



# Business Planning & Setting Goals for 2026

Aligned with RACGP Standards for General Practices (6th Edition)



HOSTED BY  
**Riwka Hagen**  
Medical Business Services

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12:30pm AEDT

BUSINESS PLANNING  
MARKETING  
FINANCE  
TEAMWORK  
ROADMAP  
STRATEGY  
RISKS  
GOALS  
VISION



In the spirit of reconciliation, HotDoc & Medical Business Services acknowledges the Traditional Custodians of country throughout Australia and their connections to land, sea and community.

We pay our respect to their Elders past and present and extend that respect to all Aboriginal and Torres Strait Islander peoples today.



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-  This session is being recorded & will be sent to you 4-6 hours after this session has concluded along with the resources.
-  Use the Q&A tool on your screen to submit a question through the session & we will address at the end.
-  In the “related content” you’ll find our further feedback form.
-  Your certificate of attendance will be accessible at the 40 min mark, you can access via the  certificate icon on your console.
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-  Please take some time to complete our feedback survey to let us know what you thought of today’s session.



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# Business Planning & Setting Goals for 2026

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# Session Overview

**RACGP 6th Edition – Foundations of General Practice (F1)**

**Strategic vs Operational Planning – What's Required**

**NEW: Mission, Values & Safety Culture Requirements**

**How Do I Start? Reporting & Review Requirements**

# 6th Edition – Foundations of General Practice (F1)

*"I expect that this practice has defined mission and values and monitors its progress towards achieving them supported by appropriate and current policies and procedures."*

— Consumer Expectation

## KEY CHANGES FROM 5TH EDITION:

**Mission & Values** – Explicitly required (F1.A)

**Strategic Plan** – Documented with goals, reviewed every 2 years (F1.B)

**Operational Plan** – Separate documented plan with objectives (F1.C)

**Safety Culture** – Strategic approach + assessment required (F1.D)

**Document Control** – Version control, 2-year review cycle (F1.E)



# F1 Required Criteria

## F1.A – Mission & Values

Define, document, assign responsibility, communicate to team & consumers

## F1.B – Strategic Plan

Documented plan with goals, review every 2 years, measure progress

## F1.C – Operational Plan

Documented plan with objectives, assign responsibility, measure progress

## F1.D – Safety Approach

Strategic approach to safety, assess safety culture using team feedback

## F1.E – Policies & Procedures

Current, accurate docs, 2-year review, version control, assign sign-off

## F1.F – Ethical Issues

Process for team to consider, reflect on and respond to ethical issues

# What is Business Planning?



**Achieving Goals  
& Objectives**



**Measure  
Progress**



**Proactive  
Planning**



**Quality Care  
Environment**

6th Edition requires **BOTH** a Strategic Plan AND Operational Plan

# Planning Hierarchy

## STRATEGIC PLAN (F1.B)

**Mission** – Why we exist

**Vision** – What we want to be

**Values** – What we believe in

**Strategic Goals** – What we must achieve

*Reviewed every 2 years*

## OPERATIONAL PLAN (F1.C)

**Objectives** – Specific outcomes

**Action Plan** – What/Who/When/How

**KPIs** – Success indicators

**Safety Culture** – Assessment (F1.D)

*Measure progress regularly*



# Strategic vs Operational Planning

## Strategic Plan (F1.B)

- ✓ High-level direction (2-3 years)
- ✓ Service development plans
- ✓ Financial goals & forecasts
- ✓ Outcome goals for quality care
- ✓ Primary responsibility assigned

**Reviewed every 2 years**

## Operational Plan (F1.C)

- ✓ Day-to-day activities
- ✓ Specific objectives & milestones
- ✓ Who, what, when, how
- ✓ Links strategy to daily workflows
- ✓ Shows how mission/values addressed

**Measure progress regularly**



# Mission, Vision & Values

## Mandatory (6<sup>th</sup> Edition)

Define, document and communicate your practice's mission and values. Assign responsibility. Monitor reflection in operations.

Example Values:

- ✓ Continuous quality improvement
- ✓ Patient empowerment & cultural competence
- ✓ Empathy, compassion & ethical practice
- ✓ Team collaboration & safety first

## How to Communicate

**To Team:** Meetings, emails, training, performance evaluations

**To Consumers:** Waiting area display, website, patient info

*"I expect that this practice has defined mission and values..."*  
— Consumer Expectation



# Safety Culture Assessment

## Strategic Approach to Safety

- ✓ Embed safety into strategic planning
- ✓ Assign clear safety leadership
- ✓ Set safety-related goals
- ✓ Identify safety performance indicators

## How to Assess

- ✓ Observe daily safety implementation
- ✓ Survey or focus group team members
- ✓ Review incident reports & near-misses

## Assess Team Confidence In:

### General Safety Processes

Infection control, privacy, IT security

### Risk Management Systems

Identifying and managing risks

### Incident Management

Reporting and responding to incidents



# SWOT Analysis

Use to inform your Strategic Plan goals (F1.B)

## S – Strengths

- ✓ Experienced clinical team
- ✓ Strong patient relationships
- ✓ Good location/technology

## W – Weaknesses

- ✓ Limited availability
- ✓ Staff training gaps
- ✓ Outdated policies

## O – Opportunities

- ✓ Telehealth expansion
- ✓ New MBS items
- ✓ Growing population

## T – Threats

- ✓ Workforce shortages
- ✓ Rising costs
- ✓ Policy changes

# PEST Analysis

Informs Strategic Plan environmental scan (F1.B)



## P – Political

- ✓ MBS changes & rebate reforms
- ✓ Primary care policy shifts
- ✓ Scope of practice changes

## S – Socio-cultural

- ✓ Demographic changes
- ✓ Patient expectations rising
- ✓ Chronic disease prevalence

## E – Economic

- ✓ Funding models & incentives
- ✓ Workforce costs
- ✓ Patient out-of-pocket trends

## T – Technological

- ✓ AI & clinical decision support
- ✓ Telehealth advancements
- ✓ Cybersecurity requirements

# SMART Goals

Link to Operational Plan objectives (F1.C) – must be documented and measured

**S**

**Specific**

What exactly will you accomplish?

