



ALZHEIMER'S AUSTRALIA NSW

CASE STUDY

Shared planning: Letting staff determine your direction

"In my role as CEO, I saw that my job was to find out what the board and staff wanted and to give life to those views..."

The Hon John Watkins, Alzheimer's Australia NSW CEO

In the face of the expected dramatic growth in dementia and threats to its funding, Alzheimer's Australia NSW (AlzNSW) needed to create a strategic plan to provide direction for the next five years. SVA Consulting worked with the \$10 million non-profit to create the planning process which achieved high levels of buy-in from the 100 staff.

No clear strategy in place

Alzheimer's Australia NSW had no clear strategy in place to tackle the changes in population which were resulting not only in more people with dementia but new geographical areas with high rates of dementia. Also one of AlzNSW's main funding sources was due to be restructured which could impact heavily on its funding. As a result, AlzNSW wanted a strategic plan to provide a clear direction for the organisation.

Effective change needs to engage people

With a background in politics, AlzNSW CEO, The Hon John Watkins believed that the most

effective way to get good change is to engage people. He also wanted the process to reflect the organisation's values by being collaborative, open and more democratic.

This approach of having no fixed hypothesis about the organisation's path allowed the facts and the insights of staff and other stakeholders to guide the planning outcome.

SVA Consulting worked with AlzNSW to design the process so that, at each step, staff were consulted and involved in a way that led to engagement and ownership rather than a vague direction.

Three step process

- Develop a common base of facts so that everyone was on the same page
- Elicit insights from stakeholders using their expertise to analyse the facts, and
- Have the senior management team develop the strategic goals based on these insights.

To help draw out the insights, a framework based on gaps, overlaps and opportunities was used

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and applied in three areas: the geographical location of services, the beneficiary group, and the stages in the dementia journey.

SVA Consulting gathered insights directly from the Board, the management team and staff (via an online survey) as well as through a steering committee, which included middle management from Sydney, regional staff, members of the Board as well as external clients and experts.

Based on these insights, the seven general managers supported by SVA Consulting articulated what they wanted the organisation to achieve in the next three years – and what it needed to do to get there – wrestling with the various priorities, insights and needs to choose the organisation's goals.

The process also sought feedback from staff about the challenges of implementing these goals.

Major findings

There were several common themes that emerged. Three of the most important were that:

- Geographically, there was a significant service gap in the Tweed, Illawarra and Western Sydney areas.
- There was a need to support people with dementia and their carers in the critical moment after they receive their diagnosis.
- The organisation had a particular strength in raising awareness of dementia, promoting brain health and reducing stigma in the general community.

High levels of staff buy-in

By not having a predefined answer or path, this approach created high levels of staff buy-in and commitment to the plan. For the senior management team, who developed the plan, the process also helped to build relationships and knowledge about each other's areas and how each other worked.

The process kept staff well-informed and the managers who participated in the steering committee were empowered.

Some of the goals, such as the need to increase exposure and effort in Western Sydney were accepted by staff without question and AlzNSW soon began delivering services there.

By planning without a starting hypothesis, the organisation came up with both a focused direction and a team of people aligned behind it.

ABOUT ALZHEIMER'S AUSTRALIA NSW

A \$10 million non-profit with 100 staff, AlzNSW has been providing services for people with dementia and their families and carers for over 30 years. With strong roots in the community, it provides advocacy, support services, and education across NSW through its North Ryde head office and nine regional centres or hubs.

"The fact pack built legitimacy of the process. It gave us confidence and certainly impressed the board. It was clear that SVA understood us."

The Hon John Watkins, Alzheimer's Australia NSW CEO

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