



Listen to our
podcast

Search for Basket Case Clubs



WEBINAR TO BEGIN SHORTLY

Strategic Planning

Presented by: Matt McEwan



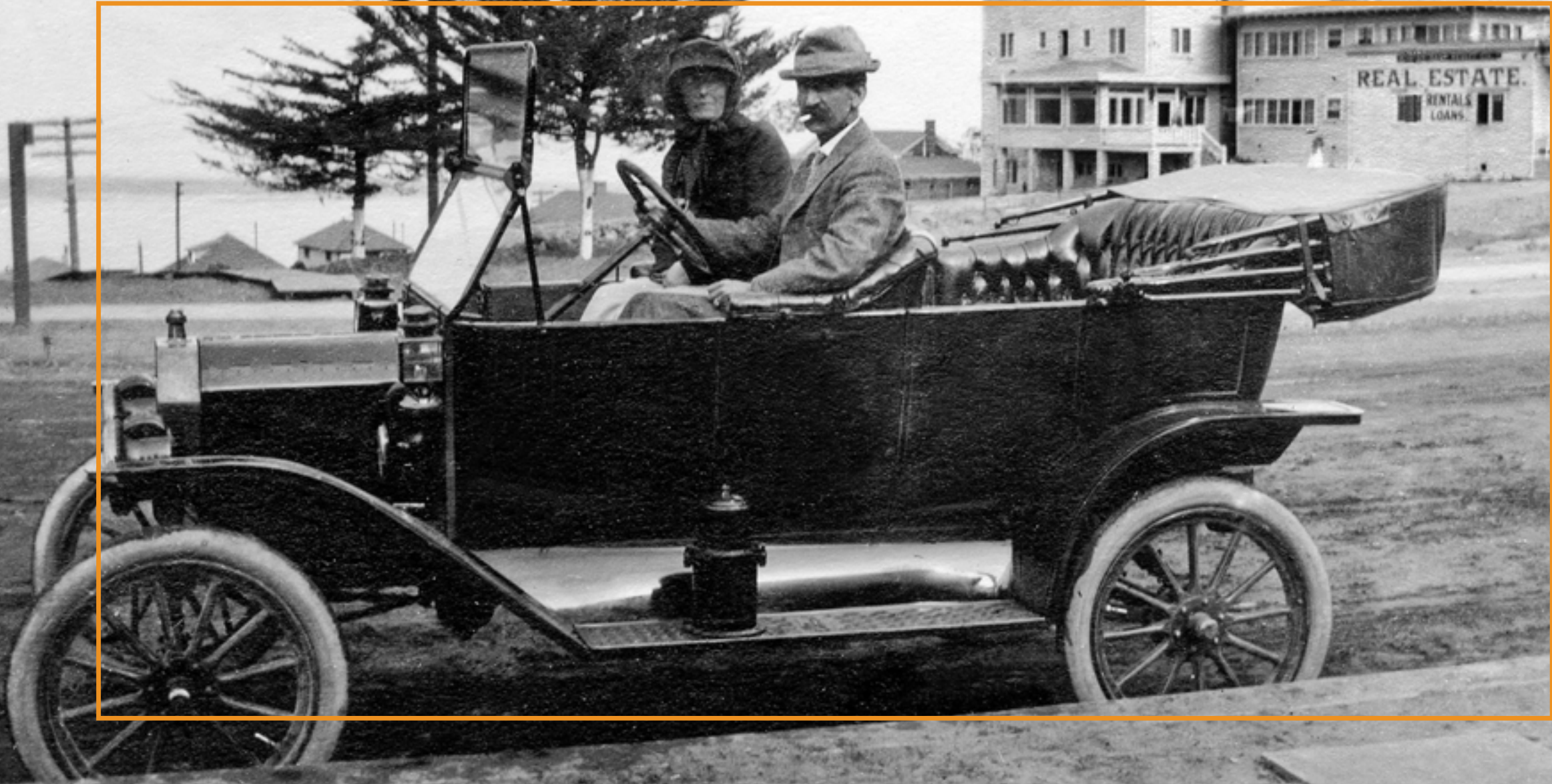
SURFING
AUSTRALIA

Surfing Australia Strategic Planning

Kick-start your club's future!















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Free Videos
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The Mental Quiver Series
\$50.00

coaching feedback
performance training

A screenshot of a website for 'Video Packages'. The page has a white background with a blue header. The main content area features two video thumbnails. The first thumbnail shows a person surfing on a wave, with the text 'Free Videos' and '\$0.00' below it. The second thumbnail shows a person standing on a surfboard, with the text 'The Mental Quiver Series' and '\$50.00' below it. There are also some tags like 'coaching', 'feedback', 'performance', and 'training'.

Poll

- Which of the following best describes your club's current strategic planning situation?
 1. We have a current, up-to-date strategic plan that we're actively following
 2. We have an expired strategic plan that needs to be revised
 3. We are currently putting together a strategic plan
 4. We've never had a strategic plan before
 5. No idea!

