



A CLUB'S GUIDE TO

STRATEGY & PLANNING

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WHAT IS 'PLANNING' AND WHY IS IT IMPORTANT?

A plan can be simply defined as a set of actions to achieve a club's defined goals and objectives. It helps a club understand where it is now and where it wants to be in the future.

Without adequate planning, immediate issues tend to take up all available time and clubs fail to anticipate any changes. It is vital that a club is proactive rather than reactive in achieving its goals and objectives.

WHAT A PLAN IS NOT.

A plan is not a 'wish-list'! The goals and objectives need to be SMART goals and agreed on by the committee after much consultation with relevant club people.

A plan is also not a document that then gets put away until next year. It should be regularly reviewed to ensure the club is on track to achieving its goals and travelling in the right direction.

WHAT IS THE COMMITTEE'S ROLE IN PLANNING?

The committee is responsible for ensuring the club has a clear direction regardless of changes in committee personnel.

The committee is also responsible for ensuring the strategic plan is referred to regularly and is used during decision making processes.



STRATEGIC PLANNING

ESTABLISHING A STRATEGIC PLAN FOR YOUR CLUB

Creating a strategic plan for your club may seem daunting but it will eliminate as much uncertainty about the future as possible and allow the club to move forward in the most efficient manner.

A strategic plan is considered a long-term plan (12months - 5 years' time). When creating the strategic plan, a club needs to consider the reasons for establishing the club, the nature of the community it will serve now and into the future, and how it will do so.

The planning process should involve four to five key people in the club and is led by the club president.

STAGE ONE - SNAPSHOT OF THE CLUB

The club needs to have a clear understanding of where they have come from and where they are now before any forward planning can be completed. A snapshot of the club allows the club to identify its current position.

The following information should be considered:

- Financial Data and position
- Membership demographics
- Training participation
- Grading progression
- Tournament results
- Off-mat social engagement

A helpful tool during this stage is completing a SWOT analysis. It will allow you to identify the club's strengths, weaknesses, opportunities, and threats.

It is important to remember strengths and weaknesses relate to the internal aspects of the club such as facilities, members, coaches, and equipment while opportunities and threats are those external aspects relating to the club, such as funding opportunities or issues relating to changes in rules and regulations.

STAGE TWO - DEVELOP VISION, MISSION AND VALUE STATEMENTS

Vision statements states what the club wants to achieve. A vision statement looks to the future and needs to be clear, concise, inspiring, and challenging. You want to be able to achieve your vision within 5-10 years.

Mission statements are a brief description of an organisation's fundamental purpose. It states a club's reason for being. The mission statement should identify the main reason for the club existing and acts as a catalyst for change and development within the club.

Club values are the core beliefs that shape the way the club behaves and make decisions. They provide a framework for how members treat one another and how they treat others such as potential members and other clubs. A club should establish between four and six key values that will form the base to develop a genuine understanding of what is important to the club.

While it is important to set these for your club, it is more important to live by the statements and values. Ensure your club stakeholders are aware of the statements and values and how they will be used to empower the club or used when dealing with a difficult decision and situations.



STAGE THREE - SET GOALS, OBJECTIVES AND KEY PERFORMANCE INDICATORS

Goals, objectives and KPIs are an important part of any successful clubs and help determine how members represent their club and what activities they want to plan.

Goals are what the club wants to accomplish. **Objectives** are the activities to achieve the goals and **KPIs** are how objectives are measured. When determining goals, objectives and KPIs, consideration needs to be given to responsibilities, timelines, and financial resources available. Applying the SMART process when planning will help you to create more specific, achievable targets for your club, and to measure your progress toward them.

S – Specific - well-defined and focused goals have greater chance of being accomplished. Consider the who, what, when, where and why.

M - Measurable - goals must have criteria for measuring progress. Think about the how - how much money/time? How will I know the goal is completed? How will I measure success?

A – Achievable - A SMART goal must be achievable and attainable. Do not be unrealistic!

R – Relevant - goals needs to be relevant to your club mission, values, and strategic plan. Ask "why is it important to reach this goal?".

T – Time- based - a goal needs to have a start and finish date. This will help prioritise goals and keep the club motivated to achieve each goal.



STAGE FOUR - WRITE THE PLAN

The club's plan can be used for membership growth, funding applications, sponsorship proposals, succession planning and various other purposes. When writing a club's strategic plan, consider the following points:

- It should be clear and well set out
- An executive summary should be included as an introduction
- Timelines, responsibilities and financial factors should be clearly identified
- The review process should be outlined indicating the ongoing monitoring of the plan

Once the plan has been drafted, it should be circulated to other members of the committee to ensure it reflects the club's needs.

STAGE FIVE- IMPLEMENT, MONITOR AND REVIEW THE PLAN

A strategic plan is a living document and needs to be continually referred to and evaluated at specific times throughout the year. A strategic plan is not a "set and forget" document!

The plan should be tabled at each club meeting with each committee member providing a progress update on relevant areas.

Each portfolio area within the club should conduct an end-of-season review, by discussing the strengths and weaknesses of the plan and the outcomes from the season. A report should also be compiled at the end of the season and be presented at the AGM regarding the implementation of the plan.



