

Unit A7 Establish strategies to guide the work of your organisation

Unit Summary

This Unit has been imported from the Management Standards

Overview

This unit is about strategic planning. This involves helping to create a shared vision and mission for your organisation, helping to define its policies and values, formulating objectives and strategies, and gaining support for the strategies you are proposing.

This unit is for you if you are a manager and you

- have responsibility for substantial programmes and resources
- have responsibility for the strategic development of your organisation
- have a broad span of control
- proactively identify and implement change and quality improvements
- negotiate budgets and contracts, *and*
- lead high-level meetings.

This unit contains four elements

A7.1 *Create a shared vision and mission to give purpose to your organisation*

A7.2 *Define values and policies to guide the work of your organisation*

A7.3 *Formulate objectives and strategies to guide your organisation*

A7.4 *Gain support for organisational strategies.*

To *create a shared vision and mission to give purpose to your organisation*, you need to consult with your organisation's governing body and stakeholders and take account of your organisation's nature and its values. You need to develop a mission which can help employees focus their contributions effectively, and you need to review the vision and mission on a regular basis.

To *define values and policies to guide the work of your organisation*, you need to consult with your organisation's governing body and stakeholders, provide values and policies which are clear and consistent with your organisation's vision and mission. You need to provide guidance on how people should respond under pressure, and you need to review values and policies regularly.

To *formulate objectives and strategies to guide your organisation*, you need to consult with your organisation's governing body and stakeholders and take account of your organisation's mission and values. You need to make sure the objectives are realistic, achievable and measurable, provide sufficient detail so that effective planning can take place, and revise your objectives and strategies to take account of changing circumstances.

To *gain support for organisational strategies*, you need to ensure that your strategies are consistent with stakeholders' interests. You need to achieve necessary compromises which balance any competing interests, present strategies in a persuasive manner and take regular action to ensure that support is ongoing.

Unit A7 Establish strategies to guide the work of your organisation

Key words and concepts

These definitions are provided to explain how key words and concepts are used in this unit

consultation	asking others for their views and involving them openly in decision making
mission	the long-term goal your organisation seeks to achieve
organisational objectives	clearly defined and measurable results which your organisation should achieve
policies	rules which govern the way your organisation deals with key issues, for example health and safety, employment practices or customer relations
stakeholders	all those who have an interest in, or may be affected by, your organisation and its activities; stakeholders may include, for example, shareholders, directors, elected members, employees, customers, suppliers, local communities and many others
strategies	long-term plans which will guide your organisation in achieving its mission
values	those things your organisation believes in and seeks to realise in its work, for example, customer service, team working, quality or value for money
vision	the model for the way you would like your organisation to be in the future

Unit A7 Establish strategies to guide the work of your organisation

Knowledge and Understanding

To perform effectively in this unit, you need to have knowledge and understanding in the areas of

- Communication
- Involvement and motivation
- Organisational context
- Providing support
- Strategic planning
- Working relationships.

You will find detailed knowledge requirements listed with each element.

Personal Competencies

In performing effectively in this unit, you will show that you

Acting strategically	<ul style="list-style-type: none">• display an understanding of how the different parts of the organisation and its environment fit together• work towards a clearly defined vision of the future• clearly relate goals and actions to the strategic aims of the organisation• take opportunities when they arise to achieve the longer-term aims or needs of the organisation
Behaving ethically	<ul style="list-style-type: none">• set objectives and create cultures which are ethical• identify the interests of stakeholders and their implications for the organisation and individuals• clearly identify and raise ethical concerns relevant to the organisation• work towards the resolution of ethical dilemmas based on reasoned approaches• understand and resist apparent pressures from organisational systems to achieve results by any means
Building teams	<ul style="list-style-type: none">• communicate a vision which generates excitement, enthusiasm and commitment
Communicating	<ul style="list-style-type: none">• listen actively, ask questions, clarify points and rephrase others' statements to check mutual understanding• adopt communication styles appropriate to listeners and situations, including selecting an appropriate time and place
Influencing others	<ul style="list-style-type: none">• present yourself positively to others• create and prepare strategies for influencing others• understand the culture of the organisation and act to work within it or influence it
Searching for information	<ul style="list-style-type: none">• establish information networks to search for and gather relevant information• make best use of existing sources of information• seek information from multiple sources
Thinking and taking decisions	<ul style="list-style-type: none">• break processes down into tasks and activities• identify patterns or meaning from events and data which are not obviously related• produce a variety of solutions before taking a decision• take decisions which are realistic for the situation.

