- Markers
- Participant pen and paper – note the SWOT grid could be provided as a handout for participants to record their small group/pair discussions

Stakeholder Analysis

Purpose:

Identify the stakeholders of the CLC and analyse whether those relationships need to change over the planning period.

Task:

1. Brainstorm and write all the stakeholders of the CLC on individual note cards or post-it notes (2 sets). The list could include stakeholders such as clients, other community organisations, government departments, universities. Be as specific as possible about the names of the organisations or institutions. The stakeholders are those that you need to engage to achieve the goals of the CLC.

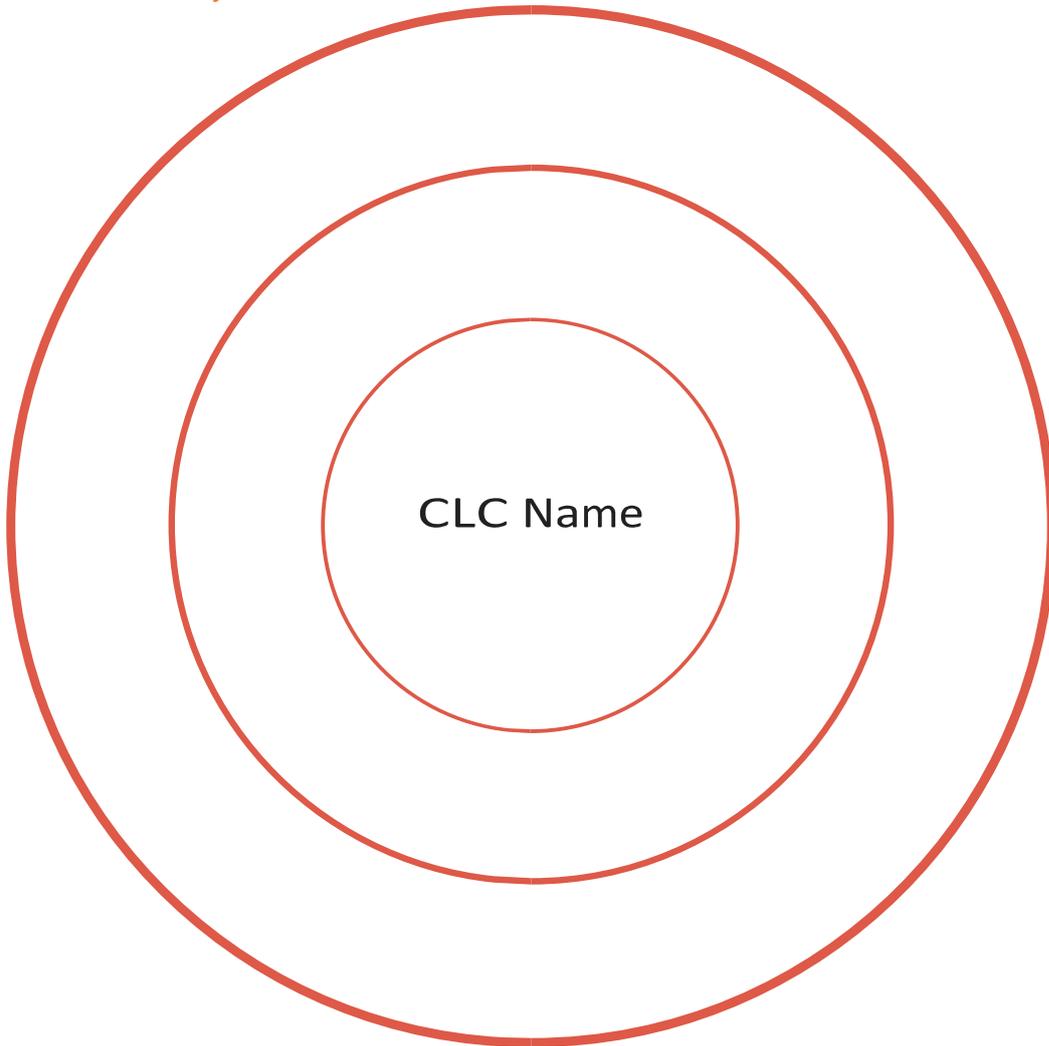
(Variation: the list of stakeholders could be prepared in advance and the group checks whether there are any others/changes that need to be made)

2. On a large piece of flipchart paper, draw 3 concentric circles (bullseye) with the heading NOW. In the middle circle, write the name of the CLC.
3. In discussion with the group, place the stakeholder names on the concentric circles in the position that most reflects the “closeness” of the relationship. If the relationship is not close at all, it may need to be placed outside the circles. This map reflects the state of the relationships NOW. The closer to the middle circle, the closer the relationship to the CLC.
4. On a second piece of flipchart paper draw 3 concentric circles (bullseye) with the heading FUTURE. The group discusses how stakeholder relationships might need to change over the planning period. Place the names of stakeholders on the concentric circles to reflect how relationships need to change or be maintained over the planning period. Encourage participants to talk about why the relationship stays the same or needs to change.
5. At the end of the process, draw together any key themes from the discussion that will inform the remaining planning process. eg. over the next few years we want to build closer relationships with local business who can support our fundraising.

