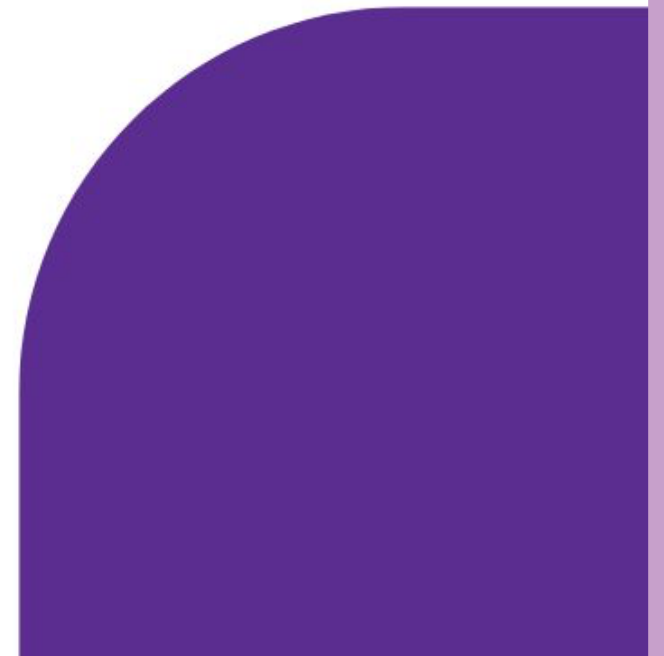




Strategic Plan

2024-2027



The Biography Program – Beyond Words

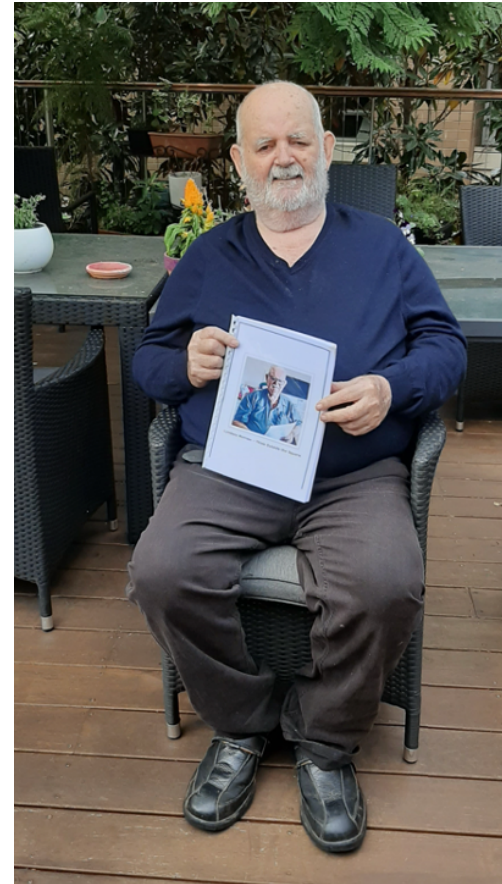
2024 – 2027

Enriching the lives of senior community members with a purposeful and respectful biography service

PREAMBLE

Beyond Words preserves the legacy of seniors by listening, recording and writing biographies.

Our volunteer-driven organisation provides meaning for both authors and volunteers by recognising authors' unique stories, fostering connections across generations, ensuring the experiences of our seniors are celebrated and cherished.



VALUES

- Compassion
- Dignity
- Respect

PURPOSE

We record and share seniors' life stories to preserve their legacy, reduce social isolation, support wellbeing, and provide meaning and purpose for volunteers.



PRINCIPLES

- **Honoring Individual Narratives:** We believe in the inherent value of every individual's life story. By actively listening and documenting the personal journeys of our seniors, we strive to honor and validate their experiences, creating a lasting testament to their unique lives.
- **Fostering Connection:** Beyond Words is dedicated to building bridges between generations. Through the act of sharing life stories, we seek to cultivate empathy and understanding among generations, fostering meaningful connections that transcend age, background, and circumstance.
- **Preserving Legacies:** Our mission includes preserving the invaluable legacies of our senior community members. We are committed to documenting the experiences and achievements of each individual, providing a tangible and lasting legacy for their families and communities.
- **Enriching Lives:** The process of crafting biographies is a mutually enriching experience for both seniors and biographers. By engaging volunteers to listen, write, and share, we create a sense of purpose, fulfillment, and connection within our community.
- **Empowering Volunteers:** Beyond Words provides a platform for volunteers to impact others' lives. Through training, support, and a collaborative environment, we empower our volunteers to contribute their time and skills to a worthy cause that fosters a sense of community and shared purpose.

