**A sample strategic plan**

**DATE:**

**Name of your organisation**

**Strategic plan**

***Period of the plan***

Business contact details:

Telephone:

Facsimile:

Website:

 Name Telephone

President

CEO or Executive Director

Date of plan:

**Signature page**

It is always important to ensure key personnel are committed to the plan. Empower them by encouraging their input into the planning process and signing this signature page once the contents are agreed upon.

**Modify this to reflect your organisational structure.**

The Strategic plan has been developed, agreed to and signed off by the following stakeholders of (name of the organisation):

|  |  |  |
| --- | --- | --- |
| **Directors of the Board or** **Committee of Management**  | **Directors responsible for**  | **Signature** |
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If no paid staff amend to committee

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| **Management** | **Position** | **Signature** |
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| **Committee** | **Position** | **Signature** |
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Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Executive summary**

The Strategic plan will play an integral role in managing the SSO and achieving its goals over the next three (three, four, or five) years.

It will be used extensively by the Board.

When necessary, it will be modified to reflect the ongoing development and needs of the SSO.

The executive summary is to give a brief overview of the organisations line of business.

Include topics such as:

* an outline of past achievements
* future goals/objectives (strategic direction)
* planned major events
* recommendations.

**Table of contents**

List the content of the strategic planning documents and relevant page numbers.

|  |  |
| --- | --- |
|  | Page number |
| Cover sheet |  |
| Signature page |  |
| Executive summary |  |
| Table of contents |  |
| List of major assumptions |  |
| List of critical success factors and issues facing your organisation |  |
| Organisation history |  |
| Vision of the organisation |  |
| List of goals and objectives over the long term |  |
| Tables identifying key performance areas, goals, objectives, strategies, action plans |  |
| Management structure |  |
| SWOT analysis |  |
| Financial data |  |
| Appendices |  |

**Major assumptions**

**Short and long term objectives and key performance areas**

Clearly detail all the assumptions made to determine the goals, objectives, strategies and action plans.

**Critical success factors and issues facing the organisation**

Discuss the factors that significantly impact upon the organisation’s ability to be successful.

Organisations are faced with a number of issues that are likely to have a direct impact on the implementation of the plan. These issues have been addressed in this Strategic plan.

Listed are some sample issues.

* Decrease levels of funding from sources such as sponsorship, fundraising, government
* Issues corporate governance – role of the board, regions, committees, directors, relationship between Executive and management/staff, reporting lines between Executive/management/committees.
* Servicing of member organisations
* Implementation of education and training programs
* The decline in volunteers
* Lack of a unified approach to strategic planning and coordination
* Regional development
* Allocation and management of human resources
* Marketing and promotion of Sports Council to corporates, government, and the general community

**SAMPLE below**

OUTCOMES

The following outcomes reflect what the sport wants to achieve over the next three (3) years:

* financial stability and growth
* the sport to have strong market position
* be recognised as leader in best governance and management
* increase support to member organisations
* member organisations to implement the strategies of the SSO
* increase levels of sponsorship and fundraising
* effective Governance and management practices in place
* effective volunteer management plan
* athlete membership growth and participation
* effective sport education programs
* greater level of support from sporting organisations

**Organisation history**

A short overview of historical milestones and past achievements of the organisation.

**Vision of the organisation**

Following the pre planning exercise you undertook to determine the mission and vision of your organisation, develop a clear statement to encapsulate what your organisation does and its philosophies.

**Mission statement**

A clear statement of what the organisation does

**Corporate vision**

Is a vivid picture of where the members want the organisation to be?

**List of goals and objectives over the long term**

State the organisation’s long-term goals and objectives. It is helpful to arrange these in key performance areas.

**Key performance areas (KPAs)**

Key performance areas are those general areas of operation within an organisation, e.g. marketing, where a desired outcome is required over the period of the strategic plan and beyond.

Focus areas are those specific operational areas within a key performance area. For example, a focus area within the KPA of marketing would be sponsorships.