**M**

**Measurable**

How will you know it's done?

**A**

**Achievable**

Is it realistic?

**R**

**Relevant**

Does it align with strategy?

**T**

**Time-bound**

When will it be completed?

**6th Edition:** Goals must be documented in your plans and progress measured regularly



# SMART Goal Example

**Goal:** Increase childhood immunisation rates from 85% to 95% within 12 months by implementing a recall system and conducting monthly reviews.

**Specific**

Childhood immunisation rates

**Measurable**

85% → 95%

**Achievable**

10% with recall system

**Relevant**

PIP QI & preventive care

**Time-bound**

12 months

**Actions:** Implement recall system → Assign responsibility → Monthly reviews → Track progress → Report outcomes



# Where to from here?

## Getting started with 6th Edition requirements

Take back to your team – involve whole practice

Assign responsibilities for F1.A–F1.E areas

Start with Mission & Values discussion

Conduct SWOT analysis collaboratively

Draft Strategic Plan with 2-year goals

Develop Operational Plan with objectives

Set up document version control system

Schedule review dates (every 2 years min)



# One Page Plan Structure

6th Edition requires BOTH documented plans



## Strategic Plan (F1.B)

- ✓ Mission, Vision, Values statement
- ✓ Strategic goals (2-3 year horizon)
- ✓ Key initiatives and outcomes
- ✓ Success measures
- ✓ Assigned responsibilities
- ✓ Review date (every 2 years)

## Operational Plan (F1.C)

- ✓ Specific objectives
- ✓ Actions – What/Who/When/How
- ✓ Progress tracking metrics
- ✓ Links to strategic goals
- ✓ Assigned responsibilities
- ✓ Regular progress measurement

**Tip:** Can be separate documents or combined – just ensure both components are present

# Business Plan Template

Include version control elements (F1.E)

Date	Area	Goal/Objective	Priority	Due	Who	Activities	Status
01/02/26	Clinical	Increase immunisation rates to 95%	High	Dec 27	Dr Smith	Implement recall system	In Progress
01/02/26	Safety	Complete safety culture assessment	High	Mar 27	PM	Staff survey & observations	Not Started
01/02/26	Governance	Review all policies & procedures	Med	Jun 27	PM	Audit, update, version control	In Progress



# Reporting on Your Plan

6th Edition review and documentation requirements



## Required by 6th Edition

- ✓ Strategic plan review every 2 years
- ✓ Operational plan progress measurement
- ✓ Document version control
- ✓ Evidence for accreditation

## Accreditation Evidence

- ✓ Documented Strategic Plan with review dates
- ✓ Documented Operational Plan with progress
- ✓ Meeting minutes showing plan discussions
- ✓ Version-controlled policies (F1.E)
- ✓ Safety culture assessment records (F1.D)

## Reporting Examples

- ✓ Quarterly progress meetings
- ✓ Track key performance indicators
- ✓ Benchmark against goals

## Be Responsive

- ✓ Update plans as circumstances change
- ✓ Document changes with version control

# Key Messages

## 6th Edition Requirements

- ✓ Strategic AND Operational plans required
- ✓ Mission, Vision, Values mandatory (F1.A)
- ✓ Safety culture assessment & version control

## Action Required

- ✓ Assign primary responsibility for each area
- ✓ Document and measure progress
- ✓ Start planning now – don't wait!

## Best Practice Approach

- ✓ Big picture thinking + systems approach
- ✓ Involve the whole team
- ✓ Regular reporting and SMART goals

## Remember

- ✓ Planning creates quality care environment
- ✓ Plans are living documents – update as needed
- ✓ Good planning supports team wellbeing

# 6th Edition – Related Standards

## Other standards that link to business planning



### F2 – Response Planning

- ✓ Tested response plan for disruptions
- ✓ ICT continuity processes
- ✓ Emergency preparedness



### CQI1 – Continuous Quality Improvement

- ✓ Separate standard for QI activities
- ✓ Links to PIP QI requirements
- ✓ Complements business planning

### F3 – Environmental Sustainability

- ✓ Document strategies to minimise impact
- ✓ Assign responsibility for sustainability
- ✓ Consider in strategic planning



### CG – Clinical Governance

- ✓ Clinical leadership and oversight
- ✓ Quality and safety systems
- ✓ Supports safe care delivery goals



# Resources



## RACGP Standards

- ✓ (Draft) Standards for General Practices  
6th Edition
- ✓ General Practice Business Toolkit
- ✓ Managing Emergencies Guide (F2)
- ✓ Environmental Sustainability Guide (F3)

## Practice Management

- ✓ Link to Practice Management & Risk Register

**Medical Business Services**  
[www.medicalbusinessservices.com.au](http://www.medicalbusinessservices.com.au)



<https://www.medicalbusiness.services/business-planning-request>

## Business Planning Tools

- ✓ Business.gov.au – Planning templates
- ✓ SWOT & PEST Analysis templates
- ✓ Business Plan / Action Plan templates



# Marketing in Medical Practices: What You Can Say and Send



HOSTED BY  
**Ella Cannon** Partner



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# Have a Question?



# Thank You!

