



# ***CONSIDERING OUR FUTURE***

***How a Seniors Club Developed a Strategic Plan***

***May, 2004***

***Woden Senior Citizens Club***

***Canberra, ACT***

# ***A Resource and Guide for Seniors' Organisations and Community Groups***

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National Library of Australia Cataloguing-in-Publication

Considering our future : how a seniors club developed a strategic plan : a resource and guide for seniors' organisations and community groups.

Includes index.  
ISBN 0 646 43577 9.

1. Woden Senior Citizens Club - Planning. 2. Older people - Societies and clubs - Australian Capital Territory - Woden - Planning. 3. Older people - Services for - Australian Capital Territory - Woden - Planning. I. Mackay, Marcus. II. Hellyer, Grahame, 1940- . III. Woden Senior Citizens Club.

362.60609471

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## **FOREWORD**

*Considering Our Future* outlines how members of one seniors' organisation in the ACT decided they needed to seriously consider their organisation's future, and plan for what they wanted. In particular, they wanted to identify how their Club could best develop and respond to meet the needs of their members and the growth in the proportion of older people projected for their community.

It tells the story of how they went about the process of gathering relevant information, agreeing on what they wanted and what was important to them, identifying strategies and goals and summarising it all in a document called a strategic plan.

The strategic planning process took just over one year from February 2003 to March 2004, with the assistance of external consultants. This process did not always go as planned, but it was completed successfully and is now being implemented.

*Considering Our Future* has also been written as brief guide and resource book to help other seniors clubs and community groups that may be considering some type of strategic planning process for their own organisations. It contains a description of the key steps involved, some of the key issues encountered and some reflections on learning experiences gained during the process.

The Woden Senior Citizens Club is grateful to the Canberra Community Foundation<sup>1</sup>, which provided a grant of \$40,000 to help the Club develop its strategic plan.

Anne Murray  
President

May 2004

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<sup>1</sup> The Canberra Community Foundation was established by the ACT Government to provide special-purpose funding for community group projects.

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## **SUMMARY**

Approximately 30 dedicated people started the Woden Senior Citizens Club in 1973. By 2003, it had grown to 600 members with comfortable club facilities in the Woden Town Centre.

Over the next ten years we expect the proportion of people in the 50-plus age group to grow significantly, with the potential for Club membership to grow substantially as well. However, our Club's facilities will be severely pressured or unable to cope with this increase.

This led our Club's management to undertake a process of investigation, discussion and documentation in creating a plan of how we should develop the Club over the next ten years. This process is generally known as strategic planning.

This project proved challenging for us as many of us did not have experience in strategic planning. Further, most of us were retired and had not planned to take on work like this in our "golden years". Fortunately, we applied for and were given a grant of \$40,000 by the Canberra Community Foundation. This enabled us to engage some consultants to help us with the project. We also obtained other help from the community.

The consultants ran the project, which was supervised by a Project Executive on behalf of our Committee of Management. We also received assistance from a Project Advisory Group – a small group of external people with special expertise. It took just over one year to complete.

The process is spelt out in full in this guide. Essentially, it involved the following stages:

- ◆ Detailed design and planning of the project,
- ◆ Information gathering and research,
- ◆ Identification of our Vision, Values and Goals in a special workshop,
- ◆ Development of the Strategic Plan in full,
- ◆ Review and agree the Strategic Plan and develop Action Plans,
- ◆ Communicate the Plan, and
- ◆ Implement the Plan.

The process did not always go according to our expectations:

- ◆ It put greater pressure on our Club's managerial and administrative capacity than we expected,
- ◆ Some stages took longer than expected as extra tasks were identified and various suggestions and changes were made,
- ◆ Consulting and informing our members proved more difficult than anticipated, and
- ◆ Fears and misunderstandings about the process developed and circulated with a number of members.

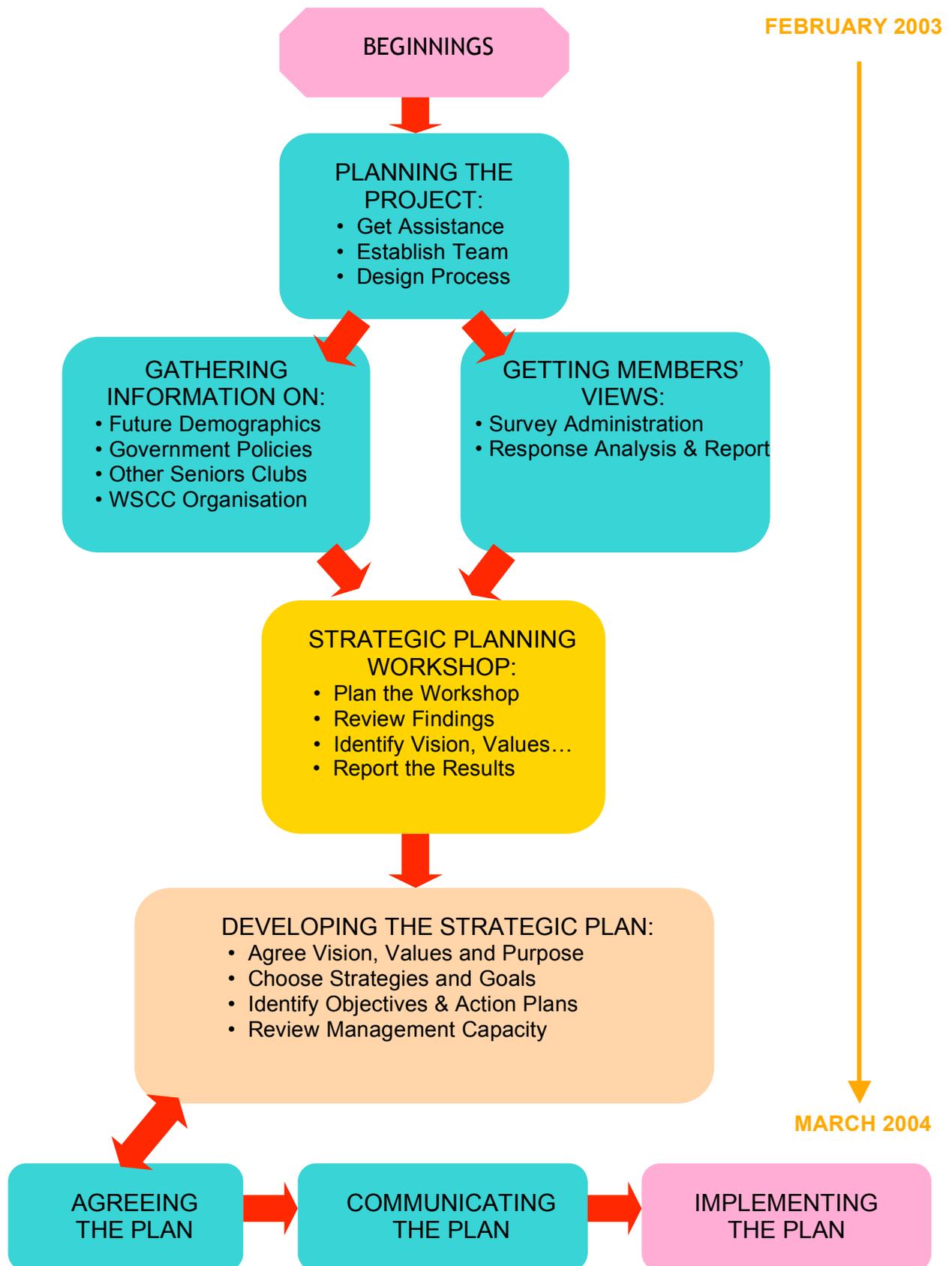
Nevertheless, these difficulties were tackled and the project was completed successfully more or less on time.

