**Process**

**Developing your Club’s Strategic Plan**

**Introduction**

A Strategic Plan is a vital document to ensure the Club is working together to achieve a common purpose. Another way to look at this would be the development of a *game plan* for the Club.

Some Club’s opt to pay a Consultant to drive the process of creating a Plan. This document seeks to provide a simple and easy -to-follow guide for Clubs to develop (or update) a Strategic Plan who wish to drive this process themselves. Should Club’s wish to clarify the process or would like guidance or assistance (free of charge) please contact clubsupport@footballvictoria.com.au.

There are many ways to develop a Strategic Plan, this document provides just one way as to how this could take place.

**Why should the Club have a Strategic Plan?**

* Provides a clear ‘game plan’ outlining the goals and tasks the Club would like to achieve.
* Provides clarity on who is responsible for each task, and when it is due.
* *Failing to plan is planning to fail.*

**Step 1 – Starting the Process**

1. **Duration of the Plan**

Identify how long the Club Committee would like the Strategic Plan to be in place – for example, 2, 3 or 5 years. Some factors to consider in the duration of the Plan are:

* Is there a particular project that has a certain timespan that you want to align your focus to (i.e. a Facility improvement)?
* Are there external factors that are influencing the focus of the Plan (i.e. The impact of COVID-19 requiring a short-term focus, and therefore a 2-year Plan)
1. **Appoint key roles**

*Strategic Plan Meeting Group*

Usually Committee Members are the main group of people who would be involved in the four meetings to shape the Strategic Plan. At this stage the Committee is encouraged to consider who else should join these meetings. Additional personnel to consider may be:

* Technical Director
* Player representative(s) (of various age groups)
* Parent representative(s)
* Those with appointed positions, who may not sit on the Committee (i.e. Sponsorship Coordinator)
* Ask your Members if they wish to join the group
* Local community members with specific skills who may be able to add value

There will be additional opportunities for your members to have input into the Plan during steps 4 and 8.

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| **Note:** It is highly recommended that the meetings outlined in this process are separate to regular Committee Meetings. This enables the Strategic Plan Meeting Group to focus on the long-term Plan as opposed to the agenda of the day. |

*Project Leader*

Appointing a member of the Strategic Plan Meeting Group who has expertise or interest in planning, collaboration and engagement is a critical decision in this project. When appointing a person to drive the Strategic Plan, consider the following skills:

* Highly organised and has project management experience
* Excellent communicator – listens to all opinions
* Excellent facilitator skills
* Well respected within the Club or community

*Small Group Facilitators - Key Focus Areas*

A great way to engage a wider group of Members is to have different facilitators for each Key Focus Area of the Plan.

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| **What is a Key Focus Area?**The areas that the Club believes are the most important items to be delivered. For example, Football Victoria’s Key Focus Areas are:1. Our Clubs
2. Facilities and infrastructure
3. Enjoying our game
4. Promoting our game
5. Our people
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The Strategic Plan Meeting Group can wait to appoint these facilitators until after the Key Focus Areas are determined. That way, it is more likely to generate enthusiasm based on potential facilitator’s experience and interest.

1. **Agree on timelines**

Seeking Strategic Plan Meeting Group agreement on timelines can help keep everyone focused and on track. The following table summarises the steps to lead to the completion of your Strategic Plan. Text in italics provides you with some guidance on the time to allow between steps.

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| **Tip:**Please factor in the time of year you are starting this process. Consider, if you are starting the process at the start of the season, perhaps allow a little extra time to cater for the on-field items that will take away the Strategic Plan Meeting Group’s attention. |