Element A7.1 Create a shared vision and mission to give purpose to your organisation

The National Standard

This section provides criteria to assess whether you *maintain work activities to meet requirements* to the National Standard of competence. It also lists the knowledge and understanding which are essential for effective performance.

Performance criteria

You must ensure that

- a) your consultation with your organisation's governing body and appropriate **stakeholders** on the vision and mission is open, realistic and likely to engage their support
- b) the vision and mission you propose take into account the requirements, expectations and interests of your organisation's governing body and appropriate **stakeholders**
- c) the vision and mission you propose reflect the nature and values of your organisation and its role in the environment
- d) the mission is both challenging and realistic
- e) the mission helps members of your organisation to focus their contributions creatively
- f) your organisation's vision and mission are regularly reviewed in the light of **trends and opportunities**.

Range

both of the following types of **stakeholders**

- those with a direct contractual interest
- those with no contractual interest but affected by the organisation's activities.

both of the following types of **trends and opportunities**

- internal
- external.

Evidence requirements

You must prove that you *create a shared vision and mission to give purpose to your organisation* to the National Standard of competence.

To do this, you must provide evidence to convince your assessor that you consistently meet **all** the performance criteria.

Your evidence must be the result of real work activities undertaken by yourself. Evidence from simulated activities is **not** acceptable for this element.

Knowledge requirements

You need to know and understand

Communication

- the importance of consulting thoroughly with your organisation's governing body and all relevant stakeholders on the vision and mission
- the methods available to consult effectively on your proposed vision and mission, and how to select a method appropriate to the circumstances.

Involvement and motivation

- how to identify your organisation's stakeholders and identify and analyse their requirements and interests.

Organisational context

- key factors in your organisation's operating environment which impact on the formulation of vision and mission
- the values of your organisation which should be reflected in the shared vision and mission.

Strategic planning

- the importance of your organisation developing a shared vision and mission and your role and responsibilities in contributing to this
- how to develop and frame statements of the vision and mission and ensure they are challenging, realistic, and capable of winning support at all levels within your organisation and amongst your external stakeholders
- how to review your organisation's vision and mission to ensure they are up-to-date, relevant to emerging trends and opportunities and capable of guiding the organisation's work.

Element A7.2 Define values and policies to guide the work of your organisation

The National Standard

This section provides criteria to assess whether you *maintain work activities to meet requirements* to the National Standard of competence. It also lists the knowledge and understanding which are essential for effective performance.

Performance criteria

You must ensure that

- a) you consult with your organisation's governing body and appropriate **stakeholders** over **values and policies** in a way which is open, realistic and likely to engage their support
- b) you define **values and policies** which take into account the requirements, expectations and interests of your organisation's governing body and appropriate **stakeholders**
- c) you define **values and policies** which are clear and consistent with your organisation's vision and mission
- d) your statements on **values and policies** include guidance on how to respond when under pressure and how to respond when **stakeholders'** interests and organisational policies are in conflict
- e) you review the **values and policies** of your organisation regularly and ensure they take account of likely future circumstances.

Range

both of the following types of **stakeholders**

- those with a direct contractual interest
- those with no contractual interest but affected by the organisation's activities.

values and policies which cover both

- corporate principles
- legal requirements

and at least two the following

- internal relationships
- external relationships
- environmental impact
- cultural differences in other countries.

Evidence requirements

You must prove that you *define values and policies to guide the work of your organisation* to the National Standard of competence.

To do this, you must provide evidence to convince your assessor that you consistently meet **all** the performance criteria.

Your evidence must be the result of real work activities undertaken by yourself. Evidence from simulated activities is **not** acceptable for this element.

Knowledge requirements

You need to know and understand

Communication

- the importance of consulting thoroughly with your organisation's governing body and its stakeholders on values and policies
- the methods available to consult effectively on values and policies and how to select a method appropriate to the circumstances.

Organisational context

- your organisation's vision and mission and how these may affect the formulation of values and policies.

Providing support

- why values and policies need to provide staff with guidance on how to respond under pressure and resolve conflicts of interest.

Strategic planning

- the importance of your organisation having clear policies and values and your role and responsibility in relation to developing these
- how to develop values and policies which reflect the requirements, expectations and interests of your governing body and all your organisation's stakeholders
- the methods of regularly reviewing values and policies to ensure they are up-to-date and capable of meeting likely future circumstances
- how to select an appropriate method to review values and policies.

