

# Future Directions

## Strategic Plan 2006–2009





## Future Directions

# The Benevolent Society's Strategic Plan 2006–2009



In September 2004 we started a journey to reflect on our future and plan how to respond to society's evolving needs. This process became known as *Future Directions*.

There have been profound changes in the way Australians live which have affected The Benevolent Society's work. *Future Directions* has helped us identify a new purpose, which is to create caring and inclusive communities and a just society. Our *Strategic Plan* is the tool we have designed to help us achieve this purpose.

The way we go about our work is embodied in our identity as social pioneers and innovators. As Australia's oldest non profit organisation we have a proud record of 'firsts' in social welfare reform and health service delivery since 1813. We will continue on this path with further innovations in children's services, women's health, aged care, community building, social leadership and social ventures.

With our long and rich history, The Benevolent Society is well placed to develop innovative approaches to strengthening disadvantaged communities and seeking justice for all Australians.

Our success in bringing our purpose to life will depend on good planning and effective implementation. We plan to put our intellectual and financial resources into four key strategies that will help us achieve our goals:

1. Create and deliver leading edge Programs and services
2. Grow knowledge and intellectual capacity about social issues in Australia
3. Advocate and influence on key social issues and solutions
4. Build a thriving organisation.

These strategies will be the foundation for a series of actions designed to bring tangible results. Over the next three years we

will continue to develop our *Strategic Plan* in collaboration with our key stakeholder groups, including staff, service users, funders and friends.

The Benevolent Society has always been a leader in its field and *Future Directions* will help to ensure that our work continues to remain at the cutting edge. We invite you to join us on the next stage of this important journey.

Bill Webster  
**President**

Richard Spencer  
**Chief Executive Officer**





## **Our identity**

**We are social pioneers and innovators**

**We are creating new lines of thought, activity or methods of intervention to tackle the social issues facing Australia. We are focussing our efforts on pioneering creative ways to make communities strong and inclusive. This identity strongly links to our history of pioneering major initiatives, such as successfully lobbying for the aged pension and establishing Australia's first maternity hospital.**





## Our purpose

# To create caring and inclusive communities and a just society

The Benevolent Society has an important role to play in creating caring and inclusive communities and a just society. This means communities that are:

### Healthy and safe

People have access to clean water and air, adequate food, shelter and housing and good life expectancy, low infant mortality and good general mental and physical health. There are low levels of violence and injury and people feel their community is safe.

### Connected

People have strong family, social and support networks, good levels of trust and community and civic engagement.

### Productive and participatory

People are involved in employment, education, training, local politics, volunteering and contributing to community life.

### Rich in cultural and recreational activities

People can pursue their interests and feel a sense of connection, pride and achievement from their involvement in these activities.

### Just and fair

People are in a position to make choices about their lives and are involved in decision-making processes.





## Our services

We believe that building stronger communities is the best way to reduce social and economic disadvantage. We are working to:

ensure that **children** are nurtured and safe with their families, free from abuse and neglect

give **women** a voice and support them to move on from domestic violence

help **older people** to live independently for as long as possible and to age with dignity and respect

create opportunities through our **social leadership** Programs for people to lead change in their own communities.







## Our values



### Optimism

We are hopeful that even the most complex social issues can be solved and we work towards the best possible results for clients and their communities.

### Integrity

We are an ethical, trustworthy and responsible organisation. Those who come into contact with The Benevolent Society will experience us as open, fair and reliable.

### Respect

We show regard and appreciation for people from all walks of life and honour human difference and diversity.

### Collaboration

We work jointly with others as we believe that together we can tackle the things that prevent communities and society from being caring and just.

### Effectiveness

Our efforts result in us reaching and fulfilling our organisational purpose.







# The strategies to achieve our purpose



## Strategy 1

### Create and deliver leading edge Programs and services

Our Programs and services are creative and pioneering. This means they are flexible, aligned with purpose, informed by research and evolving to meet changing community needs.

## Strategy 2

### Grow knowledge and intellectual capacity about social issues in Australia

We are a knowledgeable and informed organisation, good at learning and sharing ideas. We are aware of emerging social trends and our research agenda contributes to society's understanding of these issues.