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| --- | --- | --- | --- |
| **Action/Meeting**  | **Proposed dates** | **Meeting Duration** | **Venue** |
| Step 2 – Committee Perception Survey | *Ideally provide 3 weeks to complete* | N/A | N/A |
| Step 3 - Meeting 1 | *Ideally 2 weeks after Strategic Plan Meeting Group Perception survey closes* | 60 – 90 minutes |  |
| Step 4 – Stakeholder Input | *Ensure enough time to prepare the methods you want to engage your stakeholders (i.e. meeting, survey, feedback forms, etc.).* |  |  |
| Step 5 - Meeting 2 | *Ensure enough time to collate information gained from step 4.* | 2 – 3 hours (may require 2 meetings) |  |
| Step 6 – Small groups: Goals & measures of success, Key Focus Areas  | *Ensure enough time for each group to meet to discuss the content; and enough time for each group facilitator to update the templates.* | 60 – 90 minutes each |  |
| Step 7 - Meeting 3: Confirming/Updating Key Focus Areas  | *Ensure the Key Focus Areas are circulated to attendees before the meeting so that they can be considered in detail.* | 60 – 90 minutes |  |
| Step 8 – Small groups: Creating the detail, Key Focus Areas | *Ensure enough time for each group to meet to discuss the content; and enough time for each group facilitator to update the templates.* | 60 – 90 minutes each |  |
| Step 9 - Stakeholder input | *Ensure enough time to prepare the methods you want to engage your stakeholders (i.e. meeting, survey, feedback forms, etc.)* |  |  |
| Step 10 – Meeting #4: Approval  | *Ensure that there are only minor amendments needed prior to this meeting.*  | 1 hour |  |
| Step 11 – Rollout and continual review |  |  |  |

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| **Tip:**Consider requesting that the Secretary send electronic meeting requests to all required attendees to ensure that the dates are not double booked. |

1. **Committee Meetings**

A great way to keep track of progress is to list the Strategic Plan as an agenda item for each Committee Meeting.

**Step 2 – Strategic Plan Meeting Group perception survey**

To gain a starting point on the individual views of the Committee Members prior to the first meeting, it is suggested that a *Strategic Plan Meeting Group Perception Survey* is circulated. This process provides you with the same information as a SWOT analysis, but without the barriers that the words ‘weakness’ and ‘threat’ create to those who are not familiar with this process.

The intent is that the responses are de-identified so that honest responses can be provided. The suggested questions are provided in the downloadable document below. It is encouraged that you utiise any existing survey platforms you use at your Club. *Survey Monkey* is a free option that may be able to assist you with the collation of this information. Paper based forms are not encouraged as they can be more easily identifiable.

Download: Committee Perception Survey

The Project Leader would then review the information provided by the Strategic Plan Meeting Group Members to gain a greater understanding of the issues, opportunities and focus areas for the next Strategic Plan.

From the information received, collate a short summary for you to verbally deliver at meeting 1. The focus should be on the future; therefore, this process enables the ability to acknowledge what has taken place previously with an eye on the preparation of this plan. A template for this to be presented at Meeting #1 is provided in Step 3.

**Step 3 – Meeting #1: Setting the scene**

Preparation by the Project Leader for this meeting is vital. Updating the PowerPoint presentation with the information gained from the Strategic Plan Meeting Group Perception survey provides the platform for discussion.

The aims for this meeting are:

1. Key Focus Areas established (If the Club is updating their Strategic Plan, consideration on whether these areas need to change/be amended)
2. Individual Strategic Plan Meeting Group Members views considered via survey & discussion
3. Commencement of Vision outline created
4. Identification of Key Stakeholders & consultation methods
5. Timelines for progress confirmed

It is recommended that 90 minutes is allowed for this meeting.

Download: Meeting 1 PowerPoint Template

An important step in this meeting is to establish who the Club needs to engage with (and when/how) to develop the Strategic Plan. Some potential options to engage with stakeholders are provided below (and in the template PowerPoint) for discussion:

* Online survey (Template provided for the club to distribute and manage).
* Informal discussions with club representatives - with reports back to the Strategic Plan Meeting Group.
* Formal meetings with members – opportunities for club representatives to raise matters in group settings (i.e. AGM, social nights, presentation nights, gala days).

This is not an exhaustive list, there may be other unique groups that may be required to have input.