Our main achievement was to have been through a process of investigation, discussion and agreement about what we wanted to do about developing the Club in the future. This has laid a foundation of understanding and agreement that can help us make appropriate decisions about developing the Club over the next ten years. As such, it provides a "route map" of where we want to go. However, most of the key decisions involved are still to be made, and will depend on further investigations, more consultations with members and the opportunities available to us.

We have also printed a Strategic Plan document and detailed Action Plans, as well as a number of supporting documents that summarise what we have achieved. These are valuable in reminding us what we have agreed and what we have to do, as well as giving us material for the Government and groups in the community to explain who we are and what we are trying to achieve.

The following diagram provides a visual summary of the key steps in the strategic planning process used by the Woden Senior Citizen's Club.

# Map of the Strategic Planning Process



## 1. BEGINNINGS

**Key Issue:** The need to develop clarity and agreement about why we should undertake a challenging project like this and what it involves.

About 30 dedicated people established the Woden Senior Citizens Club in 1973. We have since grown to around 600 members with a comfortable Club facility for members' activities in the Woden Town Centre. We were, however, starting to experience limitations with our building.

Our current President is also a member of the ACT Government's advisory Council on the Ageing and was aware of the growing proportion of older people in the community and their needs. The President, Committee members and the Administrative Officer felt that both the existing management and the Club facilities would come under significant pressure as the numbers of "over-50s" in the community increased and some joined our Club.

Some other issues of relevance were the need to review the Club ethos to see if it was suitable for current and future needs (especially the possible different interests of ageing baby boomers), and to understand the effect of major expansion of other social clubs in the area on Club membership and activities.

This led to discussion about how we should respond. Some of us also talked about the role of our Club in the local community. A small number of external people interested in the Club also contributed to this discussion. This resulted in the decision to undertake an exercise in planning for our future development in a systematic way.

Fortunately, the ACT Government had set up the Canberra Community Foundation as a source of funding for community projects. An application was made to the Community Foundation for a grant to enable a formal strategic planning process to be undertaken. A \$40,000 grant was given.

**Reflection:** Other seniors' clubs may have other reasons for seeking to plan for their future. In our case, this decision was driven by the expected increase in the proportion of 50-plus people and existing inadequacies in our Club premises, not by member complaints or major internal difficulties.

## 2. GETTING ASSISTANCE

**Key Issue:** A strategic planning process requires special skills and lots of additional time and energy to implement and complete. Where will these resources come from?

Some Club members had valuable skills that could be used in undertaking a strategic planning project. But there were not enough members with the right skills or the time and the willingness to undertake the task. So, we decided to find and appoint some external consultants experienced in strategic planning to help us.

While our grant of \$40,000 would help us in paying for external consultants, and other costs, it would not go far if we had to pay full commercial consulting rates. Fortunately, we found and appointed consultants prepared to help us at a cost we could afford. The consultants who undertook the work had had some prior contact with the Club.

We were also helped with other costs by organisations happy to support the Club. We had help with printing, venues, development ideas and catering. We also had one substantial donation from a commercial company.

Some developers expressed interest in our project and our site. We could not start serious negotiations with them or make any promises despite their interest. We had to be careful not to compromise the project's independence.

**Reflection:** Many people are often happy to help a community group with substantial discounts or on a volunteer basis. It is worthwhile looking for people, with the right skills and time to help, in the community, in commercial organisations and in government. Some may be Club members.

## 3. ESTABLISHING THE TEAM

**Key Issue:** The strategic planning project was a new and major project for the Club running over 12 months. How should we structure and manage it?

A structure to oversee the project was established. The structure consisted of a Project Executive and a Project Advisory Group.

**Project Executive** – The Project Executive was responsible for directing and monitoring the work of the consultants on behalf of the Club's Committee of Management. Initially the Project Executive consisted of the President and the part time Administrative Officer. As the workload generated by the project

increased beyond that anticipated, the Administrative Officer left the Project Executive to concentrate on other Club duties. The Vice-President and another Committee member joined the Project Executive. The additional members also provided further perspectives and spread the burden for examining documents and making suggestions from time to time. The Project Executive met with the consultants every few weeks depending upon the level of activity. Twenty meetings were held in all.

**Project Advisory Group** – A Project Advisory Group was established under the Chairmanship of a noted member of the community with wide experience in community affairs. The Group was made up of a mix of Committee members and people from outside the Club. It was very successful in providing suggestions to guide the course of the project and gave the President confidence that the project was on track. The Group and the consultants met on six occasions.

**Consultants.** The Project Executive engaged two consultants from one company as principal consultants but also engaged a third consultant who brought additional skills to the process. The three worked effectively as a cohesive team bringing a balance of skills to the project.

