



Business Planning & Setting Goals for 2026

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



HOSTED BY
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Medical Business Services

**BUSINESS
PLANNING**

MARKETING

FINANCE

TEAMWORK

ROADMAP

STRATEGY

RISKS

GOALS

VISION

**Tue 3rd February, 2026
12:30pm AEDT**

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.



Medical Business Services



Housekeeping

-  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 questions 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.
-  Have a play around with the console/ icons on your screen for an interactive experience.
-  Please take some time to complete our feedback survey to let us know what you thought of today’s session.

Business Planning & Setting Goals for 2026

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

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 (6th 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

Reporting Examples

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

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)

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)

Business Planning Tools

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

Practice Management

- ✓ Link to Practice Management & Risk Register

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www.medicalbusinessservices.com.au



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

Marketing in Medical Practices: What You Can Say and Send



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Have a Question?



Thank You!