It is also important to establish the method(s) of consultation. Some options include:

* Online survey (Template provided for the club to distribute and manage – refer to Step 4).
* Informal discussions with club representatives - with reports provided back to the Strategic Plan Meeting Group.
* Formal meetings with members – opportunities for club representatives to raise matters in group settings (i.e. AGM, social nights, presentation nights, gala days).

There is no right or wrong in the steps you choose to engage with your Members and stakeholders. Each Club is different and the way you engage needs to speak to your community.

**Step 4 – Stakeholder input**

Step 4 is based on the actions developed in Meeting #1 (Step 3). This is an important engagement piece to ensure that your Club Community has the opportunity to be involved in the future direction of your Club.

If the Strategic Plan Meeting Group has opted to survey all Members and Stakeholders, a template list of questions is available for download:

Download: Member and Stakeholder Survey

It is encouraged that specific questions where you need the views of the wider community are canvassed at this point.

Consider whether the Club requests nominations for individuals to facilitate or participate as a member of the Key Focus Area groups. This may assist to gain a wider view of each Key Focus Area and demonstrate wider consultation across the Club.

Regardless of the methods used to engage feedback, it is recommended that the overall process that you are completing is summarised and communicated to Members via your website and at Club events (i.e. AGM). A contact point for queries (likely to be the Project Leader) should be provided should members wish to gain further information.

From the suggestions/feedback received, it is suggested that the Project Leader collate a short summary to verbally deliver at Meeting 2. A template for this to be presented is provided in Step 5.

**Step 5 – Meeting #2: Where are we going?**

The focus on this meeting is to consider stakeholder feedback, establish (or update, if already in existence) the Vision, Mission and Values and to confirm facilitators for the Key Focus Areas.

The aims for this meeting are:

1. Overview of feedback received from stakeholders
2. Draft Vision, Mission and Values developed
3. If you have not already, this would be the time to appoint the Small Group Facilitators – Key Focus Areas, as well as the members of each group

Download: Meeting 2 PowerPoint Template

Work through the vision first, then mission and underpinning values. Add slides to the PowerPoint presentation based on the information developed to date. You may wish to have the slides as blank and update as you go during the meeting.

If broad agreement is not gained, it is recommended that another follow up meeting be held to gain consensus before progressing to the detail (i.e. Step 6).

It is recommended that the Club appoint people to actively participate in the development of the Key Focus Areas. The groups should be ideally no more than 5 people to enable a balance of diverse views, opinions and opportunity for each person to contribute. Consider the gender balance in appointments to this group. Please see table below to summarise the group members (FV’s Key Focus Areas have been used as an example):

|  |  |  |
| --- | --- | --- |
| **Key Focus Area**  | **Facilitator** | **Group Members (3 – 5 people)** |
| Our Clubs  |  |  |
| Facilities and Infrastructure |  |  |
| Enjoying Our Game |  |  |
| Promoting Our Game |  |  |
| Our People |  |  |

**Step 6 – Small groups: Goals & measures of success, Key Focus Areas**

The outcome of Step 6 is to develop draft goals and measures of success for each Key Focus Area for review by the Strategic Plan Meeting Group.

Download: Key Focus Area Template

This section is intended for action by the facilitator for each Key Focus Area. For clarity, each Key Focus Area facilitator organises their own meeting, and follows the process below:

1. Organise your first meeting:
	* Contact group members to introduce yourself and share your contact information.
	* Nominate a preferred day/time and venue (i.e. online or in person)

Note: This process may require multiple meetings of the group to achieve a draft which is ready for review at Step 7.

* + Provide background reading to prepare for the discussion (i.e. Survey results, stakeholder feedback)
1. First meeting:
	* Aim of the meeting: To start identifying the goals and measures of success for your Key Focus Area.