**Reflections:** We under estimated the amount of work involved for the Club's Administrative Officer and Committee Members alike. It is very difficult getting six people together at the same time - particularly when three are volunteers.

Having the additional perspectives, experience and views contributed by external members in the Project Advisory Group proved invaluable in the process.

## 4. DESIGNING THE STRATEGIC PROCESS

**Key Issue:** How to apply strategic planning principles practised in large organisations to a small community organisation in a practical realistic way?

Before appointment of the consultants, the President and the Administration Officer put some time and effort into the design of the planning process for the Club. This included defining the stages and expected outcomes from each stage. Preliminary discussions with consultants helped in this process.

**Table 1: Outline of Strategic Plan Stages and Outcomes**

Stage	Description and Aim of Stage	Expected Outcome
1	<p><u>Detailed Planning of Project</u> -</p> <ul style="list-style-type: none"> <li>• Clear and agreed schedules of tasks and timings for the project.</li> </ul>	<ul style="list-style-type: none"> <li>• Detailed project schedule</li> <li>• Detailed research schedule for Stage 2</li> </ul>
2	<p><u>Information Gathering and Research</u> -</p> <ul style="list-style-type: none"> <li>• Conduct of agreed research and information gathering projects to inform the next stage of the project.</li> </ul>	<ul style="list-style-type: none"> <li>• Written reports on all the information and research tasks</li> </ul>
3	<p><u>Strategic Planning Workshop</u> -</p> <ul style="list-style-type: none"> <li>• For presentation and integration of outcomes from the research and information gathering tasks.</li> <li>• For discussion and agreement about Vision, Values and Purpose of the Club.</li> <li>• For discussion and agreement of key Goals for the Club.</li> </ul>	<ul style="list-style-type: none"> <li>• Workshop report documenting discussion and agreement as a basis for next stage.</li> <li>• Agreement of draft statements of Vision, Values, Purpose and Goals</li> </ul>
4	<p><u>Development of the Strategic Plan</u> -</p> <ul style="list-style-type: none"> <li>• Development of draft Strategic Plan based on outputs of earlier stages and inputs from Committee of Management, Project Advisory Group.</li> <li>• Integration of additional information and updates.</li> <li>• Consultation and communication with Club members.</li> <li>• Review Club's management capacity to implement the Plan.</li> </ul>	<ul style="list-style-type: none"> <li>• A draft Strategic Plan</li> <li>• A draft supporting document of detailed Objectives and Action Plans for each of the Key Goals</li> </ul>
5	<p><u>Reviewing and Agreeing Draft Strategic Plan</u> -</p> <ul style="list-style-type: none"> <li>• Final consultations with Committee of Management and Project Advisory Group and finalisation of document.</li> </ul>	<ul style="list-style-type: none"> <li>• Agreed final Strategic Plan document</li> </ul>
6	<p><u>Communicating the Plan</u> -</p> <ul style="list-style-type: none"> <li>• Preparation of Strategic Plan document for printing and distribution.</li> <li>• Completion of supporting documents.</li> <li>• Report to Canberra Community Foundation for use of grant.</li> </ul>	<ul style="list-style-type: none"> <li>• Strategic Plan printed and distributed</li> <li>• Supporting documents completed</li> </ul>
7	<p><u>Implement Strategic Plan</u> -</p> <ul style="list-style-type: none"> <li>• Commence implementation of Strategic Plan with guidance of Actions Plans at a pace and in a manner determined by Club's Committee of Management.</li> </ul>	

A map of the key steps in the strategic planning process is provided in the front summary. The main stages and expected outcomes are summarised in Table 1 above as well.

In reality, pressure to get on with the project led to some initial detailed planning not being done in Stage 1. One consequence of this was additional work being required of the consultants in later stages, in particular in Stage 4 as the needs became apparent.

In Stage 4, Development of the Strategic Plan, additional consultation was planned with members via focus group discussions. In reality they were not held because:

- It took longer than expected to complete drafts of the Strategic Plan ready for consultation.
- There was a perception that members were not particularly interested.
- Pressure of time and resources led to other priorities dominating.
- The Project Executive was reluctant to go to the members with anything less than a final Plan.

As it turned out, a special meeting of members proved necessary to address concerns that had arisen about the process. In particular, there was some unfounded disquiet that a decision had been made about facilities redevelopment. This meeting was held in March 2004, near the end of the project.

**Reflections:** Time spent understanding, planning and agreeing details of the project at the beginning will be helpful later in the project.

Strategic planning terminology is often foreign and confusing for people with no experience of the process. Care needs to be taken in keeping things simple and clear. Consistent use of non-technical language is recommended.

Particular attention needs to be given to the timing and form of progressive consultation with Club members.

## 5. GATHERING INFORMATION

**Key Issues:** How many people aged 50-plus are there in our area, how will their numbers grow in proportion over the next ten years and how many of them may wish to join our Club?

What is the status of the Club's land site (classified as Community Facilities Land Use) and what are development possibilities and limitations?

What type of government support and assistance is provided to other seniors groups in other states and territories? How are these seniors' groups organised?

The first task of the Club and the consultants was to gather good background information that would enable the Club to understand:

- Its **current internal situation** – needs and resources, including the views and needs of our members (see Section 6).
- The **social, economic and political environment** – the Club operates in a wider social context as a community organisation.
- **Likely future developments** – over the next ten years that could affect the Club, including an increasing proportion of older people in the community and the implications of government policies.

A series of information gathering-tasks was identified and initiated with the aim of providing summary briefing papers to inform the Club and its members, and to provide the factual basis for the next stage in the strategic planning process.

These information tasks were:

- **A demographics paper** – to establish the proportion of people aged 50-plus in the ACT and communities near Woden and the trend in the projections on their growth over the next ten years.
- **A review of the ACT Territory Plan** in relation to the Club – to ascertain the likely land-use planning opportunities and constraints on any future development of the Club's premises.
- **A study of the current organisation and resources** – to understand the Club's current financial position, organisation capacity, constitutional foundation and physical assets.
- **A broad examination of Federal, State/Territory and Local Government policies** and support for Senior Citizens Clubs and groups.
- **A comparative survey of other organisations, both within and outside the ACT**, providing activities and services for people in the 50-plus aged group.