Examples shown below:

|  |  |  |
| --- | --- | --- |
| **KPA** | **Focus area** | **Goal or objective** |
| Administration | Office administration | Produce agendas for and minutes of meetings |
| Corporate governance | Develop a governance manual |
| Organisational Health Survey  | Undertake annual survey |
| Marketing  | Sponsorship | Obtain two shirt sponsors |
| Fundraising | Increase fundraising monies by 20% |
| Merchandise | Sales of branded sport specific equipment |
| Promotions | Produce registration flyer to be distributed  |
| Communications | Produce monthly newsletter |
| Participation and athlete development | Events | Organise gala day |
| Participation development | Increase player numbers by 10% |
| Juniors/schools | Increase team numbers |
| Coaching | To have five level 1 and two Level 2 coaches qualified |
| High performance programs | Increase number of players in rep teams by 5% |
| Finance | Operational budgets | Produce yearly operating budget |
| Cash flow forecasts | Provide a 12-month cash flow budget |
| Financial reporting | Produce balance sheet and profit and loss statements |
| Banking | Set up EFT facilities at club house. |

Name of the organisation Inc.

STRATEGIC PLAN (Period i.e. \_\_\_\_\_\_\_\_\_\_\_)

**Sample only**

NOTE: if you are a large organisation you could have a worksheet for each focus area. Most small organisations may have one worksheet only for each KPA and combine their focus areas - the choice is yours.

KEY PERFORMANCE AREA: Administration

Focus area: Corporate governance structure and management practices

Goal: To introduce best governance and management practices

Objectives: To optimise the performance of the organisation

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Strategies | Actions | Responsibility | Time Line | Forecast | Performance Outcome | Priority |
| 01 | 02 | 03 | 04 | 05 |
| Review report on governance | Executive and management to meet with Board | ExecutiveEO |  |  |  |  |  | Nil | To improve organisational effectiveness | High |
| Develop a governance manual | Executive to discussAttend workshop | ExecutiveEO |  |  |  |  |  | TBD | To have written policy | Priority |
|  |  |  |  |  |  |  |  |  |  |  |

KEY PERFORMANCE AREA: Marketing

Focus area: Sponsorship

Goal: Financial stability and viability

Objectives:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Strategies | Actions | Responsibility | Time line | Forecast | Performance outcome | Priority |
| 01 | 02 | 03 | 04 | 05 |
|  |  |  |  |  |  |  |  |  |  |  |
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KEY PERFORMANCE AREA: Operations

Focus area:

Goal:

Objectives:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Strategies | Actions | Responsibility | Time line | Forecast | Performance outcome | Priority |
| 01 | 02 | 03 | 04 | 05 |
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KEY PERFORMANCE AREA: Finance

Focus area: Accounting and management practices

Goal:

Objectives:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Strategies | Actions | Responsibility | Time line | Forecast | Performance outcome | Priority |
| 01 | 02 | 03 | 04 | 05 |
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**Implementation plans**

Implementation plans should be completed soon after the strategic planning process has finished.
Implementation plans state:

* key performance areas (KPA)
* each goal
* each objective
* strategy developed
* people responsible for taking action
* dates by which actions must be completed
* progress reports.

Implementation plans should be working documents to be reviewed at regular intervals.

**Sample implementation plan**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **KPA** | **GOAL** | **OBJECTIVE** | **STRATEGY** | **DATE** | **RESPONSIBILITY** | **PROGRESS REPORT** |
| E.g. Administration | To establish communication pathways which embrace all members | To upgrade reporting systems and communication channels | Create a club contact list for each affiliate | 31July, 2019 | Office staff |  |
| E.g. Athlete development | To improve the skills of all elite players | To maintain and improve the current success and implement procedures to assist with the streamlining of the softball programs | Implement Mentor Coach Program with regional coaches | 31 July, 2019 | Coaching Director | Trainee coaches appointed; head coaches acting as mentors |
| E.g. Marketing, promotion and sponsorship | To obtain sponsorship for the NSWSA, its events, programs and publications | To develop appropriate sponsorship packages | Staff and board to develop corporate contacts | Ongoing | Staff and board | Several proposals drafted and under consideration |

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**Implementation plan template**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **KPA** | **GOAL** | **OBJECTIVE** | **STRATEGY** | **DATE** | **RESPONSIBILITY** | **PROGRESS REPORT** |
|  |  |  |  |  |  |  |
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**Management structure**

**(sample shown)**

**Role of [Name of Organisation Incorporated]**

**The Board**

|  |  |
| --- | --- |
| **The board of NSW Sporting Organisation Inc.** |  |
| Primary role |  |
| Composition |  |
| Meet |  |
| President |  |