DEFINITIONS

The Board

- The elected governing body of The Biography Program, trading as Beyond Words, responsible for overseeing operations and the strategic direction of the organisation.

Aged Care Providers

- Umbrella organisations serving seniors, including Aged Care Residences

Aged Care Residences

- Also known as Nursing Homes or Aged Care Facilities.

Seniors

- Clients of Beyond Words, usually residents of Aged Care Residences, aged 60+

Authors/Storytellers

- The client of Beyond Words who is telling their story.

Biographers

- The Beyond Words volunteer who questions, records, transcribes, and compiles the client's life story

Sponsors

- Supporting individuals/organisations who provide financial and other resources.

Partners

- Organisations that we work with for agreed outcomes (e.g. train their volunteers).



STRATEGIC PLAN OVERVIEW 2024-2027

PURPOSE

We record and share seniors' life stories to preserve their legacy, reduce social isolation, support wellbeing, and provide meaning and purpose for volunteers.

VALUES

- Compassion
- Dignity
- Respect



GOAL SUMMARY

Governance

1. Build a sustainable and effective Governance structure serving the interests of our owners – authors, biographers and partner organisations.

Goal	Method	Targets and Measures	By when /Timeframe
<i>1.1 Beyond Words governance reflects stakeholders' interests, with an appropriately skilled Board and an engaged community of volunteer biographers at its core.</i>	Board operation to work to an annual calendar including four in-person 'deep dives' (topics include analysis of operational issues, risk management, succession, strategic and business/financial planning and review, biographer engagement, support, and retention).	Board members' and stakeholders' feedback and satisfaction survey.	Annual
	Key strategic decisions will include a process for member consultation.	Identify and achieve the mix of skills targeted for the Board.	By 31 Dec 2024. Review annually.
	Maintain an appropriate skill-mix matrix for board members, to identify skills gaps and ensure a well-rounded, effective board.	Agree a set of protocols for Board meetings (including deep dives) that respects differences of opinion and fosters constructive decision making.	By 31 Dec 2024. Review annually.
	Increase the number of volunteers who are company members through raised volunteer support and engagement.	Over 50% of active volunteers become members.	Report quarterly

Organisational Goals

2. **Maintain a sustainable organisation that can deliver and develop our biography program and implement agreed changes, within achievable financial and people resources at a manageable pace of growth.**

Goal	Method	Targets and Measures	By when /Timeframe
<i>2.1 Establish and clearly document office holder, team and volunteer roles and responsibilities.</i>	Seek external guidance (Board Chair and Executive Officer)	Process mapping of all current functions and processes to identify risks and improvement opportunities.	6-12 months
	Develop templates and systems		6 months
	Define and document all paid and volunteer roles, responsibilities and delegations.	Document roles and succession plan.	Priority positions documented within 3-4 months. All positions within 6-9 months.
	Put in place a backup/ succession plan for key roles.	Appraise and review structure and positions.	Annually

Goal	Method	Targets and Measures	By when /Timeframe
2.2 Develop and sustain a sound funding base/support.	Refine membership and process for the Fundraising Committee. (No longer = whole Board).	Annual income targets reflect strategic, financial and operational plans and proposed growth. Targets are an additional \$40,000 2024-2025, \$30,000 2025-2026, \$50,000 2026-2027 above existing income. Set specific measurement targets for each fundraising activity and online donations. Ensure any contract training is adequately costed and funded (see 10 below).	Targets set and reviewed annually as part of budget process. Interim reviews as required where circumstances change. On a project-by-project basis, in line with agreed annual budget.
	Confirm and document, key role for our coordinator in supporting the Fundraising Committee and submission writing.		
	Identify Philanthropic Trusts and Foundations to be targeted along with a timeline of application and acquittal dates.	Identify a calendar of grant submissions for specific activities.	6 months