As each task was completed, a draft summary paper was prepared. It was discussed by the consultants, the Project Executive and the Project Advisory Group members. In some cases, this took many months and there were many drafts before final versions were completed that satisfied everyone.

**Reflection:** The process of gathering information, and reviewing it, often leads to the need to collect more information so the process can extend and develop. The more people involved in oversight groups the more different views there will be on what a strategic plan should include.

Other groups may not share the same situation as our Club and may have to collect types of information different from than we chose to collect. Collect what is relevant to you.

## 6. GETTING OUR MEMBERS' VIEWS

**Key Issues:** How do we consult with and find out what our members want? How do our members use the Club's services and what do they want, need and think about how the Club can develop?

Consultation with our members was a task of key importance. The Club exists for the members and their views and needs must be understood, and would be the key determinant in the final content of the Strategic Plan.

The first consultation task was finding out about the members in more detail and getting their views and experiences on a range of topics. A questionnaire was designed by one of the consultants to provide basic information on:

- A profile of members (eg age, gender, location, financial status, etc...).
- The type of Club activities they used, how often they used them and what they would like in the future.
- How they travelled to the Club and their access needs.
- Members' views on the Club now and in the future.

A specialist social consultant was engaged to analyse the survey of membership and produce a report. The specialist consultant also offered us special rates as a community organisation. The survey results were made available to members and reported in the Club's newsletter.

About 25 per cent of members completed the survey. Although a higher response was desirable, the results provided much valuable information.

**Reflection:** You have to put a lot of effort into getting members to complete and return questionnaires. It does not happen automatically.

## 7. PLANNING A WORKSHOP

**Key Issue:** What sort of workshop event would be sufficient to work through all the information we had collected and agree on conclusions, but not be too long and too difficult for our members?

The next major step in the planning process was to review all the information we had gathered and to agree what it meant for us. To some extent these conclusions were already suggested in the summary papers, but we still had to really look at them and talk about what they meant.

To do this, the consultants organised and ran a one-day workshop of about 25 of us, plus 15 invited people representing different perspectives and groups from the community, government and commerce. A local social club provided complimentary workshop facilities. Three additional volunteer facilitators were coopted to facilitate discussions on tables of eight people.

Attendees were given summaries of the background papers before the workshop and heard brief presentations about them at the start of the workshop. All participants then worked in groups discussing the information presented and then developing suggestions for the Club's Vision, Values, Purpose and Goals. These items were essential in defining and agreeing the Club's broad direction for the future.

We could not do much in one short day, so we only attempted to agree broad ideas by the end of the workshop. Given this, the workshop was very successful. It not only contributed further views from those present, but also enabled us to feel that we were contributing to the planning process.

At the conclusion of the workshop the consultants had a very good feel for the issues that we considered were important to the Club.

We also understood that a lot of work had to be done in writing up the workshop results, in developing the broad ideas into succinct statements and in sharing them with other members who did not attend the workshop. There were more than 500 members who did not come to the workshop!

**Reflection:** There are many ways to integrate the results of investigations and agree on your overall direction. The key thing is that your organisation's members are involved and feel ownership in the process. Properly facilitated workshops and similar events have proven very effective in triggering discussion, interaction and ultimately agreement.

Successful workshops and similar processes do not happen automatically. They are the result of a clear understanding of what is needed, a good design, thorough preparation and effective facilitation.

## 8. DECIDING WHAT WE WANT (TO BE)

**Key Issue:** What is really important to us all (as a Club) and what do we want to achieve and become in the future?

In the last section we referred to developing ideas for the Club's Vision, Values, Purpose and Goals. These terms are used to succinctly describe an organisation's intended future direction – what we want to achieve and become.

Specifically these terms mean:

**Vision** – a short statement that expresses the type of seniors club we want to be and how we hope to be seen by others.

**Values** – those really important beliefs we hold together that should guide our actions and decisions now and in the future.

**Purpose** – a statement of the role or functions we agree for the Club. It is essentially what we do and want to continue doing!

**Goals** – these are the big objectives we want to achieve over the next few years. We identified one goal for each of the four key areas of the Club – activities and services, the membership, our building and facilities and management and finance.

It took us some time for all those involved in the project to finalise and agree the Vision, Values, Purpose and Goals, even though we agreed the basic ideas at the workshop.

Often when you see the statements written by other organisations, they may appear simplistic. However, what is important for us is that our statements of Vision, Values, Purpose and Goals really mean something to us and capture the essence of what we are trying to do.

A real test for these statements is that they should stop the Club doing things in the future that are in conflict with them. For example, we agreed that we want to develop and maintain the friendly, warm and informal atmosphere the Club is known for. We would therefore not wish to seek a liquor licence or include “pokies” in the club because it would threaten the atmosphere we value, despite the possibility of increased revenues.

Some planning processes use terms different from the ones we did but, in essence, the underlying ideas are the same. You can see the Vision, Values, Purpose and Goals our Club finally agreed upon in [Appendix 1: Strategic Plan Executive Outline](#).

**Reflection:** Our final statements should be short, memorable and full of meaning.

## 9. DEVELOPING THE STRATEGIC PLAN

**Key Issue:** Allowing the opportunity and time for everyone involved to develop and work through the key elements in the draft Strategic Plan, feel comfortable with and make a commitment to the options identified and chosen.

Using the information in the background papers and the contribution of the workshop results, the consultants commenced drafting the Strategic Plan. This was a “back and forth” process taking several months as the Project Executive and the Project Advisory Group considered many drafts. Suggestions for additions, deletions and other changes were discussed and progressively incorporated in the latest draft.

This process took a long time, partly because most people involved were volunteers and there were only limited opportunities to meet and discuss that latest versions or proposals in the Strategic Plan draft.

However, the important reason for taking time was that it allowed all the ideas and suggestions involved to be developed in more detail, better understood and the implications for the Club appreciated. So, the months it took the Club’s Committee of Management and Project Executive to arrive at an agreed draft of the Strategic Plan document was a necessary and productive time, even if it took longer than expected.

It provided everyone involved with the time and opportunity to:

- Develop the detail of what had been broadly agreed at the one-day workshop and clarify our thinking.
- Understand the implications for the Club of particular choices we were making.
- Check that there were no “nasty surprises” or unwanted outcomes in the choices we were making.
- Carry out additional investigations or research in areas that we agreed needed to be covered.
- Consult further with members and with key people in government.

