



**Webinar**

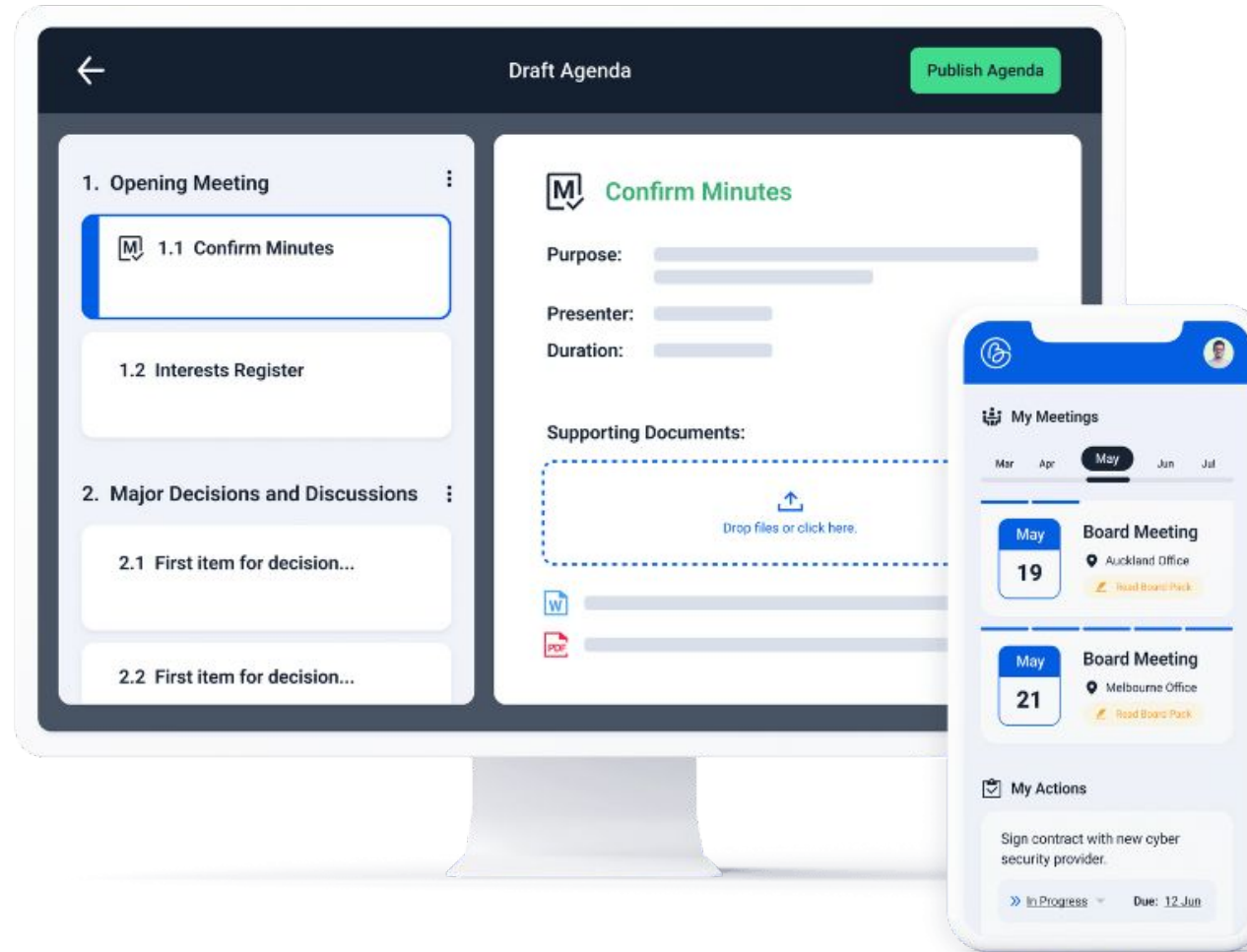
Not for profit boards

# Strategic versus Operational

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**Making the fundamentals of  
governance free and  
easy to implement**



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# Not-for-Profit Boards Strategic vs Operational

Presented by Anna Fitzgibbon

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[www.thebreakthroughoffice.com.au](http://www.thebreakthroughoffice.com.au)

I acknowledge and pay respect to the Traditional Owners, to their Elders past and present, and to their Cultures throughout Australia and New Zealand. I recognise the First Nations Peoples' custodianship over deep time, and connection to lands, waters, and communities.



Who We Are

# The Breakthrough Office

Breakthrough Solutions for Not-for-Profits

Outsourced accounting, governance, human resources, and payroll solutions – under one roof.

About Me

## Anna Fitzgibbon

Executive | Governance & Compliance

Working to release clients from onerous and time-consuming in-house functions, to enable them to achieve strategic goals and make informed decisions.

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# Content

Strategic Planning

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Strategic vs Operational

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Strategic Roles

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Operational Roles

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Applications

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Conclusion



# Why is Strategic Planning Important?

Adaptation to changing economic and social conditions.