Materials:

- 2 pieces large flipchart paper with 3 concentric circles, one headed NOW, the other headed FUTURE.
- Note cards and blu tac, or large post-its
- Marking pens

Stakeholder Analysis



Where do we want to be?

Picture of the Future

Purpose:

Develop a shared vision.

Task:

1. Divide the group into smaller groups or pairs. Each group is to consider:
 - a. Record 3-4 problems the CLC is trying to address
 - b. Imagine that you have been out of the country for ten years. You have arrived back to find that all the problems have been solved and society is functioning in a way that you had always hoped. Draw or construct a picture of what society would look like using colour, shape, words, and/or images
2. Each group presents its picture and explain what it represents.
3. The facilitator captures key words, particularly those that are value-related (eg. access, equality, quality)
4. The whole group uses the key words to construct a vision statement that reflects the input. The statement could begin with:

We strive for.....

We believe that

We are committed to.....

The pictures could be displayed in a team area in the CLC to keep a focus on the shared vision.

Materials:

- Whiteboard/flipchart
- Paper
- Art materials – coloured pens, construction paper etc.

CLC Epitaph

Purpose:

Develop the mission of the CLC by capturing in 15 words or less the essential impact that the CLC would like to see for a specific group or situation.

Task:

1. Large Group – facilitator poses the question: What would you like the world to remember your CLC for?
2. THINK PAIR SHARE: Complete the sentence: “Because of XY CLC.....” The rest of the sentence should describe the change in the behavior and the experience of key stakeholders (eg, client, community)
3. Pairs report back to the whole group and the facilitator captures the ideas on flipchart paper or whiteboard.

4. After all the feedback has been received, the facilitator draws the themes into a single statement.

Keys to writing the final epitaph statement:

- Short, striking and memorable
- Captures the essential impact of the CLC
- It must be written as an outcome ie. a result you could see, but a change that is realistically influenced
- It can involve one or more groups or institutions and how they might behave differently.

ACORN Test

Purpose:

Develop a new mission statement or review an existing mission statement

Task:

1. Write up the existing or agreed mission statement
2. Ask the following questions to check whether:
 - A – Accomplishment: Does the mission use words to describe results or outcomes rather than behavior?
 - C – Control: Do the organisation's actions determine whether the goal is achieved or does it rely on outside factors?
 - O – Overall objective: Does the mission capture the organisation's reason for existing, rather than a sub-goal of the organisation?
 - R – Reconciliation: Does the mission reconcile with all the goals of the organisation so that each part sees itself in the mission?
 - N – Number – Can the mission be measured so achievement can be assessed?
3. Use the discussion to come to a consensus about whether any changes need to be made to the mission statement.

Materials:

- Whiteboard
- Flipchart
- Markers

Values Affinity Group

Purpose:

Identify and articulate the shared organisational values

Task:

1. This activity can be undertaken in a large group or smaller groups/pairs. Display the following question on a whiteboard/PowerPoint:

“What is important at our CLC and what is unique about working here?”

Possible prompts include:

- How do we work together?
 - What we are trying to achieve?
 - How we treat our clients/each other?
 - Why do I work/volunteer at ...CLC?
2. Write down every answer that comes to mind – If the ideas run dry, prompt with “What is our CLC not?”
 3. With the large group, sort the post-it notes into 5-7 affinity group – ideas that are similar or belong together
 4. Look at the 5-7 groups created and choose a key word that summarises the group
 5. The key word or concept is one of the core values
 6. Define core values by using ideas found in each group of cards and develop consensus about how those values are described. Write up the agreed values on the whiteboard or flipchart.