- Make final choices and a commitment to the content of the Plan.

As the Plan is available separately to interested organisations, the actual contents of the Strategic Plan we finally agreed upon are not included here except as a summary (in Appendix 1).

**Reflection:** This stage of the process can take a long time, longer than expected. It requires patience and a willingness to undertake extra tasks not initially anticipated as part of the process by all involved. It means developing clarity, a feeling of comfort with the direction identified and a commitment to it.

## 10. CHOOSING OUR STRATEGY AND GOALS

**Key Issues:** What is our central or core strategy and how is it different from other possible strategies?

What are the few really key Goals that will enable our chosen strategy to be achieved?

Choosing the Club's central strategy or approach in achieving its Vision and carrying out its Purpose is done at the same time as the development of the Strategic Plan described in the last section. But this is so important that we thought we would say a little more about it. The key Goals that we chose must also match and support the central strategy.

Put simply, the strategy is the way we chose to achieve something we want. For example, if the objective is to travel to another city, the strategy is the way we choose to travel to that city. For the Club, the choice of strategy is far more complicated and extends over ten years. We can have a strategy for really big objectives, the Vision in our case, or for smaller objectives over shorter time periods.

Choosing a strategy involves choosing one approach (or set of approaches) to doing something and generally excluding other approaches. So the choice we make is important and we have to feel it is the right choice for us. Choices also have consequences!

To illustrate this, in the Strategic Plan our Club has indicated it will:

- **Grow the size of its membership to meet some of the expected growth in demand from people aged 50-plus** – however, our Club facilities would not be big enough to accommodate the expected growth in members.

- **Undertake a re-development of the Club’s premises to accommodate the expected growth in members and to provide better facilities** – but the Club does not have the money or cash flow to pay for the substantial cost of re-development.
- **Seek external help from the ACT Government and/or private developer partners to help finance the re-development** - this means the Club has to be very clear what it wants and what is important to it so that these are not put at risk when external groups work with us.

As part of our central strategy, these choices are serious ones for us and could not be taken lightly. We do have to understand them, be comfortable with what they involve and be committed to them.

We also chose four Goals to support our central strategy in the areas of:

- Development of Club activities and services to meet the needs of current and future members.
- Growth and development of the membership.
- Development of the Club’s building and physical facilities.
- Effective management and financing of the Club.

These four Goals are long-term goals and may take some time to achieve, but they can be changed as our situation changes.

**Reflection:** Many of us do not find it easy to think strategically and logically about our objectives and strategies for too long. We usually need help from those individuals who have developed the skills to do so.

## 11. IDENTIFYING OBJECTIVES AND ACTION PLANS

**Key issue:** There are so many objectives for each Goal. How are we going to organise and manage them so we can do them?

All of our four Goals are large long-term “big” objectives. To be able to achieve them we had to break them down into a number of more modest objectives. We finally decided on 24 objectives as our initial starting point in working towards our Goals.

For example, for our Activities and Services Goal we have five objectives. Two are:

- Undertake an annual survey to determine members' needs for activities and services.
- Provide computer and internet facilities for members and associated training.

Each of these objectives involves a new task, additional effort and some specialist skills. There are another 22 objectives, so when put together they looked rather daunting as we are all volunteers working for the Club on a part-time basis.

As most of the work needs to be done by volunteers, the consultants decided to prepare Action Plans for each objective to provide guidance to the individuals or sub-committees tasked with carrying out, or overseeing, the achievement of the objectives.

Each Action Plan consists of a *document* detailing the background which gave rise to the objective and a description of what was to be achieved, plus a *table* listing the steps needed to achieve the objective: who is responsible for each step, and who has responsibility for decisions and authorisations. An example of one action plan is provided in [Appendix 2](#).

Copies of the Action Plans are available if required.

**Reflection:** The tasks generated by the development of a Strategic Plan were very daunting. However, we are in charge and can choose to go as fast or as slow as we wish. It is up to us!

## 12. CHECKING OUR MANAGEMENT CAPACITY

**Key Issue:** Do we, and does our organisation, have the skills, abilities and time to implement our Strategic Plan?

Despite our ability to choose the pace at which we implement our Strategic Plan for our future, there are still important questions about our capacity to do so.

Our President, Office Bearers and Committee members are all unpaid volunteers with a range of skills and abilities, but not necessarily all the ones needed to implement and manage the Strategic Plan. We were also aware that our organisation is managed in a somewhat ad hoc manner, not unlike many

other community groups. We also have a part-time Administration Officer who already has more to do than he has time for.

So we chose to pay special attention to our organisation's capacity and management approach. One of our consultants took responsibility for this. This produced a number of proposed changes to remedy identified weaknesses, including:

- A modified organisation structure with a smaller Committee and a number of Sub-committees for specific groups of tasks.
- A position for a Club Manager responsible for coordinating and managing all the aspects of the Club's day to day tasks.
- Development of a culture of teamwork and collaboration between all people undertaking jobs for the Club.
- Greater use of the experience and expertise of people in the community who are not members.
- Better use of the members' volunteer spirit by giving better support and clarity of roles to those who volunteer.
- Installation of a computer-based accounting system and hall-hire bookings system.

We are still in the process of implementing these proposals and building our capacity. They will take time for the same reasons the Action Plans will take time. We also need additional funding to increase the level of paid staff needed for core jobs.

**Reflection:** Organisation change is a big challenge for us, which we did not expect to have to deal with after retiring. But it is necessary if we are to implement our Strategic Plan.

### **13. BRIEFING OUR MEMBERS**

**Key Issue:** How do we communicate with our members and keep them up-to-date?

Our Club is a democratic organisation like most community groups. The members ultimately control the Club, elect the office bearers each year and complain if they are not happy. The elected President and Committee run the

Club on a day-to-day basis in a way they believe the members will be happy with.

While the initiative for the Strategic Plan Project came from the President, The Administrative Officer and the Committee, it was also clear the members had to feel happy with it and what it could produce. The fact that a substantial grant had been given to finance the project helped in the project's acceptance, but any change to the Club would be of concern to members.