Continuous evolution and realignment of goals and strategies.

Regular review of plans, goals, and mission.

Ensures fulfillment of the organization's charitable purpose.

## Strategic Roles

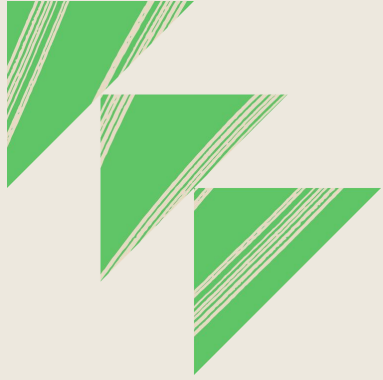
Provide oversight and direction, set long-term goals, and align with core values.

The 'Visionaries'

## Operational Roles

Manage day-to-day activities, executed by the executive team and staff.

The 'Doers'



# Key Elements of Strategic Roles

## **Mission and Vision**

It's our duty to define and regularly review our mission and vision statements. These statements are not just words; they guide our purpose and aspirations, ensuring that all our activities are aligned with our fundamental goals.

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## **Long-Term Planning**

Strategic planning means setting long-term objectives and determining the resources and actions required to achieve them. We need to be forward-thinking, assessing potential risks, and identifying opportunities for growth and development.

## **Policy Development**

We must establish policies that provide a framework for our organisation's operations. These policies ensure consistency, transparency, and accountability across all levels.

## **Oversight and Accountability**

Ensuring adherence to legal and ethical standards is non-negotiable. This includes financial oversight, compliance with regulations, and monitoring the performance of our executive team.



# Ensuring Strategic Functions are Value-Add



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# Key Elements of Operational Roles



## **Program**

### **Implementation**

This involves executing the programs and services that fulfil our mission, managing resources, staff, and volunteers to ensure successful delivery.

### **Fundraising and**

### **Financial**

### **Management**

Manage finances, budgeting, and fundraising efforts.

## **Administrative Tasks**

These are the necessary functions that keep our organisation running, such as human resources, IT, and facilities management.

## **Performance**

### **Management**

Supervising and evaluating staff performance to ensure that operational goals are met. This includes providing training, support, and resources for staff development.

## **Operational**

### **Decision-Making**

Making decisions related to the day-to-day activities and operations. This requires a hands-on approach and immediate problem-solving skills.



# Monitoring and Evaluating Operational Functions

Establish clear, measurable goals and KPIs.

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Regular, structured reporting from operational teams.

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Periodic reviews and audits.

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Use of dashboards and data analytics.

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Encourage continuous improvement and clear delegation.

## Strategic vs Operational Roles

# Applications



### Clear Role Definitions

Prevent role confusion and ensure everyone understands their scope.



### Effective Delegation

Delegate operational tasks and support the executive team.



### Regular Reviews

Ensure alignment between strategic plans and operational performance.



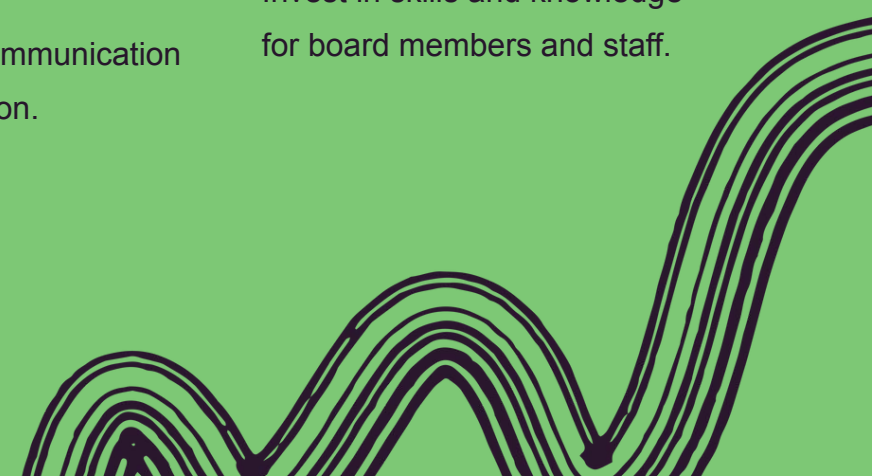
### Communication and Collaboration

Foster open communication and collaboration.



### Training and Development

Invest in skills and knowledge for board members and staff.





The Breakthrough Office Launch

# Corporate Secretarial



Outsourced Corporate Secretarial support, exclusively for Not-for-Profit organisations.



Creation and ongoing development of governance and compliance documents including: policies; procedures; registers; and other documents relevant to the life cycle of the Board.



Drafting and lodging key regulatory reporting deliverables, including ASIC and ACNC lodgements.



Preparing Agendas, Board Packs, and Minutes through the BoardPro Software.

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# Conclusion

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For more information read our blog on the strategic role of boards:

<https://www.thebreakthroughoffice.com.au/insights/strategic-vs-operational-understanding-the-role-of-boards/>





# Thank you



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