**Role of standing and ad hoc committees**

**Standing committees**

The rules by which the standing committees operate are outlined in the Constitution of name of the organisation.

|  |  |
| --- | --- |
| **Finance committee** |  |
| Primary role | Provide sound financial management advice to The Board of NSW SPORTING ORGANISATION Inc and preparation of budgets |
| Composition |  |
| Meet |  |
| Convenor |  |

|  |  |
| --- | --- |
| **Marketing and promotion committee** |  |
| Primary role | Develop and implement marketing strategies in accordance with the Strategic plan. |
| Composition |  |
| Meet |  |
| Convenor |  |

|  |  |
| --- | --- |
| **Coach and referee management committee** |  |
| Primary role |  |
| Composition |  |
| Meet |  |
| Convenor |  |

|  |  |
| --- | --- |
| **Competitions committee** |  |
| Primary role | Liaise with clubs in accordance with the strategies of the Strategic plan. |
| Composition |  |
| Meet |  |
| Convenor |  |

|  |  |
| --- | --- |
| **Representative selection committee** |  |
| Primary role | Develop selection policy for the selection and appointment of Representative teams in accordance with the strategies of the Strategic plan. |
| Composition |  |
| Meet |  |
| Convenor  |  |

|  |  |
| --- | --- |
| **Schools committee** |  |
| Primary role | Develop a school’s feeder system policy in accordance with the strategies of the strategic plan. |
| Composition |  |
| Meet |  |
| Convenor  |  |

**Ad hoc committees**

Ad hoc committees should be established on short term basis for specific purposes as follows:

|  |  |
| --- | --- |
| **Sponsorship** |  |
| Primary role | Develop and implement sponsorship strategies in consultation with the Marketing and Promotions Committee and under the direction of the Board of NSW SPORTING ORGANISATION Incorporated. |
| Composition |  |
| Meet |  |
| Convenor  |  |

**Organisational flowchart**

Create an organisational flow chart based on your structure

Example:

**MEMBERS**

**Associations or Clubs**

**The Board**

**Standing**

**Committees**

**MANAGEMENT**

**Environmental and marketing analysis**

The SWOT analysis has two purposes:

* to help identify where the sport is now
* to prepare the sport to develop a strategy that will use the organisation’s strengths, manage its weaknesses, take advantage of opportunities and minimise the impact of those threats that become real.

The goals, objectives and strategies in this strategic plan aim to bridge the gap between where the (name of the organisation) is now, and the vision of where the organisation wants to be in the future.

# Environmental analysis

Example:

|  |  |  |
| --- | --- | --- |
|  | **Strengths** | **Weaknesses** |
|  | Our STRENGTHS in the internal environment:* People – Executive Officer and staff
* Venue
* Skills and expertise
* Events
* Athletes
* Training and development
 | Our WEAKNESSES in the internal environment:* Lack of funds to reach all areas to broaden participation
* Not enough human resources
* Not enough volunteers
* Ineffective structure
* Ineffective governance and management practices
* Ineffective Regions
* Poor strategic direction, planning and review
* Communication
* Internal conflicts
 |
|  | **Opportunities** | **Threats** |
|  | Our OPPORTUNITIES in the external environment:* Increase in athlete membership
* Marketing and promotion
* Strategic alliances with other Organisations including entrepreneurs, government;
* Current venue to raise revenue
* Products and services that can promote revenue
* Olympic legacy
* Increase support from government
* Internet, promoting the sport
 | THREATS in the external environment:* Lack of revenue
* Declining membership
* Decline in corporate support
* Rising costs
* Market presence
 |

**Financial assessment**

1. **Financial management systems**

There is no one model of a financial management system that suits all organisations, but there are some basics that must be in place to achieve good practice in financial management.

It is helpful to identify certain principles when developing a financial management system and including financial information in your plan. These will act as a guide to your board or COM as the trustees of the organisation and managers when making decisions.