Communication to the members was intended to be by:

- **Regular use of the *Meridian*, the Club's bimonthly newsletter** – in reality, the *Meridian* proved the most consistent mechanism for communication to the members. Short articles about the project were in nearly every issue. However, they may not have been read by all members or fully understood.
- **Placing copies of Committee meeting minutes on the Club's notice board** – the minutes of Committee meetings were often not put out, and this contributed to a sense of things being less open than some members would have wished.
- **Occasional members' information meetings on the project** – sometimes it needs a more interactive medium and forum to really get across a full understanding of concepts and ideas, which the printed word cannot do. The occasional member's meetings did prove effective in this respect, but they were infrequent.
- **Wall posters and notices providing summary information** – at latter stages of the project it was intended to place them on the walls of the Club premises, but it did not happen due to time and resource pressures. As a visual displays can be effective it may have been a "missed opportunity".
- **Occasional handout papers and summaries for members** – on specific aspects of the project (eg the members' survey results). These were infrequent, but important for members. They were placed in the lobby to be collected any member who wanted one.

We were conscious that members join the Club for various reasons. Some will be happy to attend activities but take no particular interest in the Club functioning. Others will be active in some management or other volunteer role. Some will be resistant to change, while others will look to possibilities for a better Club. Accordingly, not all the members expressed active interest in the project at various points. This was probably due to several things, for example, having trust in the process and those doing it, satisfaction with the reporting process or a lack of interest in the project at the time.

Nevertheless, towards the end of the project fears and rumours started to grow among some members about the re-development of the building and related changes. This led some members to develop a strong interest in what was going on.

This was followed by a general meeting of members in which up-to-date information was provided and the most concerns and fears dealt with effectively. Being prepared to hold a general meeting of members was an important way of responding to these concerns when they arose.

The informal process of communication probably worked well for those members who spoke to the President or Committee members about the project. Other members, who didn't do this, were more dependent on the *Meridian* and other written sources of information about the project.

**Reflection:** Interest in our Strategic Planning project was often greatest when some members had concerns and fears about possible changes to the Club.

## 14. PUBLISHING THE PLAN

**Key Issue:** Who is the Strategic Plan for and how many copies do we need?

We noted earlier in this document that the printed Strategic Plan document is the end result of a long process and represents the understandings and agreements reached by all involved about the future direction of the Club. It starts to become obsolete after it is finished. Nevertheless it is a valuable tool. It does two important things for us:

- It reminds all involved in the project, and Club members generally, what we are trying to do when we refer to it.
- It provides us with a succinct outline of what the Club is about for other people who do not know us well.

So who is the finished document for? We decided it was an important document for us to use in approaching the ACT Government and other groups and individuals from whom we may seek help. Therefore, it needed to be designed and laid out well and printed professionally. We added some colour photos to bring it to life and to communicate some of our activities and people.

By looking around we found a printer prepared to do the job at a modest cost, using an economical Xerox process. It was decided to print 100 copies of the Strategic Plan in colour. The plan will also be placed on the Club web site when developed, and extra copies can be printed from a computer if needed.

**Reflection:** The Strategic Plan document is the end point of a long process. The document is important, but the strategic planning process leading to a shared understanding and agreement is the most important thing.

## 15. IMPLEMENTING THE PLAN

**Key Issue:** Finding the way to start and the persistence to continue?

The Action Plans, together with the Strategic Plan itself, provide all the documentation we need to starting implementation. However, it remains a challenging task to do so. It is up to us with our current skills, abilities and commitment. But we can set our own pace and there are people in the community and in the Club itself happy to help.

We also decided to continue with an advisory group of interested and committed community members who could help guide us in the more complex areas of our Club's development. This type of group had proved valuable in the development of the Strategic Plan.

We also need to work towards a stronger organization and management capacity to facilitate our on-going implementation. What is needed is detailed in some of the Action Plans.

**Reflection:** The journey of a thousand miles starts with one step.

Choose your travelling companions wisely.

## 16. CHECKING OUR PROGRESS

**Key Issue:** How are we going?

Objective number 24 states:

*Present an account of the actions taken to implement the Goals and Objectives of the Strategic Plan at each Annual General Meeting of members.*

This should be sufficient, providing we monitor our progress through the year

**Reflection:** It is up to us!

## 17. ISSUES AND LESSONS

**Key Issue:** What would we do differently, if we did it all again?

Development of a comprehensive strategic plan for a community organisation can be demanding on those involved. The process cannot be hurried – sufficient time needs to be allowed for consultation and discussion, consideration of drafts and rewriting of documents.

In our haste to get started on the review after being awarded the CCF grant, insufficient time was given to the terms of reference. As a review can only be as good as its terms of reference, we would give this aspect higher priority next time around.

Fortunately, the Club chose wisely by appointing consultants who did more than could reasonably have been expected of them. They provided secretarial services and kept meticulous minutes for the large number of meetings convened during the study. They also went well beyond their brief in generating the papers listed in para. 4 of Appendix 1. These background papers were vital to the conclusions of the Strategic Plan. Lastly, they shepherded the Plan through its various drafts at the printer, as well as preparing the detailed Action Plans – a substantial 70-page document which puts meat on the bare bones of the review. The consultants have continued to assist the Club through the launching of the Plan and the implementation process. We were fortunate in this regard.

There is often a lot of help available in a community to support a community group with a project like this. This may be in government, in the private sector or in the community at large. The Club was able to access this help.

Some club members are likely to be very interested in the strategic planning process, but the majority will be happy to allow the club committee to take carriage of the process, but reserve the right to complain if they think something they value is under threat. Consultation with members is vital during the development of the plan, as well as afterwards.

The member survey document was particularly important in this regard. Personal contact by the Club President with members was an important feature in encouraging completion of the survey. A strategic plan needs to be “owned” by the organisation. Accordingly, the consultants sought frequent agreement to proposals and the wording of documents.

Much effort has gone into the development of the Strategic Plan document and the associated Action Plans. However, the benefit will be lost if processes are not put in place to implement the Plan, to report on progress and to review the continuing relevance of the approach. We realised our current managerial and organization capacity is insufficient to implement the Strategic Plan, and needs strengthening.

**Reflection:** Strategic planning is a bit like life. It is an ongoing process of responding to our reality, not just a document at a point in time.