## Strategy 3

### Advocate and influence on key social issues and solutions

We have a clear and coordinated approach to advocacy and influence and are recognised as a significant voice on important social issues.

## Strategy 4

### Build a thriving organisation

We have systems and mechanisms in place that support our work and enable us to implement our strategies effectively.





## Strategy 1 Create and deliver leading edge Programs and services

Outcomes	Success Indicators (2006-09)	Year 1 Activities (2006-07)	Information sources	Reporting
1.1. All Programs and support services striving to be leading edge	<ul style="list-style-type: none"> <li>Support and processes in place to deliver leading edge services</li> <li>Leading edge initiatives reflected in all Business Plans</li> <li>External and internal awards recognise achievements</li> </ul>	<ul style="list-style-type: none"> <li>Agree a common understanding of 'leading edge'</li> <li>Rate our current organisational fit to 'leading edge'</li> <li>Adjust business planning processes as required</li> <li>Showcase examples to the organisation</li> </ul>	Business Plans Management reports	Report to Board annually
1.2. Stronger strategy and Program direction setting and alignment with purpose and values	<ul style="list-style-type: none"> <li>Business Case processes for new initiatives and existing Programs tested and implemented</li> <li>Programs effective and closely aligned with purpose and values</li> </ul>	<ul style="list-style-type: none"> <li>Develop, test and implement a Business Case mechanism</li> <li>Establish Board and Executive decision-making processes</li> <li>Prioritise Programs and services for examination</li> <li>Examine 20% of all Programs</li> </ul>	Service Reports Business case submissions Program reports	Report to Board twice annually
1.3. Innovative services explored and implemented	<ul style="list-style-type: none"> <li>Three significant initiatives in place</li> </ul>	<ul style="list-style-type: none"> <li>Research and learn about successful innovation models in other organisations</li> <li>Identify two initiatives to pursue and secure Board approval</li> </ul>	Progress reports Evaluation reports	Report to Board twice annually
1.4. Partnerships established with government for innovative service delivery	<ul style="list-style-type: none"> <li>Opportunities for innovation with government identified</li> <li>Approaches made to/received from government for innovation</li> <li>Partnerships in place</li> <li>Annual growth in partnership dollars</li> </ul>	<ul style="list-style-type: none"> <li>Develop and implement a Government Relationship Strategy</li> <li>Identify issues to discuss with government</li> </ul>	Contracts signed Progress reports Finance reports	Report to Board twice annually





## Strategy 1 (contd)

Outcomes	Success Indicators (2006-09)	Year 1 Activities (2006-07)	Information sources	Reporting
1.5. New models of support for older people developed and implemented	<ul style="list-style-type: none"> <li>New care models being planned or implemented</li> </ul>	<ul style="list-style-type: none"> <li>Define, research and develop new 'blended models' of care combining residential and community support</li> <li>Agree the Bondi master plan</li> <li>Commence blended model implementation</li> </ul>	Progress reports	Reporting to Board twice annually
1.6. New social leadership initiatives established in communities across Australia	<ul style="list-style-type: none"> <li>Three new social leadership initiatives underway</li> <li>Social leadership impact quantified and doubled</li> </ul>	<ul style="list-style-type: none"> <li>Agree a definition of 'social leadership'</li> <li>Hold a planning forum to determine direction and strategy</li> <li>Establish measures for evaluating the impact of social leadership initiatives</li> </ul>	Progress reports Reports on Alumni activities	Reporting to Board twice annually
1.7. Client needs better understood and client participation increased	<ul style="list-style-type: none"> <li>Clients and/or communities actively participating in service planning and improvement</li> </ul>	<ul style="list-style-type: none"> <li>Agree organisational expectations for client/community participation</li> <li>Audit current mechanisms/processes for connecting with clients/communities and identify changes or improvements needed</li> </ul>	Client evaluation results Service reports Business plans	Reporting to Board annually
1.8. Rigorous evaluation of what we do (service by service and as an organisation)	<ul style="list-style-type: none"> <li>Systems in place to evaluate service delivery and outcomes for clients/communities</li> </ul>	<ul style="list-style-type: none"> <li>Capture baseline information</li> <li>Develop and test systems</li> <li>Implement working group recommendations</li> <li>Pilot evaluation model in Centre for Children</li> </ul>	Evaluation report	Reporting to Board twice annually