1. **Guiding principles for financial management systems**
* **Consistency:** your financial policies and systems must remain consistent over time.
* **Accountability:** you must be able to explain and demonstrate to all stakeholders how you have used your resources and what you have achieved.
* **Transparency:** your organisation must be open about its work and its finances, making information available to all stakeholders.
* **Integrity:** individuals in your organisation must operate with honesty and propriety.
* **Financial stewardship:** your organisation must take good care of the financial resources it has been given and ensure that they are used for the purpose intended.
* **Accounting standards:** your organisation's system for keeping financial records and documentation must observe accepted Australian Accounting Standards: click [here](http://www.aasb.gov.au/)

**3. The annual program budget summary**

Both the annual and the three, four, or five yearly program budgets provide an instant recognition of the forecast costs associated with the conduct of the sporting organisation. The financial assessment is an important reflection of the funds needed in order to achieve a given level of results. They are also important as an input into the organisations budgetary process and should be regularly updated.

Example:

The annual program budget summary for the period (provides a snapshot of the forecast budget requirements for the given period).

Estimated expenditure $ Estimated income $

Key performance area

* Administration
* Marketing
* Operations
* Finance

# Total expenditure Total income

 Surplus/(Deficit)

Explanatory notes

Two examples of financial models are given. A cash flow forecast budget and operating budget forecast.

Note: Most for-profit corporates (companies) use forecast models for profit and loss, balance sheet and cash flow.

Your organisation may use computerised accounting systems, i.e. MYOB – products such as this produce format forecast budgets, therefore, you may wish to include these.

For more information regarding director’s responsibilities in regards to your organisations finances refer to the Financial Management Tool Kit located on the Running Your SSO portal at https://sport.nsw.gov.au/clubs/rysso

**The cash flow forecast**

For any business, the cash flow forecast is a must do document that needs to be prepared on a regular basis. Directors of the Board and managers need to know the amount of cash coming into the organisation and whether the organisation can meet its obligations when due.

**The operating budget forecast**

Provides the forecast of assumptions of income and expenses and includes the previous year’s figures as a means of comparison.

**EXAMPLE ONLY**

**NSW Sporting Organisation Inc.** (Change months according to financial cycle)

#####  Cash flow forecast budget for the year ended 30 June

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Months | Jan | Feb | Mar | Apr | May | June | July | Aug | Sept | Oct | Nov | Dec |
| INCOME |  |  |  |  |  |  |  |  |  |  |  |  |
| Registration fees |  |  |  |  |  |  |  |  |  |  |  |  |
| Event income |  |  |  |  |  |  |  |  |  |  |  |  |
| Merchandising |  |  |  |  |  |  |  |  |  |  |  |  |
| Sponsorship |  |  |  |  |  |  |  |  |  |  |  |  |
| Interest received |  |  |  |  |  |  |  |  |  |  |  |  |
| Grants |  |  |  |  |  |  |  |  |  |  |  |  |
| Other income |  |  |  |  |  |  |  |  |  |  |  |  |
| TOTAL INCOME |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |
| EXPENSES |  |  |  |  |  |  |  |  |  |  |  |  |
| Affiliation fees |  |  |  |  |  |  |  |  |  |  |  |  |
| Accountancy and auditing fees |  |  |  |  |  |  |  |  |  |  |  |  |
| Bad debts  |  |  |  |  |  |  |  |  |  |  |  |  |
| Bank charges |  |  |  |  |  |  |  |  |  |  |  |  |
| Computer expenses |  |  |  |  |  |  |  |  |  |  |  |  |
| Capital expenditure |  |  |  |  |  |  |  |  |  |  |  |  |
| Electricity |  |  |  |  |  |  |  |  |  |  |  |  |
| General expenses |  |  |  |  |  |  |  |  |  |  |  |  |
| Insurance |  |  |  |  |  |  |  |  |  |  |  |  |
| Interest |  |  |  |  |  |  |  |  |  |  |  |  |
| Leasing |  |  |  |  |  |  |  |  |  |  |  |  |
| Legal fees |  |  |  |  |  |  |  |  |  |  |  |  |

