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# Strategic Planning in Animal Welfare ... or how to get where you want to go

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#### Introduction.

As the Cheshire cat said in Lewis Carroll's 'Alice in Wonderland', "If you don't know where you are going, then it doesn't matter which way you go." This idea can be applied to many organisations that fail to plan for the future in an appropriate manner. So how does the need for strategic planning apply to animal welfare, especially if the organisation is not autonomous; that is, it is working within a larger organisation? In principle, the same considerations will apply to all organisations. Although such groups will have to "fit" their plan within a broader scheme, their particular focus and priorities will be specifically applicable to their special role. In the Animal Welfare League of SA Inc ("the League"), the Strategic Plan was able to be developed based on an independent organisation; however, this did not mean that no consideration was given to external influences. To the contrary, a critical part of the process is the focus on the organisation's "raison d'être", or reason for being. Of course, the League does not exist in a vacuum, nor does any other organisation. It follows then that key questions and considerations must include external influences. This particularly applies to interest groups with a strong attachment to the organisation; for example, partners, members, rate-payers and other clients, etc.

# Why have a Strategic Plan?

The aim of strategy is to develop a successful organisation and to achieve core outcomes, or objectives. Strategy is about "making decisions and choices that have a high medium to long-term impact on the activities of the business, and the implementation of those decisions." (Hubbard, Pocknee & Taylor, 1996, p.2 – 3). As has been implied, the danger to an organisation is in not having a plan. Without a broadly based, forward thinking and flexible approach to an organisation's activities, how is one to know if objectives, processes and outcomes are contributing to the organisation's mission and goals? In a nutshell, this cannot be done, thereby placing the organisation in jeopardy on a number of fronts by:

- Failing to fulfil the raison d'être, or mission, thereby making the organisation redundant. This is obviously the most dangerous threat.
- 2. Wasting resources through the pursuit of ill-defined and non-integrated tasks.
- 3. Focussing on incorrect priorities.
- 4. Failing to deliver the services required by the client.

We work within a world of chaos, complexity and change. We can either be controlled by these conditions, or we can control this environment through a strategic planning process. Working within the animal care, welfare and management field brings its own particular issues. Everyone working in this field will be well aware of the special set of conditions, considerations, and problems that working with animals (and their owners) brings. This knowledge needs to underpin and be woven throughout a strategic plan to ensure the fundamental basis of the plan is not lost. This process is particularly pertinent for elements working within a larger organisation due to the (general) lack of understanding of animal issues often found in the hierarchical structure.

### Who should have a Strategic Plan?

In a sense, everyone should have some sort of plan for the future. On an individual basis, this is generally known as setting "life goals". The same principle applies in organisations although, clearly, the scale and complexity differs markedly. In a specialist organisation such as an animal care or welfare operation, the need for forward planning should be self evident. A clearly enunciated, logical and practical plan can help the hierarchy understand what you are trying to achieve and how you intend going about it. This is an extremely powerful political tool to justify and achieve resource allocations and the "top cover" often needed to achieve your goals, especially in the generally misunderstood field that we work in.

## The Process.

Strategic planning is about long-term issues that require a commitment to a particular choice or choices of direction. This can involve commitment to resources requiring significant investment. It is about decision making, about integration and about implementation. (Hubbard, et al.) The following considerations will not guarantee a successful outcome, but they will certainly increase the likelihood of a worthwhile product:

- An inclusive approach. Ownership of any plan is critical to the success of the plan. A plan developed in isolation, without taking the opportunity to obtain valuable and constructive input from all the vested interest players, is at best weakened and at wost, highly likely to fail due to perceived irrelevance. This approach is a reflection of sound leadership principles and is applied by confident and progressive management. In the League example, input was invited from all membership and the review team was drawn from the Board, management, staff and volunteers. This structure has been maintained in successive annual reviews of the plan, with new people being brought in to inject new ideas and to challenge the status quo. A strong and honest approach, with all participants working on an equal footing is essential to a successful outcome. If participants are alienated or devalued, the strategic planning group will not achieve the best possible outcomes. More significantly, it will not be seen as an organisational plan, but one "belonging" to a particular individual or group.
- Research, consultation and assistance. There is a need to focus on the core elements of animal care and management from the outset. In this sense, there is a need to "know your business". Some of the review team will need specialist knowledge relating to core business to provide relevant and realistic input. Equally, it is worthwhile to have contributions from others who are not so closely linked to core business. Wide representation across your organisation as described above will generate the depth and breadth of inquiry needed to ensure all relevant parts are addressed. This will create the necessary level of discussion, questions and challenges to provide assurance that the outcomes do not just reflect the status quo. If your organisation does not have the inherent capability to conduct a strategic review, it is probably appropriate to import this resource to contribute to a successful outcome. Professional guidance at this early stage can provide a clearly defined process and directional control which will save costs and generate a

higher likelihood of a valid result. If the plan is a part of a larger organisation, it is appropriate and politic to include representation from your management group. This will help with acceptance of the plan at an early stage, will encourage supply of the necessary support to implement the plan (usually money), and accords with the concept of an inclusive approach to planning.

