



Strategic Planning

Bristol SU Groups



BRISTOL SU
the best student life

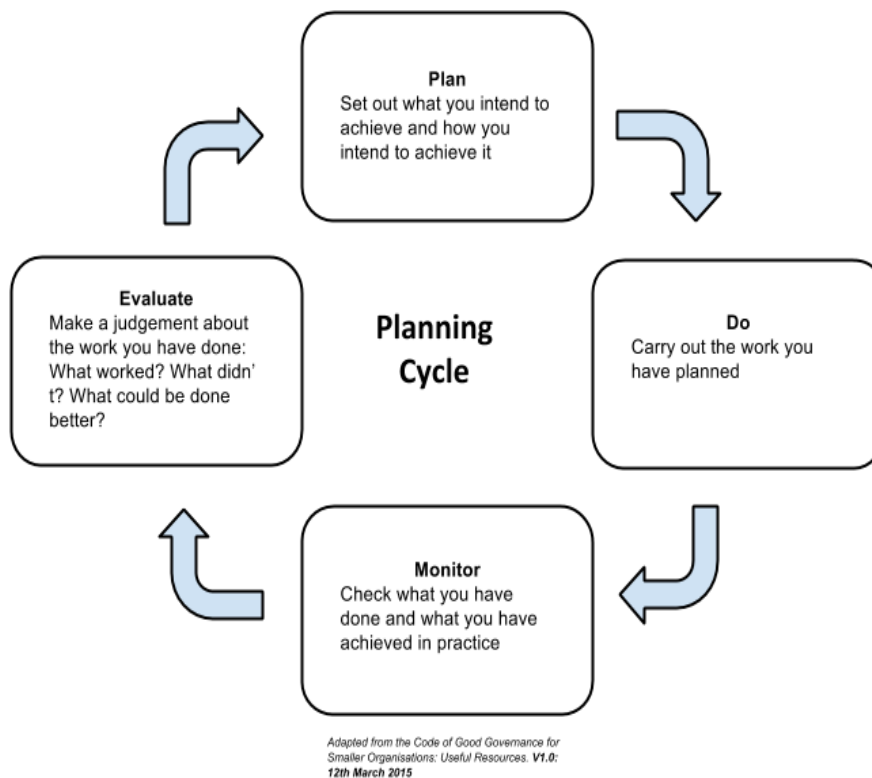


Contents

Strategic Planning for Bristol SU Groups	3
Appendix 1: Annual Review	7
Appendix 2: Supplementary Information	8

Strategic Planning for Bristol SU Groups

Effective planning is the cornerstone of strong organisations. Your group should use this planning toolkit in conjunction with the handover form and financial planning toolkit to develop strong and strategic plans. These documents should make up your first step on your annual planning cycle. While putting your plan into action you should be ensuring that you are monitoring against your objectives. At the end of the year you will be able to look back and evaluate – this is critical for the handover process and the long term success of your group.



The following sections and questions should be used as prompts for discussion across your committee and wider membership. Feel free to adapt this document to suit your group's needs. If you would like support with running planning sessions with your committee please contact [redacted] and we will try to help facilitate them.

TIP: You may find it useful to begin by completing 'Appendix 1: Annual Review' before the rest of the document

Name of Group

Mission Statement

One sentence distilling what your group's purpose is. Be clear, but not detailed. E.g. [Name of group] exists to... Do what? For who? In what area? This should directly link to the aims in your constitution!

Values/Beliefs (optional)

Our group is committed to ... what? These can be passionate and engaging statements if written well - they are about core beliefs. They describe the value system under which the mission is carried out.

Background/Context

A short summary of relevant organisational history leading up to your current position - the starting point for the plan. Likely to include date of founding, status of group (UBU Club, UBU Society etc.), organisational structure, size etc. Often includes details of recent achievements and status of ongoing projects. Importantly, includes a review of the current position, including information about changes/ trends affecting the organisation and about the need for what you plan to do.

Strategy

Series of fairly broad statements about the focus and direction of the group, each of which supports the mission statement. They describe where the group will focus its efforts. These statements follow on from the Mission, usually via the word "by" - "Our organisation exists to... and we intend to do this by...". Strategic statements need to be linked to outcomes – what will be different as a result of your work? How will you know and how do you plan to measure these changes?

Resources

How will the objectives affect the group? What will it need to carry them out? Identify the resources which will be needed to achieve the objectives, primarily Finance, People, Information and Equipment/Facilities.

Risk Management

Identification of the potential risks to you not achieving your objectives and how you will minimise and/or mitigate those risks. For example: How would you cope if a key committee member resigned? What would you do if you lost a major sponsor?

Plan Summary

One paragraph summarising the plan's key points - what would you say if you only had, say, seven sentences/bullet points to say it in?

Ownership

Say who created the plan, including all those who had input to it or were consulted about it.

Date plan passed by your committee:

Appendix 1: Annual Review

What went well over the previous year?

What didn't go so well?

What did you learn?

What would you do differently?

Appendix 2: Supplementary Information

Alumni Relations

How do you work with your alumni? Do you have an Alumni membership scheme?

Membership Engagement & Participation

What do you do for your members? How have you involved them in your group? If you are a Sports Club how many teams do you run and how many ways are there for new members to get involved?

Events, trips & competitions

What large events and trips do you organise? What competitions and tournaments do you enter?

Community Outreach

Does your group run any volunteering activities in the local community? Does your group do any fundraising for charity?