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Jan | Feb | Mar | Apr | May | June | July | Aug | Sept | Oct | Nov | Dec |
| Motor vehicle expenses |  |  |  |  |  |  |  |  |  |  |  |  |
| Newsletter |  |  |  |  |  |  |  |  |  |  |  |  |
| Office expenses |  |  |  |  |  |  |  |  |  |  |  |  |
| Printing and stationery |  |  |  |  |  |  |  |  |  |  |  |  |
| Promotions |  |  |  |  |  |  |  |  |  |  |  |  |
| Purchases (merchandising) |  |  |  |  |  |  |  |  |  |  |  |  |
| Registration fees |  |  |  |  |  |  |  |  |  |  |  |  |
| Rent |  |  |  |  |  |  |  |  |  |  |  |  |
| Repairs and maintenance |  |  |  |  |  |  |  |  |  |  |  |  |
| Salaries and wages |  |  |  |  |  |  |  |  |  |  |  |  |
| Staff training |  |  |  |  |  |  |  |  |  |  |  |  |
| State team expenses |  |  |  |  |  |  |  |  |  |  |  |  |
| Subscriptions |  |  |  |  |  |  |  |  |  |  |  |  |
| Superannuation |  |  |  |  |  |  |  |  |  |  |  |  |
| Telephone and fax |  |  |  |  |  |  |  |  |  |  |  |  |
| Travel and accommodation |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |
| TOTAL EXPENSES |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |
| NET INCOME |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |
| CASHFLOW $  |  |  |  |  |  |  |  |  |  |  |  |  |

**EXAMPLE ONLY**

**NSW Sporting Organisation Inc.**

Operating budget for year ending: \_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |
| --- | --- | --- | --- |
| ACTUALS |  |  |  |
| LAST YEAR $ | INCOME  | This year being | ASSUMPTIONS |
|  | Registration fees |  |  |
|  | Event income |  |  |
|  | Merchandising |  |  |
|  | Sponsorship |  |  |
|  | Interest received |  |  |
|  | Grants |  |  |
|  | Other income |  |  |
|  |  |  |  |
|  | TOTAL INCOME |  |  |
|  |  |  |  |
|  | EXPENSES |  |  |
|  | Affiliation Fees |  |  |
|  | Accountancy and auditing fees |  |  |
|  | Bad debts  |  |  |
|  | Bank charges |  |  |
|  | Computer expenses |  |  |
|  | Capital expenditure |  |  |
|  | Electricity |  |  |
|  | General expenses |  |  |
|  | Insurance |  |  |
|  | Interest |  |  |
|  | Leasing |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| ACTUAL |  |  |  |
| LAST YEAR  | EXPENSES | This year being | ASSUMTPIONS |
|  | Legal fees |  |  |
|  | Motor vehicle expenses |  |  |
|  | Newsletter |  |  |
|  | Office expenses |  |  |
|  | Printing and stationery |  |  |
|  | Promotions |  |  |
|  | Purchases (merchandising) |  |  |
|  | Registration fees |  |  |
|  | Rent |  |  |
|  | Repairs and maintenance |  |  |
|  | Salaries and wages |  |  |
|  | Staff training |  |  |
|  | State team expenses |  |  |
|  | Subscriptions |  |  |
|  | Superannuation |  |  |
|  | Telephone and fax |  |  |
|  | Travel and accommodation |  |  |
|  |  |  |  |
|  | TOTAL EXPENSES |  |  |
|  |  |  |  |
|  | NET INCOME |  |  |

**Monitor and review of the plan**

The strategic plan should be monitored and reviewed on a monthly, quarterly, and yearly basis by the Board.

Directors of the Board will be responsible for their designated portfolio and must prepare a short-written report on the activities of their standing committees or ad hoc committees at meetings of the Board.

The Chair in accordance with the Constitution should have overall responsibility to members for the implementation and review of the Strategic plan and other functions of the SSO.

The yearly review will take place prior to the end of each financial year 30 June or calendar year as determined by the Board in accordance with the Constitution and the Act.

The table below sets out an example of a review timetable for State sporting and recreation organisations:

|  |  |  |  |
| --- | --- | --- | --- |
| **Strategic planning** | Update | **Total Review** | **Responsibility** |
| Values, vision, mission | Six-monthly, but only if required | Annually | Board/Management |
| Environmental analysis | Six-monthly | Annually | Board/Management Committees |
| Strategy formulation | Six-monthly, but only if required | Annually | Board/Management Committees |
| Targets | Monthly | Quarterly and Annually | Board/Management Committees |
| By laws, rules & Constitution | Annually | Annually | Board/Management Committees |
| Financial plans | Monthly | Annually | Board/Management Committees |
| Resource requirements and action planning | Weekly, daily | Monthly | Board/Management Committees |
| Entire business plan | Annually | Annually | Board/Management Committees |
| Evaluation | Quarterly | Annually | Board/Management Committees |