The items are as simple as listing each goal, and how success will be measured (extract from Key Focus Area template below, example):

|  |  |
| --- | --- |
| Goal: | Increase social football opportunities in our area for 30 – 45 year olds |
| Measure(s) of success: | 500 participants (aged 30 – 45) in a social football program by 2023. |

* + Discussion on the tabled background materials. Consider:
		- What stands out?
		- Is it similar/different to the Club’s current plan?
		- What do we need to focus on?
	+ Start building the Key Focus Area template:
		- Determining the 2 -5 goals that your group believe need to be a priority.

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| **Tip:** There is no right or wrong on how many goals you need to have for each Key Focus Area. The items to consider are:* Are all of these goals achievable within the timeframe of the Strategic Plan?
* Do you have enough volunteers/staff to action these items?
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* + - Draft some ‘measures of success’. This will enable the Club to track the success of each goal. Consider creating measurements that are taken periodically – not just at the end of the plan. This will help the Club to engage your Clubs, Members and Stakeholders with progress you are making.

Note: It may require another meeting to develop the goals and measures of success to a point where it is able to be presented to the Strategic Plan Meeting Group for consideration.

**Step 7 – Meeting #3: Confirming/Updating Key Focus Areas**

The focus on this meeting is to confirm the goals and measures of success drafted by each Key Focus Area Group.

The aims for this meeting are:

1. Summary – Update on progress to date
2. Focus: Are the detailed actions in the Key Focus Area templates on track?
3. Engagement: Who needs to provide final feedback on the Plan?

The Key Focus Area Template for each group should be tabled with the Strategic Plan Meeting Group ideally one week prior to the meeting to enable time to review and consider the items developed in Step 6.

Download: Meeting 3 PowerPoint Template

The intent is that at the end of this meeting, each Key Focus Area group will reconvene and start developing the detailed actions required to achieve the goals. If there are elements which are requested to be changed, this feedback should be provided to the Key Focus Area Group and Step 6 should be revisited before progressing to Step 8.

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| **Note:** By ensuring that everyone is clear on the goals and measures of success, this will save time on going into the detail of the actions required before understanding what you want to achieve. |

**Step 8 – Small groups: Creating the detail, Key Focus Areas**

Now that the goals and measures of success have been agreed, the desired outcome of Step 8 is to have a first draft of the detailed actions required in each Key Focus Area.

Using the same *Key Focus Area Template*, the focus shifts to filling in the details of the Key Focus Area Template (Extract below, using the example from Step 6):

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Step** | **Action** | **Responsibility** | **Support needed from** | **Budget** | **Date Start** | **Date End** |
| 1 | Identify where the participants will come from (other sports; former players) and survey them to determine the time, and formats they would like to play |  |  |  | January 2022 | March 2022 |
| 2 | Develop the social competition structure (does it utilise FV’s Go Football products? Is it run by the league at multiple venues? How long does the season go?  |  |  |  | January 2022  | March 2022 |
| 3 | Budget: Develop a budget for delivering this competition. Including the cost to participants |  |  |  | March 2022 | March 2022 |
| 4 | Marketing: Develop a marketing strategy to attract 500 participants by 2023. |  |  |  | March 2022 | April 2022 |
| 5 | Game Day: Develop a plan to list who is responsible for each item to prepare for competition |  |  |  | March 2022 | April 2022 |
| 6 | Social competition starts |  |  |  | June 2022 | Ongoing |

The first step would be to focus on developing the Actions (highlighted above in orange) to achieve the desired goal. Each goal will have a set of step by step actions required for each goal to be achieved.

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| **Tip:** Large goals do not seem so daunting when they are mapped out into smaller, more manageable parts.  |

The second step shifts to focus on budget and the timing of completing each Action (highlighted above in blue). The benefits of breaking down actions into this detail are:

* Clarity for those responsible for the task to understand the boundaries they are allowed to spend within.
* Clarity on when tasks are required to be completed. This is particularly important for large goals, where others depend on an earlier action being completed.
* With large projects broken into manageable actions, there may be more people willing to volunteer their time for specific tasks, therefore spreading the load (many hands make light work) and working towards reducing the responsibility on a few volunteers.