## 18. CONCLUSIONS

The process used was time consuming and challenging for us, but it ensured a good contribution from members, stakeholders and other community members who provided a valuable contribution.

The final Strategic Plan and the associated Action Plans will enable us to confidently approach Government, and others, for assistance in the Club’s future development. It will also guide us in carrying out important improvements to our organisation and our management processes using our own resources.

This should place the Club in a sound position to deal with an increasing membership that an ageing population will bring.

We hope other seniors’ groups and community organisations benefit from our experience and our story. We wish you success in your process.

# Appendix 1: Executive Outline Woden Senior Citizen's Strategic Plan

1. The Woden Senior Citizens Club (WSCC) has been serving the Canberra community since 1972, in particular those in the "50-plus" age group. Following its establishment by a small group of volunteers, the Club has grown substantially and has adapted its activities and services to provide a broad range of options for around 600 members.
2. Early in 2003 the Canberra Community Foundation, in the ACT's Chief Minister's Department, provided the Woden Senior Citizen's Club with a grant of \$40,000 to:

*Research and develop a comprehensive 10-year plan for the social and physical development of the Woden Senior Citizens Club as a self-sufficient broadly based, socially responsive community service.*

The project was conceived as a strategic planning project that would take into account the demographic projections that anticipated a significant increase in the proportion of older people in the ACT by 2010, particularly in the Woden-Weston Creek area.

3. The Strategic Plan identifies broad directions and strategies to guide the Club in its development and management in the coming years. It also provides a framework for detailed action plans to assist in the implementation process.

## Strategic Plan Approach

4. The Strategic Plan was developed over 12 months, with the help of external consultants. It started with a review of those factors affecting the Club, now and likely to in the future. This resulted in several information papers:
  - *A Demographic Background Paper*, which examined trends in the population likely to affect future membership of the Club.
  - *A Comparative Survey of Organisations*, which examined other clubs and organisations providing services to the same age demographic or in a similar geographic area.
  - *An Organisation and Resources Paper*, which looked at the organisation of the Club and its financial resources.
  - A paper on the *ACT Territory Plan in Relation to WSCC*, which looked at how the Territory Plan might affect options for development of the Woden facility.
5. A questionnaire provided information about members, their activities and interests and their views on the future development of the Club. The responses were analysed and summarised in the report, *Woden Senior Citizen's Club Members' Consultation Survey*.
6. This phase culminated with a one-day workshop attended by 40 Club members and invited external participants. The latter were selected to provide an outside perspective. The Club's Committee of Management and the Project

Advisory Committee further considered the workshop outcomes during the subsequent process of developing the Strategic Plan.

## **Government Policies and WSCC**

7. Government policies have great significance for the Club and provide an important context for the development and implementation of its Strategic Plan. For example, the ACT Government, in meeting the needs of an ageing population, has stated that a priority for action is healthy ageing:

*We will focus on approaches that maximize the fitness and wellness of older people and promote positive and healthy ageing.*

8. WSCC thus provides activities and services, the environment and companionship that fully support the policy aims of the Australian and ACT Governments in promotion of healthy ageing. The Club also provides facilities for use by the community.

## **WSCC Today**

9. The Club holds the lease of a 3 070 m<sup>2</sup> block on the corner of Melrose Drive and Corinna Street in the Woden Town Centre - a prominent, valuable and convenient position greatly appreciated by members. The Club's facilities comprise a single-storey brick and timber building, with two halls and support areas of approximately 500 m<sup>2</sup>. It has several significant inadequacies in design and layout that will increase as membership grows.

10. The Club provides a venue for many member activities - ranging from the physical (table tennis, dancing and Tai chi) to the cultural (choir, recorder, painting). All provide, in addition, an important means of social contact in a place they feel they "own".

11. Just over half the members are over 70 and two-thirds are female. The majority of members come from Woden, Weston and adjacent areas. The Club is an incorporated association, managed by an elected committee and employs a part-time Administrative Officer. It has an annual income of about \$100 000.

## **Vision and Purpose**

12. The Club's guiding **Vision** and **Purpose** summarises its aspirations and intent and principle roles respectively:

### **Vision**

The community will see the Club as an important contributor to the healthy ageing of the over-fifties through its provision of stimulating physical, creative and intellectual activities; a welcoming, socially-comfortable and supportive environment; and efficient organisational arrangements. In particular, it will be recognised as a dynamic organisation responding to and representing the needs of its members.

### **Purpose**

Provide facilities and a range of activities that meet the interests of members and contribute to a physically and mentally active lifestyle for the over-50s.

Provide a welcoming and comfortable environment to aid the development of friendships and social interaction.

Provide emotional and social support to members in conjunction with professional support provided by Woden Community Services.

Through group or Club activities, contribute to the broader community.

Provide a community voice that represents the broad views and needs of members.

### **Key Issues and Conclusions**

13. The strategic planning processes led to a number of key conclusions about how the Club may need to respond in the future:

- i. Membership is likely to grow by 50% to 100% over the next 10 years, as a result of the increasing numbers of “50-plus” people, particularly those 60 to 70 years old.
- ii. This growth leads to a number of challenges, including how to promote the Club effectively; dealing with the impact of larger numbers on Club activities, the facilities and on the club’s management; as well as re-development disruptions.
- iii. The Club needs a development plan for renovation and/or redevelopment to provide for expected increases in numbers, resolve current building inadequacies, meet members’ expectations and to fit in with community needs.
- iv. Significant redevelopment of the Club’s facilities to meet the expected growth cannot occur without external funding from government or other sources.
- v. The Club is likely to be engaged in this strategic planning process, and possible renovations, for some years, so the Club must ensure a management capacity to carry out and support the increased workload and task complexity.

### **Club Strategy**

14. The Club’s overall strategy is critical in guiding its development in future years. It has been chosen based on research, review and consultation.