Goal	Method	Targets and Measures	By when /Timeframe
<p><i>2.3 Regularly review our BW activities and the structure that delivers them, to establish effectiveness, efficiency, and devise improvements. Ensure tracking of biography work is effective and measurable</i></p>	<p>1) Continue to review and improve our tracking of biographies, biographers and ACRs</p>	<p>Review of systems for tracking and measuring biographies to ensure meeting quantitative and qualitative goals</p>	<p>Annually</p>
	<p>2) Put in place an evaluation protocol for pilot and existing programs.</p>	<p>Evaluation of program/s by an independent researcher to identify opportunities for improvement.</p>	<p>Annually for biography program or following each project pilot.</p>
	<p>3) Seek partnership (e.g. university relationship) that assists in exploring suitable models of evaluation.</p>		<p>12 months</p>

Program

3. We will grow and improve the Beyond Words biography program, maintaining our primary focus as providing biographies for residents of Aged Care Residences.

Goal	Method	Targets and Measures	By when /Timeframe
<i>3.1 Work to continuously improve the effectiveness and quality of our core biography process and product.</i>	Review and confirm biography standards, e.g., biography length, cost, visual presentation, and provision of the online version.	Produce minimum of 60 biographies Year 1, 80 Yr. 2 and 100 Yr. 3 of 2024-2027 plan.	Review year-to-date progress quarterly. Review yearly to accommodate changing circumstances.
		Identify and maintain optimum cost per biography.	Report costs quarterly
		Develop a process to assess and improve the quality of finished biographies.	Within 6-9 months
<i>3.2 Gradually expand our geographic reach for the provision of biographies in aged care residences.</i>	Develop a gradual and sustainable program of development into aged care residences in Victorian regional communities, ensuring infrastructure support in situ.	Identify and scope one to two geographic areas of potential expansion for each calendar year, initial focus is Melbourne metropolitan, Geelong and Central Highlands.	Annual plan
	Ensure coverage of Melbourne metropolitan area.	Identify and scope one to two geographic areas of potential expansion for each calendar year, initial focus is Melbourne metropolitan, Geelong and Central Highlands. Report current biographer & assessor location (LGA) and perceived gaps by mapping with potential client facilities.	Quarterly

Goal	Method	Targets and Measures	By when /Timeframe	
3.3 Increase the pool of trained biographers and assessors available to meet developing demand.	1) Recruit, train and induct new biographers.	<ul style="list-style-type: none"> 30 new biographers will be trained per year. Plan an annual calendar of training activities to ensure that it is achievable and sustainable. 	Report year-to-date progress quarterly	
	2) Explore new avenues for recruitment (university students).		Annual	
	3) Ensure recruitment of new biographers reflects geographic, skill and experience needs.	Evaluate each recruitment program for opportunities for improvement.		Post each program
	4) Ensure training of new and existing biographers reflects changes to policies and processes.	Evaluate each training program for opportunities for improvement.		Post each program
	5) Ensure effective recruitment, training, and ongoing development of volunteer assessors			Report quarterly on assessor location
	6) Clarify the role of the assessor and plan appropriate recruitment, training and ongoing development.	Maintain a pool of assessors that covers all metropolitan regions and rural/regional areas where we have begun operation.		
	7) Implement suitable training in formatting & preparing documents for editing for new biographers as a follow-up to initial training.			

Goal	Method	Targets and Measures	By when /Timeframe
3.4 Improve the retention, satisfaction and performance of biographers.	Maintain a systematic approach to measuring biographer activities/performance, obtaining and acting on feedback and communicating/consulting with biographers.	Monitor and report biographer activity	Quarterly year-to-date and annual reporting
		65% volunteer retention per year	Annual Reporting
		Monitor and report biographer satisfaction and retention through surveys, feedback, and level of engagement.	Annual Reporting
		Conduct ongoing interviews with current biographers to determine significant themes requiring improvement.	Ongoing with quarterly reporting
		Monthly newsletter and biographer forum that encourages participation, consultation, and support.	Monthly
	Refine, develop and maintain a group of motivated and skilled assessors	1) Clarify the role of the assessor in providing ongoing mentoring and support of new biographers	Six months
	2) Encourage the development of local volunteer support groups based on geography.	Ongoing	
Recognise contributions to Beyond Words success by an annual recognition process	Put in place a recognition process, e.g. badges for key milestones (such as first, 5th, 10th, 20th completed biographies)	Annual awards	

