

GUIDE TO VISION, VALUES AND PLANNING POLICY TEMPLATE

ABOUT THIS POLICY AREA

This policy guides how the organisation develops strategic plans, operational plans and service delivery models informed by an agreed vision and set of values.

A written vision, values and planning policy is required as part of meeting Standard 10 (Organisational alignment).

Standard 10 – organisational alignment

The organisation has a clearly articulated vision, set of values and philosophy and delivers services consistent with these and contractual agreements. The organisation has a statement of its vision, values and objectives and processes for planning to achieve these objectives.

Policy checklist

The following checklist will help you check that an existing policy covers this area adequately.

The policy should:

- document the organisation's vision and values
- indicate how these are promoted
- say how planning and service delivery models will be guided by the vision and values
- say how planning will ensure that service delivery models are responsive to the needs of clients
- describe how strategic planning is undertaken by the organisation
- contain clear procedures and actions
- indicate the timing of any actions
- show when it was approved
- show when it was last reviewed.

COMPLETING YOUR VISION, VALUES AND PLANNING POLICY

Using the policy template

The template provides some example statements. You can adapt these statements and include them in your policy or write your own statements to better suit the operations and services of your organisation.

To customise the policy template, click on the shaded sections <<Insert text>> and insert the information that is specific to your organisation.

When you have completed the policy template, delete the shaded instruction sections such as: [Refer to the vision, values and planning policy template guide for questions and/or examples to consider when customising this section.](#)

For further information on using the policy guides, refer to the information in *Using the policy templates and guides*.

Guidelines for each section of your policy

1. Purpose

When identifying the purpose of the policy, consider how the needs of your organisation's particular client groups inform the development of the organisational vision, values and plans, and how these are then applied to the development of service models. Do you need to make specific statements to ensure you are inclusive of particular groups, such as Aboriginal and Torres Strait Islander peoples, Australian South Sea Islanders, people from culturally and linguistically diverse backgrounds and people with a disability?

2. Scope

To determine the scope of the policy, consider the following questions:

- Does this policy apply to all your organisation's activities and services?
- Will different service or activity areas apply the core vision and values differently?

3. Policy statement

If you are adopting the policy statement in the template, consider whether there any additional commitments your organisation wants to make.

In identifying the actions your organisation will take to implement this policy, you should include the following:

- development of a statement of organisational vision and values that will guide the plans and activities of the organisation
- review and refinement of the vision and values statement at regular intervals
- promotion of the vision and values statement across the organisation and as part of the organisation's public profile
- strategic planning processes conducted at appropriate intervals
- gathering and integration of information about client needs in strategic planning processes and in the development of service delivery models.

4. Procedures

The procedures describe how your organisation achieves the aims and goals you have outlined in your purpose, scope and policy statement.

4.1 Development and review of statement of organisational vision and values

Describe how your organisational vision and values were originally developed, whether they have been reviewed and changed over time, and where they are documented.

Describe how often the statement is reviewed and how this is done. This might be:

- every year at the annual planning day
- once every three years as part of longer-term strategic planning
- as part of major organisational reviews every 3–5 years.

4.2 Promotion of the vision and values statement

List documents in which the organisation will publish its vision and values statement, and other places that it will be displayed. These may include:

- the annual report
- organisational pamphlets
- the organisational plan
- in poster form for display within and outside the organisation
- as part of information given to clients.

Other ways of promoting the vision and values of the organisation might include:

- placing them in staff and board or management committee induction programs
- featuring them in public presentations
- using them as a starting point for staff or board/management committee discussions
- ensuring that they are used as a reference point in relevant decision-making and planning activities.

4.3 Strategic planning processes

Strategic planning is usually conducted on a 3–5 yearly basis, with annual reviews and adjustments being made. Consider how often the organisation will conduct a full strategic planning exercise, who will be responsible for coordinating and organising it, and who will be involved.

Strategic planning will usually involve the board or management committee and senior staff. Other staff, volunteers, clients and other stakeholders may have direct participation, or may have participation via a research or consultation process conducted to inform planning (see section 4.4).

Indicate whether the organisation will make use of external facilitators or consultants to assist in the process, and what the role of these people will be.

4.4 Informing strategic planning

List the types of information that will be used to inform the strategic plan. This might include:

- demographic and social needs data
- local council planning information
- specific research into community needs
- research conducted by others into service models
- current government policy relevant to service delivery
- the organisation's performance data (such as client numbers, client feedback etc.).

Also identify groups of people who may be asked to provide input/feedback on services or other information. This may include staff, volunteers, current and former clients, other agency representatives and general community members.

Information from people may be gathered through a variety of means, including surveys, consultations, public meetings and individual interviews.

5. Other related policies and documents

List the other policies related to the vision, values and planning policy. The policy should be linked to:

- organisational authority policy
- performance monitoring and reporting policy.

6. Review processes

Consider how often the policy should be reviewed and the process for doing this:

- **frequency of review:** Most policies benefit from an annual review. The experience of implementing the policy is used to decide which changes are necessary. Consider reviewing your vision, values and planning as part of an annual review of your organisation's governance-related policies or, if your organisation is small, perhaps over a three-year period. Critical incidents may prompt you to review the policy ahead of schedule.
- **responsibility for the review:** In most organisations, the board or management committee would be responsible for reviewing this policy in conjunction with the senior staff.
- **process for the review:** Decide which particular staff, volunteers, external people and organisations will provide input to the policy review, and whether clients will be involved.
- **decision-making process:** Who will review draft changes to the policy and approve changes? What will be the timeframe for the review process?
- **documentation and communication:** What records of the policy review process are needed? How will changes to the policy be communicated to staff implementing the policy? In a small organisation, this may be as simple as noting the changes at a staff meeting. In a larger organisation, an email memo may be needed.
- **key questions for the review:** Is the policy being implemented? Are procedures being followed? Is the policy clear? What has changed that may prompt a change to the policy? Have particular stakeholders had difficulty with any aspect of the policy? Can their concerns be resolved? How does the policy compare with that of similar organisations?