## Strategy 2 Grow knowledge and intellectual capacity about social issues in Australia

Outcomes	Success Indicators (2006-09)	Year 1 Activities (2006-07)	Information sources	Reporting
2.1. Increased capacity to contribute to the social issues agenda	<ul style="list-style-type: none"> <li>Social issues agenda and strategy set annually</li> <li>Growth in organisational resources and effort</li> <li>Improved response to emerging social issues</li> <li>Mechanisms in place to record and evaluate internal/external contribution</li> </ul>	<ul style="list-style-type: none"> <li>Map current organisational capacity to identify and respond to emerging social issues</li> <li>Gather intelligence from other organisations with a strong record of issues-based advocacy</li> <li>Scope social issues agenda, systems, structures and resources</li> <li>Submit social issues plan for Board consideration</li> <li>Link to Sydney Leadership Network</li> </ul>	Social issues strategy report	Reporting to Board annually
2.2. Continuous learning across the workforce about contemporary social issues and practice	<ul style="list-style-type: none"> <li>Learning opportunities created across the organisation</li> <li>Workforce involved in external forums and groups</li> </ul>	<ul style="list-style-type: none"> <li>Audit current learning structures and support systems</li> <li>Identify and implement changes needed to ensure workforce is supported in learning about social issues and practice</li> <li>Develop a learning opportunities schedule</li> </ul>	Hours spent in engagement External participation reports	Reporting to HR Committee
2.3. Our research agenda influences policy and improves practice	<ul style="list-style-type: none"> <li>Research outcomes applied internally and externally to improve service delivery and contribute to social policy</li> <li>Research Program integrated with advocacy activities</li> </ul>	<ul style="list-style-type: none"> <li>Develop research agenda for Board approval</li> <li>Identify research structures and mechanisms</li> <li>Commission a significant piece of research</li> <li>Generate an Annual Research Report including details of application to practice</li> </ul>	Research report	Reporting to Board annually





## Strategy 3 Advocate and influence on key social issues and solutions

Outcomes	Success Indicators (2006-09)	Year 1 Activities (2006-07)	Information sources & reporting	Reporting
3.1. Better co-ordinated organisation effort in how we advocate and influence externally	<ul style="list-style-type: none"> <li>• Advocacy and influence model established</li> <li>• Pro-active systems in place to drive social issues agenda</li> <li>• Mechanisms in place for responding to advocacy opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Review our current approach to advocacy and influence</li> <li>• Research how other organisations handle advocacy issues</li> <li>• Establish a model of change for advocacy and influence</li> <li>• Establish recording systems to track activity</li> <li>• Develop and implement a relationship management system</li> <li>• Identify Sydney Leadership alumni who can contribute to advocacy activities</li> </ul>	A&I Annual report	Reporting to Board annually
3.2. Advocacy efforts focused on reducing violence and social isolation	<ul style="list-style-type: none"> <li>• Advocacy strategy in place</li> <li>• External stakeholders participating in advocacy projects</li> <li>• Influence and impact on key external decision makers measured and tracked</li> <li>• Organisational profile associated with finding solutions to identified social issues</li> </ul>	<ul style="list-style-type: none"> <li>• Define key messages – internal and external</li> <li>• Identify advocacy partnership opportunities</li> <li>• Present an Advocacy Strategy for Board approval</li> </ul>	A&I Annual report	Reporting to Board annually
3.3. Increased capacity and resources to deliver advocacy and influence strategy	<ul style="list-style-type: none"> <li>• Increased organisational focus on advocacy</li> <li>• Increased resources to support delivery of Advocacy Strategy</li> <li>• Formal mechanisms operating</li> </ul>	<ul style="list-style-type: none"> <li>• Identify resources required to implement the Advocacy Strategy</li> <li>• Develop a Resource Plan and an Implementation Plan to support the Advocacy Strategy</li> <li>• Strengthen links to Sydney Leadership and other external groups</li> </ul>	A & I Annual report	Reporting to Board annually