- **Development.** In the first instance, every organisation needs some form of Vision and a Mission. The Vision describes the ideal end state which an organisation might strive to achieve. This would tend to be the highest order and principle goal that an organisation pursues to justify its existence. This is the theoretical long term outcome that would show the organisation has fulfilled its destiny and reached it's most mature state. In other words, it is the principle goal that will always be strived for but is barely attainable. Visions tend to reflect either farreaching service or performance levels that rely on the highest order of quality. The establishment of the Vision will drive all other processes throughout the development and application of the strategic plan. The Mission usually consists of a simple and brief statement of the raison d'être. For what principle purpose does the organisation exist? Strangely enough, although this seems like a relatively easy step, obtaining agreement on a clearly defined Vision and Mission can be difficult and time consuming. However, do not despair. Agreement on these matters is critical to the remainder of the process, so the value of time spent at this stage will become self-evident as the process continues. From this point a number of sub-set activities can be developed. These are:
- i. Objectives. Objectives are defined as the principle measurable outcomes sought in the delivery of the product and/or service. These can be defined as the highest level of activity that contributes directly towards the achievement of the Mission. The key here is that the objective must be expressed in a form that can be measured. This might be in financial performance or customer satisfaction as external measures, and staff performance, development and quality levels will provide an indicator of internal effectiveness.
- ii. Priorities. As with most activities, there is usually a conflict between resource availability and the number of tasks to be achieved. This conundrum can be best overcome by prioritisation. Sometimes these will be set by the upper echelons, but at the least, you should be in a position to make recommendations on priorities for tasks if you do not have the autonomy to decide yourself. This is another benefit of a well thought through plan; it provides the information to help with these decisions.
- iii. Responsibilities. There is not much point in producing a plan if it is not clear who is required to implement it. As mentioned earlier, ownership and inclusiveness are critical components of any strategic plan. The key stakeholders should include representatives of those elements required to implement the plan and achieve the objectives. Responsibility for the various elements of the plan should be clearly identified in the plan along with timelines to complete objectives. In this way, there should be no surprises at the end of the process and the transition into the plan should be relatively seamless. This includes the assumption that all involved will be kept informed and any precursor processes, such as training and equipment acquisition, have been implemented.

# Use of development processes.

The manner in which the strategic plan is developed will, to a large extent, depend on a number of factors. These include available resources, the availability of and range of inherent knowledge and skills within the organisation and the normal internal working processes. Most significantly, the development requires a sense of commitment at all levels and an appropriate allocation of time. It follows then that without "top down" support, the resources and impetus will not exist to produce an effective outcome. The League approached the process through the use of a representative planning group, voluntarily broken into study groups to look at each of the major activities comprising the objectives. Results were reported back to the group for consolidation, then to the Board for progressive ratification and subsequently to the members for constructive criticism. There are many other alternative approaches that can be sought through referencing or through access to external assistance.

### Approval.

Approval and support is required throughout the process, especially if you are working at a functional level within a larger organisation. Report back to the parent body and other stakeholders to "keep them in the loop". This will allow adjustments to be made in a progressive manner, i.e., to align the plan to higher organisational positions for example. Such an approach will help to maintain ownership at all levels and the impetus to achieve the required outcome, resulting in a strategic plan that is workable and has the necessary support to be implemented.

## Application & Resources.

In most foreseeable scenarios, it is anticipated that strategic plans would be implemented immediately. This is not to say that all matters would be addressed at once due to the reality of time and/or other resource constraints. That is why the question of priorities must be addressed in the plan so that a clear sense of what is most important to the scheme can receive the most immediate attention and appropriate allocation of effort. Likewise with the identification and allocation of responsibilities, whereby the people or elements who have the carriage of various aspects of the plan have already been identified in the analysis process. It now becomes clear how the process of strategic planning provides a clear and unequivocal guide to the way ahead. Having established what has to be achieved and having gained the approval for these objectives, the support and resources required will be provided, usually however within tight budgetary constraints, to pursue the Vision and fulfil the Mission.

### Review.

The strategic plan is a "living document", designed to provide focus and an appropriate sense of priorities in the pursuit of identified objectives. As such, it is imperative that the plan should be frequently referred too, and reviewed at least annually, using the same general processes described above. This part of the process ensures that the plan remains relevant by providing for inevitable changes that occur within and beyond the organisation. It ensures continuous alignment to any master document of a higher organisation, and it provides some protection against and allows the opportunity to adjust to any variations to circumstances or unintended outcomes. It is useful in the review process to bring in "new blood" to challenge the status quo; otherwise the original group involved in the plan runs the risk of developing an overriding sense of ownership

that will inhibit change. Both the initial construct of the plan and subsequent reviews require moral courage, integrity and honesty for the process to be successful.

#### Conclusions.

Organisations need to look towards the future while learning from their past. To do so requires a rigorous, objective and honest investigation of the raison detre, or reason for being. This can take the form of a strategic plan that can provide an organisation with vision, a mission and objectives that are relevant and timely, from both an internal and an external perspective. A strategic plan that considers all aspects of operations, and includes representation from all vested interest parties, will generate ownership and provide clear responsibilities and priorities that will allow the organisation to pursue its Mission in a comprehensive manner. The principle outcome from this is the provision of relevant, customer focussed activities that will remain on course while providing the flexibility to adjust to the chaos of modern society.

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