FINANCIAL PLANNING

All clubs should have sound financial planning - no matter their size! A **budget** shows the club's planned revenue and spending and allows the club to allocate funds appropriately.

A budget will show:

- How much income your club expects to receive during the next financial year (income)
- How much your club expects to spend in the next financial year (expense)
- The predicted surplus (profit) or deficit (loss) for the budget period

PREPARING A BUDGET

The treasure should lead the process of preparing the budget with input from all areas of the club. The best place to start is by reviewing previous years' income and expenditure and consider any changes that will occur during the new financial year. The treasurer will need to consider:

Fixed costs - these are fixed expenses like rent, insurances, and any other fees.

Variable costs - these are expenses that may change like utility bills. If you are unsure, estimate the highest possible amount to give the club room for error.

Income - this is the money your club will receive like registration fees, grants, and sponsorship money. Be conservative when predicting your income for more flexibility.

BUDGET ANALYSIS

Analysing and monitoring your budget will help you make smart decisions.

Look at your income vs expense regularly. If you are spending too much, look at ways to reduce your costs. If you have extra funds, think about how you may invest it back into the club to ensure future success or create a safety net for your club.

A budget report should be provided at each committee meeting.

MARKETING PLAN

A marketing plan helps promote products and services in your club that meet the needs of your target market. The marketing plan will link to the club's strategic plan.

A marketing plan identifies:

- The aim and objectives of the plan
- Details of how the club is described and perceived by its stakeholders
- Members and their needs
- Point of difference – what sets your club apart from others Club's strengths and weaknesses
- How the club will promote itself, activities, or events? E.g., Regular local media coverage, paid advertising, activities with schools or other private/corporate sectors, word-of-mouth, brochures, etc.
- Cost and timelines for the implementation of actions.

A good marketing plan will ensure the club can market and position itself correctly within the community and continue to grow.

COMMUNICATIONS PLAN

A communication plan describes how you will communicate with various groups and stakeholders. It ensures the club has effective and relevant communications with its stakeholders.

A communication plan identifies:

- Who you are communicating to
- What you want to tell them
- How you are going to tell them
- Who is going to tell them
- When they are going to be told

SUCCESSION PLANNING

SUCCESSION PLANNING FOR YOUR CLUB

Succession planning is a strategy for identifying and developing future leaders at your club. It sets a clear plan for volunteer progression and replacement, so the club isn't left stranded when a volunteer leaves.

Succession planning also ensures effective information sharing and record keeping avoiding the loss of critical information and improves volunteer recruitment and retention as volunteers know what they are committing to and how to do their role.

While the club committee is responsible for establishing and evaluating the formal succession plan, all volunteers are responsible for ensuring the next volunteer can step into the role as smoothly as possible.

The key to ensuring successful succession planning and smooth transition of volunteers is record keeping and information sharing. Important documents and information for successful succession planning include:

- Club Strategic Plan
- Various club plans e.g. communication plan, recruitment plans
- Position Descriptions
- Various club databases e.g. volunteer database, sponsorship database, key contact database etc
- Work instructions, volunteer manuals and handover notes
- Policies and procedures



STAGE ONE - EXAMINE THE CLUB'S POSITION

To start the succession planning process, you first need to get an understanding of where your club is now and where it wants to go in the future. This information can be found in the club's strategic plan.

Identify the vital roles that play a part in the current and future success of the club. Start by making a list of the roles required.

When making the list, ask yourself:

- What roles are important to the success of the club now? What roles are needed in the future?
- What roles are needed now but do not have? What roles can the club survive without?

STAGE TWO - CREATE POSITION DESCRIPTIONS AND WORK INSTRUCTIONS

Next, identify what the roles are for and what is needed to be successful in the role. Work with people currently in the roles and the club committee to answer the following questions:

- What is the objective of the role?
- What skills are needed to do this role successfully? What and how will this job be done?
- What training and education is available for this role?

Use this information to create job descriptions and work instructions to ensure the right people are found for each role.

STAGE THREE - IDENTIFY POTENTIAL SUCCESSORS

You need to identify who you would be suitable to take over key roles in your club. This ensures the club is not left without key roles filled and allows time for "on the job training" and any other additional training needs.

Consider your current volunteer cohort and identify potential successors. A club may need to look externally for a new successor.

STAGE FOUR - DEVELOP AND PREPARE SUCCESSORS

To ensure the successor is prepared and ready to step into the role, it is a good idea to create a training and development plan outlining the training, coaching, mentoring or work experience activities that they will engage in over a certain time. This can be listing the opportunities in the Succession Planning Spreadsheet.

STAGE FIVE - EVALUATE YOUR SUCCESSION PLAN

Like all plans, the succession plan should be reviewed and evaluated regularly to ensure its effective, all relevant documents are current and to identify future vacancies.

To effectively review the plan, the committee will need to set measurable indicators. These could include:

- Volunteer turnover and reasons for departure
- Volunteer feedback
- Retention of successors and current volunteers
- The nature of the transition to the new volunteers i.e., was it smooth or complicated?

By monitoring performance and being aware of changes happening within the club, the succession plan will be more effective, relevant, and much more valuable.