# Strategy 4 Build a thriving organisation

Outcomes	Success Indicators (2006-09)	Year 1 Activities (2006-07)	Information sources	Reporting
4.1. Increased funding secured to deliver new ideas and existing Programs	<ul style="list-style-type: none"> <li>Total non government funding increased annually</li> <li>Growth in corporate support</li> <li>Growth in individual giving and philanthropy</li> </ul>	<ul style="list-style-type: none"> <li>Review all non-government funding sources including investment policy</li> <li>Develop list of possible Programs to attract (ongoing) funding</li> <li>Develop strategies to increase philanthropy from individual and corporate supporters</li> </ul>	<p>Management reports Fundraising reports</p>	Reporting to Board twice annually
4.2. Business systems support implementation of Strategic Plan	<ul style="list-style-type: none"> <li>All organisational support systems improved</li> <li>Better approach to strategy and business planning and implementation</li> <li>Quality of decision-making improved</li> </ul>	<ul style="list-style-type: none"> <li>Assess business systems and identify areas for improvement</li> <li>Scope, prioritise and implement changes needed</li> </ul>	<p>Progress report Employee Survey results</p>	Reporting to Board twice annually
4.3. People working collaboratively across the organisation	<ul style="list-style-type: none"> <li>Project Teams established and assisting in delivering organisational results</li> <li>Increased cross-organisation collaboration</li> </ul>	<ul style="list-style-type: none"> <li>Define Project Team structures, briefs and evaluation processes</li> <li>Establish Project Teams for priority projects</li> </ul>	<p>Project team reports Employee Survey results</p>	Reporting to HR Committee
4.4. Workforce culture aligned with purpose and values	<ul style="list-style-type: none"> <li>Organisational values translated to behaviours</li> <li>Increased collaborative opportunities across the organisation</li> <li>Strengthened leadership connection and engagement with staff</li> <li>Cultural goals achieved</li> </ul>	<ul style="list-style-type: none"> <li>Define cultural goals for the organisation</li> <li>Review current culture and assess how closely it aligns with our purpose and values</li> <li>Develop a plan to achieve identified cultural and leadership goals</li> <li>Introduce a leadership development process for the Executive team</li> </ul>	<p>Employee Survey results (eg use of the Organisation Culture Profile)</p>	Reporting to HR Committee





## Strategy 4 (cont)

Outcomes	Success Indicators (2006-09)	Year 1 Activities (2006-07)	Information sources	Reporting
4.5. Volunteer potential harnessed more effectively	<ul style="list-style-type: none"> <li>Volunteers used more effectively</li> <li>Volunteers have a positive experience</li> <li>Volunteers have a beneficial impact on the organisation and the community</li> </ul>	<ul style="list-style-type: none"> <li>Establish Project Team to scope and develop Volunteer plan</li> </ul>	Volunteer survey Volunteer usage reports	Reporting to HR Committee
4.6. Governance practices improved	<ul style="list-style-type: none"> <li>Governance compliance</li> <li>Increased Board/stakeholder/client interaction</li> <li>Board performance evaluated regularly</li> </ul>	<ul style="list-style-type: none"> <li>Develop Governance statement</li> <li>Develop formal Induction process</li> <li>Develop Code of Conduct</li> <li>Develop formal succession plan</li> <li>Develop informal relationship opportunities for Board members</li> </ul>	Board evaluation	Reporting by Board annually
4.7. Stronger organisational profile and national recognition	<ul style="list-style-type: none"> <li>Organisational profile strengthened and Benevolent Society recognised nationally across key audiences</li> <li>Consistent marketing, branding and messaging across all Programs, materials and communication tools</li> </ul>	<ul style="list-style-type: none"> <li>Research how other organisations have successfully developed their brand identity and profile</li> <li>Conduct stakeholder analysis and define key messages for target groups</li> <li>Develop profile building plan for key audiences</li> <li>Redesign marketing and promotional materials and extend to services</li> <li>Develop a communications strategy which includes social research and advocacy</li> </ul>	Key stakeholders audit	Reporting to Board twice annually





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initiating change

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