## The Club:

- Will be a major contributor in meeting the healthy ageing needs of the over 50s in the south Canberra area for the foreseeable future, but will not be the only contributor.
- Will make its key contribution by facilitating and hosting an expanding range of activities and services for both current and prospective members, in an atmosphere of friendliness, informality and mutual support so members feel “at home” in their club.
- Will not compete against larger clubs by seeking an alcohol licence, introducing gambling activities or providing large-scale catering facilities.
- Does not seek to provide all activities directly, but sees itself as providing flexible spaces and appropriate facilities for members and external groups willing to organise activities wanted by members.
- Accepts that it may need to limit on the size of Club membership so as not to damage the friendly and supportive atmosphere the members want and are attracted to.
- May expand in the future by development in other locations or promote the formation of similar clubs, alone or in conjunction with complementary long-term partners.
- Must optimise the use of facilities by hiring unused space to the community and secure a vital source of income for the Club, as well as contributing to the community.
- In its development, the Club will probably need external sponsors or partners who can contribute resources. It sees the ACT Government and private sector organisations as prime sponsors or partners in the Club’s future development.

## Development Options

15. The Club has decided to plan for the next 10 years on a minimum membership of 900 with potential to expand to 1300. It will need improved facilities to cater for the increased number of members and activities. Three broad development options are possible:

### Option 1 – Minor improvements

The Club would stay much as it is now but with minor improvements to the internal facilities and Club amenity, while still catering for some membership growth. The option does not correct existing health and safety problems; nor does it meet members’ requirements for better internal access and improved kitchen, toilets and sitting areas; nor does it provide more appropriate-sized rooms for the smaller activities. Greater numbers trying to participate in activities are also likely to cause dissatisfaction and contribute to a reduced rental income from external hirers. These improvements could be funded from Club reserves.

### Option 2 – Redevelop existing building

This would retain the current building but correct many existing problems and provide a more activity spaces. The probable approach would retain the two main activity spaces but redevelop around them to meet office, toilet, catering and

internal access shortfalls, as well as provide a range of smaller spaces. This could enable a significant expansion of membership while still maintaining the Club's amenity and providing the additional facilities that Club members want. Compromises in design would be necessary because of the existing layout of the building, and some problems may continue. It would need financing by a Government grant or other benefactor.

If this type of development proved unable to cope with the growth of members in the long term, the alternative approach would be the above redevelopment on the current site in conjunction with a new development on another site effectively providing two club facilities.

### Option 3 – Complete redevelopment

A full redevelopment could be done either solely for the Club, or as part of a major community centre, to provide the Club with all the spaces and facilities its needs. The project needs to be funded either by the Government and/or a developer. If the Government funded a major centre, it would probably be designed to meet the demographic requirement for perhaps the next 20 years and would provide facilities that could be used by other sections of the community.

This could have major advantages, but may also mean that the Club would lose the intimate atmosphere that makes it attractive to many members. Redevelopment with a commercial developer as a partner needs to be approached with care, as the developer's profits needs may limit the extent to which the Club can achieve the facilities it needs.

## **Implementing and Maintaining the Plan**

16. This Strategic Plan represents a consensus on the Club's current situation, the environment in which it operates, the opportunities and challenges it faces and the future the members would like to move towards over the next five to 10 years. It represents the result of a lengthy and comprehensive process of investigation, consultation, discussion and agreement by the Club's Committee of Management, members, advisors, supporters and consultants.

17. By implementing the goals and objectives in this Plan, the Club can continue to meet community needs and provide a valuable and even larger contribution in meeting the social, emotional and physical needs of an increasingly ageing population, that are well-recognised by governments.

18. Four key Goals and subsidiary Objectives have been established that set out broad targets for the Club. Target dates have been set, taking into account that most implementation will be done by Club members in a voluntary capacity. Separate action plans have been prepared for each Objective. The four Goals are listed in Attachment 1.

19. The development of this Strategic Plan would not have been possible without the generosity of the ACT Government in providing funding through the Canberra Community Foundation.

## Attachment 1:

### WSCC Goals and Objectives

Four key Goals and 24 subsidiary Objectives have been established that set out broad targets for the Club. Target dates have been set for each objective, taking into account that most implementation will be done by Club members in a voluntary capacity.

The four Goals are:

1. Activities and Services - Provide, develop and maintain a range of activities and services that support and appeal to the social and lifestyle needs of people eligible to be members of the Club.
2. Membership - Attract and maintain a membership that reflects the demographic composition of the Club's primary catchment area and grows at the rate of 5% to 10% per year consistent with Club's facilities and management capabilities.
3. Facilities - Identify, plan for and develop Club facilities that are effective in meeting members' expectations and needs, and the growth in member numbers over the next decade.
4. Management, Governance and Financial Management - Develop and maintain effective and responsible management, governance and financial management arrangements tailored to workload demands, business efficiency and the support needs of the Club in implementing its strategic plan as agreed and amended from time to time.

Separate action plans have been prepared for each Objective. These usually consist of one page outlining the background and proposed approach with a table showing specific action required.

An example is provided at Appendix 2.

## Appendix 2: Action Plan Example

### **GOAL 1 - ACTIVITIES AND SERVICES**

#### **Action Plan - Objective 5:**

#### ***Provide Computer and Internet Facilities for Members and Associated Training***

#### **Background**

About 50% of Club members now use the Internet. The Internet is becoming a major means of communication and of information retrieval. The Club considers it an important responsibility to assist those seniors who are not computer literate and cannot use the Internet to gain access, if they wish, and to develop other computer skills.

Many members may find the initial cost of computer equipment, as well as the ongoing cost of Internet connection and computer maintenance, unacceptable as a personal home expense. While it is possible to access the Internet via public libraries members have to compete with many others for access, and may feel sensitive about trying to use computers in a very public forum.

By providing four or five computers linked to one broadband connection the Club can provide both a training facility and Internet access in the Club's own congenial and non-threatening surroundings.

#### **Proposal**

A computer sub-committee would supervise the provision of training and Internet facilities. The committee would identify volunteer trainers from among the membership or from Club supporters. Initially at least some attendance by a supervisor would be necessary during the hours the computers were made available for Internet access.

A single contract could be let for computers, software, cabling and a linking hub to enable simultaneous use of the broadband connection. The contract should include a price for maintenance services, as required. Consideration could be given to using free or cheap second hand computers, but this would considerably complicate maintenance, and the sub-committee may find that new computers suitable for the simple uses of the Club are inexpensive. A user fee to cover costs will need to be determined. Consideration will need to be given to a suitable location in the Club pending any redevelopment.