

Topic 3

EMERGE
Supporting Farmer Led Groups

A collaborative project between
TAS FARM INNOVATION HUB
RMCG

Planning - Purpose, Values & Goal Setting

Starting a new group is an opportunity to build strong foundations from the beginning. Taking time to clarify your group's purpose, shared values, and goals, can help everyone understand why the group exists, what it hopes to achieve and how members will work together.

This information provides some simple planning tools and questions to help you develop a shared purpose, set realistic goals, and turn your ideas into action.

For a new group, planning does not need to be lengthy or complicated. It can simply answer: Why do we exist? What matters to us? What do we want to achieve? What will we focus on to get there?

The following table helps you understand where you are as a group (its 'life stage') and what you might like to focus on. These stages can be as short or long as you need them to be and the timeframes (years) are examples.

Table 1 - What to focus on as your group matures

Life stage of your Group	Forming a group Year 0	Start up (e.g. years 0 - 1)	Beyond start up (e.g. years 2 - 3)	Mature and working (e.g. years 3 - 5)
Description	You're thinking about forming a group	Your group has just formed	Your group has started to achieve things according to your plan	Effectively working, looking for continuous engagement
What to focus on	Purpose – why you want to do this? Values – what is important to you?	Goals Objectives Tasks	Your strategy KPIs (what good looks like)	Reviewing your plan to ensure it is still fit for purpose
Things to think about	(see questions in 'What to focus on')	How well do your goals, objectives, and tasks help you form a plan? What does good look like?	You want to measure how well you are going – are you achieving your goals and objectives?	Do the purpose and values still hold? Is there a clear strategy that is aligned with your group's purpose and values? Have you achieved your goals? What needs to change?

Some groups feel the need to develop a strategic plan. For some groups, they just want to have a plan. The main difference is scope, timeframe and purpose.

- A plan sets out what you intend to do and how you will do it. It is usually practical and task focused, identifying activities, responsibilities, resources and timeframes. A plan might cover a particular project, event, program or a relatively short period.
- A strategic plan provides the bigger picture direction for your group. It explains where the group wants to go, why that direction matters, and the priorities that will guide decisions over a longer period. It commonly includes your **purpose**, **values**, **longer term goals** and **key strategic priorities**.

The following process and template can help your group determine its Purpose, Goals, Objectives, Tasks, Key Performance Indicators (KPIs) and develop a plan to help guide what you want to achieve.

Group Name: _____

Strategic Plan

Insert date here: _____

1. Purpose

The first step is to define your group's purpose.

What is your 'why'? Ask yourselves why your organisation exists, where you want to be, and the core principles or values that are guiding your actions.

- **Purpose**: The reason you do what you do – the desire to achieve a specific outcome giving meaning and direction to your actions.
- **Values**: Values help us determine what is meaningful and important to us. They serve as guiding principles that shape our attitudes, behaviours, decisions, and interactions with others. They give us a sense of direction and purpose, guiding our actions toward goals that align with our beliefs and aspirations.

Example Purpose

To build connection with farmers across the region, offering opportunities to learn from one another and to lean on one another.

Example Values

Community, collaborative, trustworthy, fun

See Resources for lists of more values

1. Your Group's Purpose

1. Your Group's Values

2. Goals

What are your top three to five goals? What does your group want to achieve in the next 5 years?

Goals should be set thinking about the outcome or impact you want to achieve in the long term. Setting some parameters around what your goals should be ensures that they are attainable and eliminates guesswork. We use the SMART framework to develop goals.

Specific: in order to make a goal effective it needs to be specific. Consider questions like:

- Who is responsible for it?
- What needs to be achieved?
- What steps need to be taken to achieve it?

Measurable: being able to measure or quantify your goals makes it easier to track your progress and know when you have achieved the goal. Incorporating measurable, trackable benchmarks is important.

Achievable: this is where you need to check if your goals are realistic.

- Can you and your team actually accomplish this goal? It is important to acknowledge constraints and what may be beyond your sphere of influence.
- Do you have the resources (time, skills, money)? You can shift the timeframe if you think it will make your goal achievable.
- *Responsibility* - Do you need a working group, or will there be a formal Group Committee to help you achieve this?

Relevant: here is where you think about the big picture and ask yourself: why am I setting this goal? Is it relevant to me and my group?

Time-bound: this is where you and your group need to identify your time horizon. When will the group start implementing the actions you have set to achieve your goal and reduce risks? When is expected completion? You all need to be on the same page so that you can stay on track.

2. Your Group's Goals

Example Goal

By 2030 we have increased opportunities for connection between farmers including introducing newcomers.

3. Objectives

What are your key objectives in the short-term? What do you want to achieve in the next year?

By making your objectives specific, your tasks or activities will be easier to develop.

Example Objectives

Run a quarterly social event involving a chat about the season over a bbq.

Reach out to new farmers/staff/families so they feel welcome, share contact details if willing.

3. Your Group's Objectives

4. Tasks (Action Plan)

What are the key things (tasks or activities) you will need to carry out to achieve your goals and objectives? These are your priorities.

When developing an action plan, it is important to also consider timelines, who is responsible, costs and other resources required (this includes knowledge).

Example Tasks

Create a list of willing hosts.

Collate a contact list, determine where is best to save.

Determine if a Facebook or Whatsapp group would be useful.

Meet 6 weeks ahead of each event to confirm plans, assign tasks, follow up discussion.

4. Your Group's Tasks (Action Plan)

What	Who (individual, working group, or Group's committee)	By when

5. Key Performance Indicators (KPIs)

How will you measure your success? How will you be able to tell that what you are doing is having impact or helping to reach your goals and objectives?

Draw on your SMART goals and objectives to develop your KPIs. Consider how you will track progress (e.g. traffic light reporting) and share information within your group.

Example KPIs (and results)

- Number of social events in a year
  (we ran 4 social events in 2026)
- Feedback from farmers attending events
  (feedback from farmers indicates that they found events useful)
- Regular meetings
  (dates)
- Minutes of meetings – including attendees
  (minutes reflect discussion on e.g. options for contact register and online presence)
- Number of newcomers
  (numbers of newcomers that were welcomed and followed up)
- Social media likes and follows
  (show increases).

5. Your Group's KPIs

Example 2026 - 2030 Plan		
Purpose		
Values		
Key Goals	**Responsibility**	**By when**
Key Tasks	**Responsibility**	**By when**

Key Performance Indicators Year 1	Key Performance Indicators Year 2	Key Performance Indicators Year 3

Additional Resources

- **List of values**

  https://brenebrown.com/resources/dare-to-lead-list-of-values/

  https://heytaco.com/blog/100-inspiring-core-values-examples-for-founders-and-ceos

How this resource came about

The Emerge project was funded by the Australian Government's Future Drought Fund to support new, emerging and informal farmer groups to develop their skills and knowledge, and to create this set of resources for use by groups into the future. Groups participating in 2026 received coaching and additional learning opportunities to supplement the content of these resources.

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