By outlining a budget for each action, this not only determines if each goal is achievable with the Club’s finances, but also provides the framework for the Club’s budgets for the period of the Plan.

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| **Note:** In the Key Focus Area template, the two columns titled ‘Responsibility’ and ‘Support needed from’ are deliberately omitted from this step. The idea is to focus on identifying what needs to be done first and gaining consensus on the Plan before allocating actions. |

**Step 9 – Stakeholder input**

This final round of stakeholder input is based on the actions developed by the Strategic Plan Meeting Group in Step 7 – Meeting #3.

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| **Tip:** There may be some stakeholders who are seeing the draft Plan for the first time. Perhaps include a short summary of the process and consultation you have completed to date. |

**Step 10 – Meeting #4: Approval**

The focus on this meeting is to approve the draft Strategic Plan

The aims for this meeting are:

1. Summary – Update on progress to date
2. Consideration: Stakeholder feedback and amendments required to the draft plan
3. Consensus: Endorsement of the Strategic Plan
4. Summary of Progress & Next Steps

Download: Meeting 4 PowerPoint Template

The Key Focus Area Templates should be merged into one document to form the Club’s draft Strategic Plan. To ensure that all members of the Strategic Plan Meeting Group has had sufficient time to review and consider the draft, it is suggested that the document is tabled for review ideally two weeks prior to the meeting to enable time to review and consider the document.

Given this is a critical meeting in the finalisation of the Strategic Plan process, consider whether it is beneficial to have all representatives of the Key Focus Area groups in attendance at this meeting. If there are areas of clarification, the group members may then be able to provide clarity as to their thinking.

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| **Tip:** To enable feedback to be actively considered at this meeting, consider presenting the Plan on a screen to enable live updating of changes during the discussion. This may then help to gain approval at the end of the meeting. |

Please note your individual Club’s requirements – Does your Club Committee need to approve the Plan in addition to the Strategic Plan Meeting Group? If so, table the final document ratified at Meeting #4 for the Club Committee to approve.

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| **Note:** The draft Plan has yet to allocate people to actions. This is deliberately part of the process to ensure that there is no confusion with what is required to be actioned by individuals. This also provides an engagement/recruitment opportunity for your wider Club Community in Step 11. |

**Step 11 – Rollout and continual review**

*Rollout*

Celebrate the news that your Club has a new Strategic Plan!

Remember to thank all those who have played a role in the process, particularly:

* Project Leader
* Committee Members
* Strategic Plan Meeting Group Members
* Key Focus Area Facilitators
* Key Focus Area Group Members
* Stakeholders (Players, sponsors, parents, volunteers, Council etc)

Share the new Plan with your Club and thank them for their contribution to shaping the future of the Club. Use this as an opportunity to recruit people to select a goal or specific action that they would like to be responsible for or to support.

The way you communicate your Plan will be unique to your Club. When doing so, consider:

* Opportunities to publicly thank those involved
* How to get volunteers to action the Plan

*Continual review*

Now you have an updated Plan, it is important that the hard work is not lost by forgetting about the Plan. To continue with the momentum built in the development of this process, consider:

* Add *Strategic Plan Progress* to each agenda of the Committee.
	+ Add columns to the Plan titled *Progress* and *Status* (see below, in orange)*.* This helps the Committee to see where support may be needed to complete tasks and forms your Committee papers.

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Step** | **Action** | **Responsibility** | **Support needed from** | **Budget** | **Date Start** | **Date End** | **Progress** | **Status** |
| 1 |  |  |  |  |  |  | Notes on progress of action | Could be listed as:* In progress
* Disruption
* Overbudget
* Complete
 |
| 2 |  |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |  |  |

* Ensure that the Club’s budget and financial reporting factors is based on the Plan. Financial reporting based on the goals of the Plan enables clear tracking and monitoring of progress – another check and balance that things are on track.
* Adding a 6-monthly review on progress on the Plan. This is a broader discussion on whether updates or amendments to the Plan are required based on changes to the environment or other factors/opportunities.

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