Materials:

- Post-it notes
- Markers
- Whiteboard/flipchart

Values Continuum

Purpose:

Identify and articulate shared values

Task:

1. Individual participants reflect on the Values Continuum Worksheet and place an X along the line to identify where along the continuum they most typically lie.
2. THINK, PAIR, SHARE – in pairs, share 2 of the values in which a clear preference has been identified. Share why each of these are important and how they were learned.
3. Each participant writes their 2 values separately on a post-it note/or file card.
4. In the whole group, individual participants share their top 2 values.
5. As each person shares their values, group them into 5-7 affinity groups as per Values Affinity Group Activity above, ie. ideas that are similar or belong together.
6. Look at the 5-7 groups created and choose a key word that summarises the group.
7. The key word or concept is one of the core values.
8. Define core values by using ideas found in each group of cards and develop consensus about how those values are described. Write up the agreed values on the whiteboard or flipchart.

Materials:

- Values Continuum worksheet
- Post-it notes or file cards
- Whiteboard/flipchart

Values Continuum Worksheet

Place an "X" along each line to identify where your preference most typically lies

Individualism (I should be rewarded/recognized for my effort)	Collectivism (The group will benefit is what matters)
Equality (I should have access to all levels of power)	Hierarchy (Important to go through the chain of command)
Risk taking (Risk taking is rewarded, risk is opportunity)	Security (Risky proposals avoided, carefully studied)
Task (Primarily focused on outcomes/task)	Relationship (Primarily focused on building trust)
Future (Planning is done for tomorrow, change is promise)	Past (Hold to tradition, change should be slow)
Direct (Speak your mind, even if it involves conflict)	Indirect (Avoid conflict, meaning is subtly expressed)
Emotional Expressiveness (Displaying emotion is encouraged)	Emotional Restraint (Emotional displays are inappropriate/avoided)
Cooperative (Working together)	Competitive (Gaining or winning by defeating)
Spiritual Identity (Recognise and value a spiritual identity)	Secular Identity (Issues of religion are inappropriate, irrelevant)
Deductive (Logical progression, one builds from each other)	Associative (Web of connection, interrelationships)

Values Exercise

Purpose:

Develop consensus on shared organisational values

Task:

1. Write up the CLC's vision statement and then get the large group to discuss:

"What are the values implicit in this vision statement that should guide our work if we are to make a contribution to our vision?"
2. List the values and value statements on the flipchart or whiteboard that get identified in the discussion.
3. At the end of the discussion, develop a set of principles (Dos and Don'ts) for:
 - How the organisation functions
 - How staff/volunteers behave when they approach and do their work.
4. Write these up on the flipchart or whiteboard. The principles can be used to write a values statement and/or review or develop a Code of Conduct.

Materials

- Whiteboard/flipchart
- Markers

How will we get there?

STOP START KEEP

Purpose:

Identify priority areas of work

Task:

This activity can follow-on from other activities such as SWOT, where the group has started to discuss the activities and programs of the service and any future ideas.

A preliminary step for this activity could be brainstorming (in a large group or small groups) all the programs and activities of the CLC and write them on post-its. Alternatively, a list of programs and activities can be prepared in advance on post-its and checked in with the group. The annual report is potentially a resource that can be used to generate an initial list of what is currently done.

Writing the list of activities as individual ideas on post its notes will allow for flexibility and debate.

1. Set up 3 flipcharts each with either Stop, Start or Keep as its heading. Explain to the group what is meant by each heading as outlined below.
2. Using the list of programs and activities or future ideas, sort the ideas into the 3 categories through a facilitated discussion.

START

What should we start doing?

- Ideas that the CLC is not doing, but think they should be doing
- New ideas that have come up or not been considered before
- Ideas to address new situations or factors that have not existed before
- In-house expertise that could be utilised
- Funding opportunities that the CLC may wish to pursue

STOP

What should we stop doing?

- Ideas that are not working
- Ideas that are not having the desired outcome
- May have proved to be impractical
- Funding no longer available for these ideas/programs
- No in-house expertise for the idea/program

KEEP

What should we continue doing?

- Ideas that are working well
- Ideas the group likes and thinks are successful
- Existing ideas but adjusting them for improvements, not “throwing the baby out with the bathwater”

3. At the end of the discussion ask the group to prioritise ideas such as give each participant 3 votes for the ideas on the Start or Keep lists that should be carried through to the plan. 3 sticky dots or stars per participants could be used for participants to cast their vote. Think about organisational match and impact, and rank the options presented.

Materials:

- Flip chart paper
- Markers
- Sticky dots or stars

Prioritisation Exercise

Purpose:

Identify priority areas of the CLC.

