



# FACT SHEET

## Strategic Planning

### Introduction

All organisations should have a plan which guides the strategic direction of their group into the future. The process of preparing a Strategic Plan should be a collaborative effort between the committee and members. It is an opportunity to develop an agreed direction for the organisation and shared responsibility to help steer the group in that direction. A Strategic Plan has the potential to foster collective partnerships amongst committee members, participants and other supporters and to generate renewed enthusiasm for the organisation.

### Components of a Strategic Plan

A Strategic has three main elements:

- *Analysis of current situation* – investigation and analysis of the current situation for the organisation, including issues and potential opportunities.
- *Setting a strategic direction* – outline of the vision for the future, including specific goals and objectives the group seeks to achieve.
- *Developing an Action Plan* – a schedule detailing the actions required to be taken to realise the vision, goals and objectives.

### Undertaking Strategic Planning

This template is intended to assist your club to develop a Strategic Plan. Preparation of a Strategic Plan should involve three core steps:

1. *Background research* - a preliminary meeting (or two) of the committee and completion of sufficient research to understand the organisations current situation. This is where we recommend you also undertake the **Go Clubs Health Check**. You can find this on the Go Clubs website under [resources](#) or [governance](#)
2. *Planning workshop* - a full-day workshop attended by the committee and other members to discuss the current situation, set a strategic direction and develop an action plan.
3. *Finalise plan* - tidy up the draft plan, obtain feedback on the draft plan, and develop a final plan for adoption by the committee.



## Preparation Tips

In preparing a Strategic Plan, your club should consider the following:

- The plan should be developed collaboratively in a transparent and inclusive process with members. Don't allow the Strategic Plan to be developed by a single individual who 'has the answers'.
- Encourage participation outside of your executive committee, inviting members, parents, volunteers and other stakeholders to help build your plan.
- Be prepared by undertaking research prior to your planning workshop:
  - Complete the Go Clubs 'Health Check' prior to embarking on your Strategic Plan so you have a good understanding of your club's current status.
  - Conduct a brief survey of all members prior to preparing your plan to gain an understanding of your member's views on what is 'good' and 'bad' about the organisation, what issues exist and what opportunities should be explored. The results of this survey can be used as a foundation for your 'current situation' analysis.
  - Analyse your financial records, including financial position over the past few years.
  - Analyse membership figures to see if there are any trends over the past few years such as an increase in overall participation, and changes to age and gender groups.
- Bring in an external person to facilitate your planning workshop. This independent person may be from another organisation, from your regional or state associations, or a professional facilitator. An external facilitator will be invaluable in keeping your workshop on track, drawing out important issues for discussion summarising the information being discussed, and managing group dynamics and personalities at the meeting.
- Ask stakeholders outside of your group to provide feedback on your draft plan, e.g., parent bodies, development officers, contacts at Council. It is always helpful to get a second opinion to ensure an important issue or opportunity has not been missed.
- The Strategic Plan should be formally adopted by your club committee and displayed in your clubhouse and on your website.
- Personalise the Strategic Plan. Add in your logo, photos and reformat into your colours.



## Implementation Tips

The following should be considered in the implementation of your Strategic Plan:

- The Strategic Plan should be prominently displayed in your clubhouse and on your website, and electronic copies distributed to all members who wish to obtain a copy. Make sure key stakeholders outside of the organisation are aware of your Strategic Plan. Provide copies to your local Councillor, peak body and sponsors to ensure all potential supporters are aware of your aspirations.
- A committee member should be designated the responsibility of overseeing the implementation of the Strategic Plan, with tasks shared amongst various committee members, officials, and volunteers.
- The Strategic Plan should feature prominently in regular reporting. The officer responsible for implementation of the Strategic Plan should frequently report on the progress of it and implementation to the committee (e.g., standing agenda item), which should be recorded in minutes and communicated to members.
- In order to give your group, the greatest chance of successfully implementing the Strategic Plan, the tasks outlined in the Action Plan should be incorporated into your annual budget, with funding applications submitted to supplement the main income streams accordingly.
- The Strategic Plan should be reviewed annually in a formal way such as an annual planning workshop, to check on progress and review priorities, making adjustments to the Action Plan as required.
- A new Strategic Plan should be prepared every five years to seek a 'fresh' perspective on the future and involve current members.