Working relationships

how stakeholders' interests and organisational policies may come into conflict.

Element A7.3 Formulate objectives and strategies to guide your organisation

The National Standard

This section provides criteria to assess whether you *maintain work activities to meet requirements* to the National Standard of competence. It also lists the knowledge and understanding which are essential for effective performance.

Performance criteria

You must ensure that

- a) your consultation with the organisation's governing body and appropriate stakeholders over **objectives and strategies** is open, realistic and likely to engage their support
- b) the **objectives and strategies** which you formulate take into account the requirements, expectations and interests of your organisation's governing body and appropriate stakeholders
- c) the **objectives and strategies** which you formulate are consistent with your organisation's mission and values
- d) the **objectives** are attainable within the agreed timescale and budget
- e) the **objectives and strategies** contain sufficient detail to allow the planning and development of specific programmes of work
- f) you take full account of the constraints upon **objectives and strategies**
- g) the **objectives** are achievable and measurable, and include the types of measurement criteria to be used
- h) your revisions to **objectives and strategies** take advantage of actual and anticipated changes in circumstances.

Range

all of the following types of **objectives and strategies**

- long-term and broad to achieve mission
- medium-term and specific to meet operational requirements
- short-term and specific to address threats and opportunities.

Evidence requirements

You must prove that you *formulate objectives and strategies to guide your organisation* to the National Standard of competence.

To do this, you must provide evidence to convince your assessor that you consistently meet **all** the performance criteria.

Your evidence must be the result of real work activities undertaken by yourself. Evidence from simulated activities is **not** acceptable for this element.

Knowledge requirements

You need to know and understand

Communication

- the importance of consulting thoroughly with your organisation's governing body and stakeholders on objectives and strategies
- methods available to consult effectively on objectives and strategies and how to select a method appropriate to the circumstances.

Organisational context

- the organisation's mission and values and their implications for developing objectives and strategies.

Strategic planning

- the importance of your organisation developing clear objectives and strategies and your role and responsibility in contributing to this process
- methods of developing, reviewing and revising objectives and strategies
- how to select a method of developing and reviewing objectives and strategies to ensure that they meet the requirements and interests of your governing body and stakeholders
- how to ensure that objectives and strategies are attainable within timescale and budget
- the level of detail required to enable effective planning throughout the organisation
- the importance of objectives being realistic, achievable and measurable and how to develop objectives which meet these criteria
- how to devise performance measures for objectives
- the constraints which are likely to impact on the formulation of objectives and strategies and how to respond to these.

Element A7.4 Gain support for organisational strategies

The National Standard

This section provides criteria to assess whether you *maintain work activities to meet requirements* to the National Standard of competence. It also lists the knowledge and understanding which are essential for effective performance.

Performance criteria

You must ensure that

- a) the consultations and negotiations which you carry out allow strategies to be influenced by, and made more consistent with, **stakeholders' interests**
- b) the compromises which you make to resolve conflicts in **stakeholders' interests** are realistic, balance these competing interests, and acknowledge the tensions between them
- c) you present strategies to **stakeholders** in a way which is likely to attract their support
- d) where **stakeholders** do not fully support strategies, you take action to minimise potential problems
- e) you consult with **stakeholders** on a regular basis and ensure that support for the organisation's vision, mission, objectives and strategies is available when needed.

Range

both of the following types of **stakeholders' interests**

- present
- future.

both of the following types of **stakeholders**

- those with a direct contractual interest
- those with no contractual interest but affected by the organisation's activities.

Evidence requirements

You must prove that you *gain support for organisational strategies* to the National Standard of competence.

To do this, you must provide evidence to convince your assessor that you consistently meet **all** the performance criteria.

Your evidence must be the result of real work activities undertaken by yourself. Evidence from simulated activities is **not** acceptable for this element.

Knowledge requirements

You need to know and understand

Communication

- the importance of consulting and negotiating on organisational strategies with your stakeholders to ensure these strategies reflect their interests
- methods to consult effectively on strategies and how to select a method appropriate to circumstances.

Involvement and motivation

- the importance of having widespread support for organisational strategies throughout your organisation and amongst external stakeholders and your role and responsibilities in relation to this.

Working relationships

- how to identify your stakeholders and their current and future interests, and analyse possible areas of conflict

the importance of making compromises to resolve competing interests and how to achieve acceptable and realistic compromises.