Task:

1. Write all the names of all the CLC programs or activities on a flipchart or whiteboard. These can be prepared in advance and checked with the group or generated through a brainstorming session with the group. Note the last annual report might a good reference to generating this list eg. "This is what we say we do in our annual report, is there anything missing?"
2. Put out 3 buckets or make 3 piles on a table, labelling them A, B and C
3. Ask the question: If income were to drop by 50%, which programs would we stop doing first? Each person writes down the program on small pieces of paper or post-it notes and puts them into bucket C.
4. Next ask: If income dropped by 75% and we had to move onto the next round, what would we stop doing? Each person writes down the program on small pieces of paper or post-it notes and puts them into bucket B.
5. Last ask: What would we never stop doing? Each person writes down their response and puts them in bucket A
6. Take the pieces of paper from each bucket and discuss the results:
 - a. What is it clear that you should stop doing?
 - b. What is it clear that you should never stop doing?

Materials:

- Annual reports
- 3 buckets or boxes labelled A, B and C
- Post-its or small pieces of paper - enough for participants to write down at least 3 ideas each

Setting out the steps

Purpose:

Developing major steps or components of the planning themes.

Task:

1. This activity builds on early activities in the planning process, such as SWOT and Picture of the Future. From these activities, identify the consistent themes of the discussion. List each theme on a separate flipchart paper.
2. Small groups are allocated a theme each and they brainstorm the major steps or components of each theme. These are recorded on the flipchart sheet.

For example, if the theme is “Develop an outreach service in Nearby Town”, there may be steps such as meet with local Nearby Town community services, identify resources for outreach staff, advertise the availability of the service. Don’t worry if some of the ideas are contradictory.

While small groups are working on individual themes display large sheets of paper with vertical lines outlining the planning timeline eg.

2018 (Year 1)	2019 (Year 2)	2020 (Year 3)

3. Display the lists of planning themes and their major components. Using large post-it notes, have each small group write the components on the post-its and place them on the planning timeline within the year that the step or component would be largely finished or resolved. This may be messy and there will probably need to be discussion through the placing of the steps.
4. Once all the small groups have placed their steps or components on the time line, the larger group should review the timeline. Some questions to consider are:
 - Are the major steps in the right order?
 - Are completion dates realistic?
 - Do we have all the steps, is anything missing?
 - Are there any linkages between the themes or steps?
 - How will we know if we have achieved a step?
 - Do we have the resources?
5. The themes become the goals of the plan and the steps or components become the objectives of the plan.

Materials:

- Flipchart paper
- Large post it notes
- Marking pens

SMART objectives

Purpose:

Develop measurable, tangible objectives which can be measured and reviewed.

Task:

The objectives in the strategic plan need to be written in a way that are tangible and measurable, so that they can be easily reviewed.

Once the key themes of planning are developed with the group, a group of 3-4 goals will emerge and each goal might have 3-4 objectives.

For example:

Goal: XY CLC will start a new Outreach at Nearby Town

The objectives will be the specific steps to achieve the goal. Objectives need to be described and understood easily by others. SMART is a useful tool for ensuring objectives are clear.

S - Specific

M - Measureable

A - Attainable

R - Realistic

T - Time bound

Objective examples:

Bad example: Increase client services available at Nearby Town

Good example: By July 2019, scope the availability of a pool of solicitor volunteers at Nearby Town to establish a new outreach site.

Bad example: Increase CLC income through fundraising.

Good example: By July 2019, increase the number of regular donors by 10%.

Small groups can be allocated a goal (derived from the key themes of the preceding discussion) and tasked to develop a few SMART objectives for their goal.

Materials:

- Whiteboard/flipchart
- Paper
- Markers

Decision tree

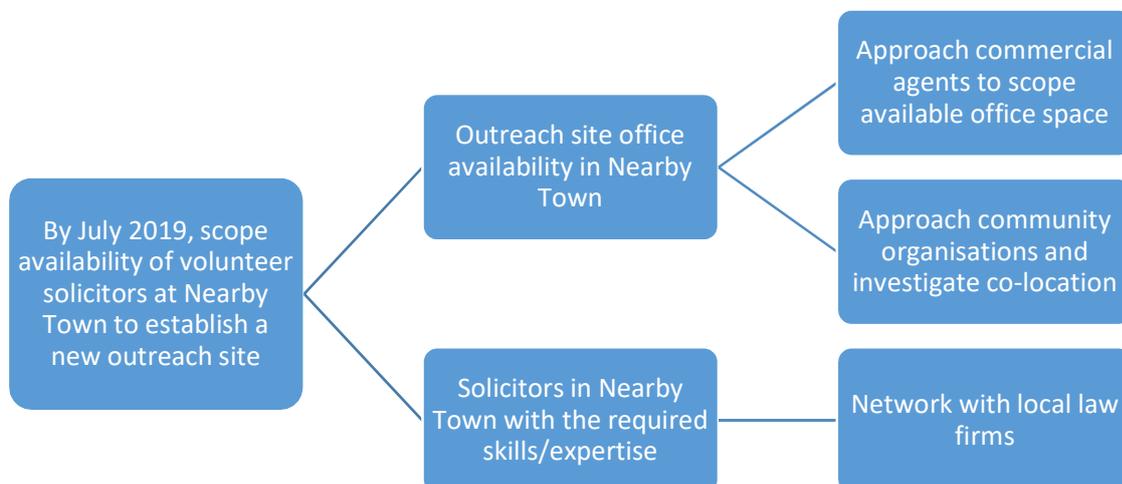
Purpose:

Break down each of the CLC's goals/objectives into distinct strategies/activities to help the CLC reach its goals/objectives. Assists with logical decision making. All options are laid out so options and consequences can be analysed and challenged.

Task:

1. Break into small groups – each group will cover one goal identified in the SMART activity. Alternatively, work as a whole group on one goal as a demonstration, then break into smaller groups to continue the decision tree task with remaining goals.
2. Place the goal in a box on the left hand side of the paper or whiteboard/flipchart. This could be formulated as a question to guide thinking eg. "What do we need to do to [goal / objective]."
3. Draw lines from this box to indicate the steps to break down the goal. Note each component required to achieve the goal.
4. From each of the second group of boxes, draw lines to further break down these higher level steps into smaller tasks.
5. Continue until the boxes cannot be broken down any further.
6. Analyse the decision tree – gather evidence about what works and remove any options from the decision tree that aren't based on evidence.

For example:



Materials:

- Whiteboard/flipchart
- Paper
- Markers

Mission Model Canvas

Purpose:

Planning and developing new activities or initiatives or drawing together the threads of the whole planning process.

Task:

Specific initiative:

1. Identify any new ideas or initiatives that have been discussed as part of the planning process.
2. In small groups or pairs, provide a mission model canvas worksheet. It may need to be reproduced as an A3 to give enough space for ideas.
3. Participants work through the questions on the model, using post-it notes to respond the areas. One idea per post-it note so that the ideas can be moved around. It doesn't matter which area participants start with. The discussion is important.
4. Once all the elements are sketched out the small group should try telling the story of the model, one-post-it at a time. This is an opportunity to review whether the ideas are in the right places.
5. Each small group then presents their mission model to the larger group.

Whole strategic plan reflection:

1. Use a large whiteboard to present the mission model canvas – large enough that multiple post-it notes can be placed in each section of the canvas.
2. In small groups or pairs allocate one or more areas of the canvas to develop ideas/reflections arising out of the planning process.
3. Participants work through the questions on their section/s using post-it notes to respond to the areas. One idea per post-it note so that ideas can be moved around.
4. Once all the elements are sketched out, the larger group works through the responses in each section, using it as an opportunity to check in with the group about each area and making sure that it tells the complete story/picture of the planning discussions.

Materials:

Mission Model canvas worksheet A3 size (if applicable)

Whiteboard

Post-its

Markers

The Mission Model Canvas:

Vision: Outlines what the organisation wants to be eg. A World without poverty (*Picture of the Future p15; CLC Epitaph p15*)

Key Partners (What cooperative relationships with other people or organisations do we need to achieve the org's mission and services?) <i>Stakeholder Analysis p13</i>	Key Activities (What are the main actions we need to undertake to achieve our mission?) <i>STOP, START, KEEP p21</i>	Value Proposition (What is the organisation's mission, main programs, brand?) <i>SMART Objectives p24</i>	Relationships (What types of relationships do we want to establish with key beneficiaries or supporters?) <i>Stakeholder Analysis p13</i>	Ultimate Beneficiaries (Who are the target group/s we are principally aiming to reach and serve to achieve our mission?) <i>Stakeholder Analysis p13</i>
	Key Resources (What physical, financial, intellectual or human assets do we need?) <i>SWOT Analysis p12</i>		Program delivery methods (What are the methods we use to achieve our mission or activities?) <i>Setting out the steps p 23 STOP, START, KEEP p21 Decision Tree p25</i>	
Expenditure (What are the expenses we will incur to implement the activities?) <i>STOP, START, KEEP p21</i>		Income (What is the funding or income stream for the activities?) <i>STOP, START, KEEP p21</i>		
Impact (What is the higher level situation that the program/project aims to achieve) <i>Pictures of the Future p15</i>				

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