Goal	Method	Targets and Measures	By when /Timeframe
3.4 (cont'd)	Develop an exit interview process	Conduct exit interviews with exiting biographers, to determine significant themes requiring improvement.	[Done]
	Put in place an ongoing process to identify inactive biographers.	Agreed report Quarterly to Board by Information Officer	Quarterly
3.5 <i>Seek opportunities to produce and use biographies in innovative ways which</i> <i>a) benefit and are agreed with the client, b) progress positive attitudes to our elders by family, carers and general community and c) preserve and communicate social history.</i>	Explore other forms, formats, and uses of biography content within our aged care residence offering, such as one-page biographies for increased understanding and respect of residents by staff and visitors.	Report on types of services provided to/requested by each aged care residence.	Annually
	Find effective ways to obtain client permission for release of relevant information (Also see section 4)		
3.6 <i>Whilst our primary focus will be offering biographical services within aged care residences, we acknowledge that evolving government policy might lead us to consider other venues in the future (such as individual homes or regional assisted retirement homes).</i>	Board to put in place an agreed procedure for piloting of new opportunities, that includes risk and legal approaches. Agree risk assessed pilots for the provision of biographical services beyond aged care residences, such as other senior communities (e.g. assisted retirement villages) and independent living. Make recommendations regarding the feasibility and desirability of expansion,	Thoroughly evaluate pilot programs, during implementation and on completion.	Per program

<p><i>Any future development will be planned, resourced and include an agreed procedure for piloting and evaluating of new opportunities, that includes risk and legal approaches</i></p>	<p>based on pilot results.</p> <p>In 2024 we will proceed with current agreed pilots (subject to financial, resource and legal considerations) but not seek any others.</p> <p>We will not seek to expand into independent living or assisted retirement villages in 2024-2027 other than where desirable as part of a planned regional program.</p>
---	--

Relationships

4. Build and strengthen external relationships and partnerships to improve our program and expand opportunities for other agencies to participate in biography programs.

Goal	Method	Targets and Measures	By when /Timeframe
<p><i>4.1. Build strategic, collaborative, and effective relationships with aged care providers, individual aged care residences and their lifestyle teams.</i></p>	<ul style="list-style-type: none"> Be strategic in our development of relationships with aged care providers, specifically through the roles of the BW executive officer and assessors. 	<p>Report and evaluate aged care relationships, measured by quantity and quality of partnerships.</p> <p>Maintain regular reporting of geographic activities and volunteer availability.</p>	<p>Annually</p> <p>Quarterly</p>
	<ul style="list-style-type: none"> Build relationships with aged care organisations at the overall provider, residence manager and Lifestyle Coordinator level. 	<p>Identify gaps in coverage and put in place activities to minimise these (see 3.2).</p>	<p>Quarterly</p>
	<ul style="list-style-type: none"> Where possible match individual volunteer biographers with local aged care residences to build longer term relationships 	<p>Appropriate placement of 80% of available biographers within 2 months (and/or reporting of extenuating circumstances).</p>	<p>Quarterly</p>
	<ul style="list-style-type: none"> Further explore suitable and meaningful sponsorship/partnership by existing and future aged care providers. 		

Goal	Method	Targets and Measures	By when /Timeframe
4.2. Support and work with others in the “biography business” to share knowledge and create more opportunities for people to tell and record their stories	We will provide training and other support that aligns with our purpose and policy subject to there being no net cost to our own service provision. Explore a suitable pricing structure for the provision of training to external organisations.	Evaluation of partnerships and sponsorships. (Quantity and quality of partnerships and their goals). Board to develop clearer policy on partners and sponsors.	Annually or per specific program Within six months
	Document, evaluate and learn from our sponsorship and partnership relations (especially Calvary) over the next two years	Plan an annual program of sustainable external training provision for suitable partners (e.g. limit of two external training events per year).	Annual plan
4.3 Beyond Words will be better known and understood by potential stakeholders.	Fundraising subcommittee to further develop and implement a branding, marketing, and media strategy.	<ul style="list-style-type: none"> • Ongoing measurement by website and social media impact • Identify suitable ways to measure brand awareness. 	Quarterly Within 6 months