STRATEGIC PLANNING



Keep your plan simple. A simple plan is easy to action. A long and wordy plan won't ever get read!

Start with **why**

Be clear on your purpose

- Objects

Why did you join?

What keeps you coming back?



WHY

HOW

WHAT

standing
o or
This will
th your
n.



2

GOALS

What you want to **ACHIEVE**

Write them down

Think long term, not just about this year's events and activities

What goals can help you achieve your clubs 'WHY'?

It's ok to **DREAM BIG!**



Are you getting stuck?

Try drawing a picture of your ideas for a perfect club.

om



Roadblocks

Goals

- Doable
- Stretch
- Possible...



ussions

3 SWOT



Strengths

What are you good at that's in your control?

Weaknesses

What is in your control that you need to do better?

Opportunities

What could happen that would be good for the organisation (may not be in your control)?

Threats

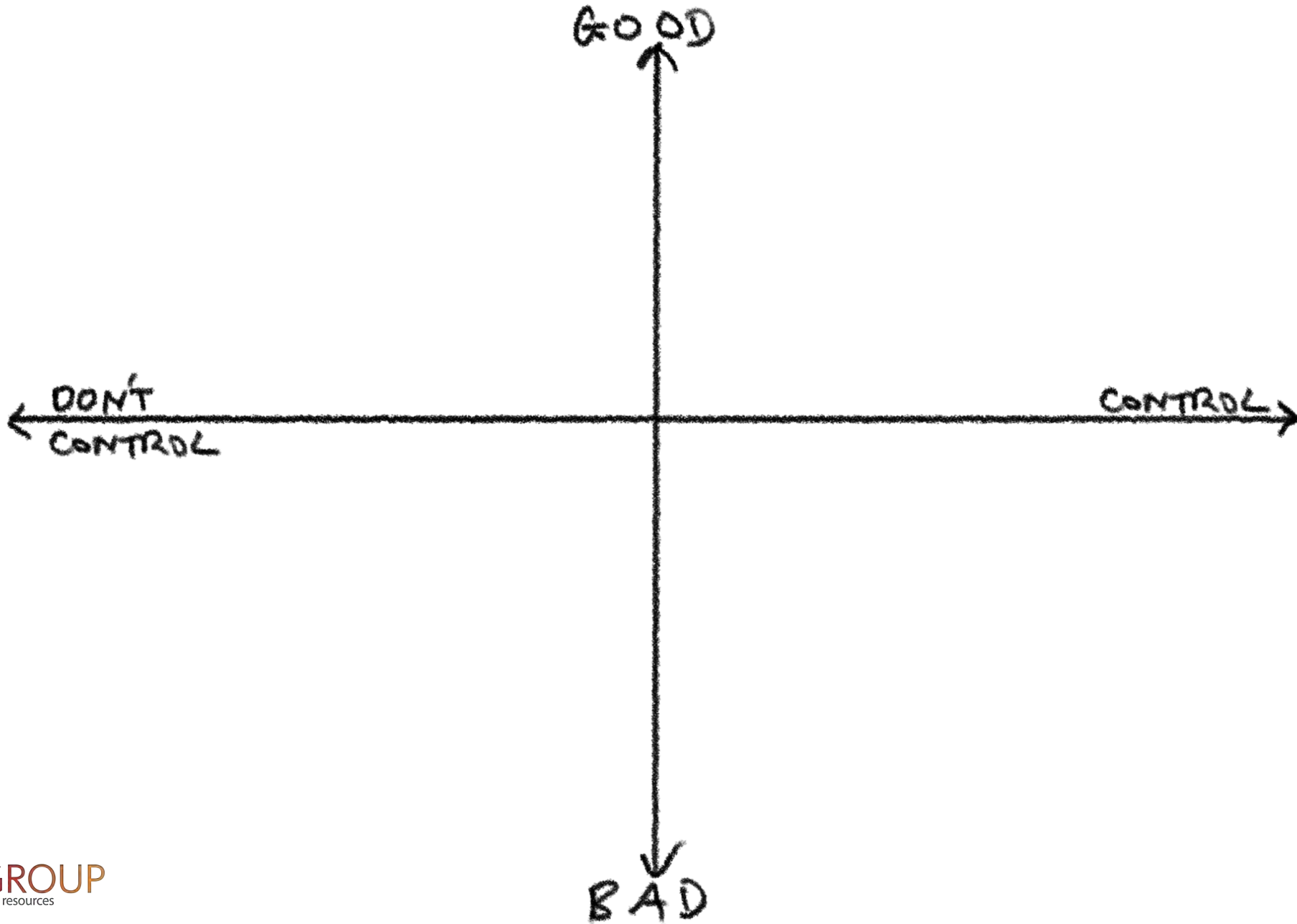
What could cause problems for the organisation in the future?

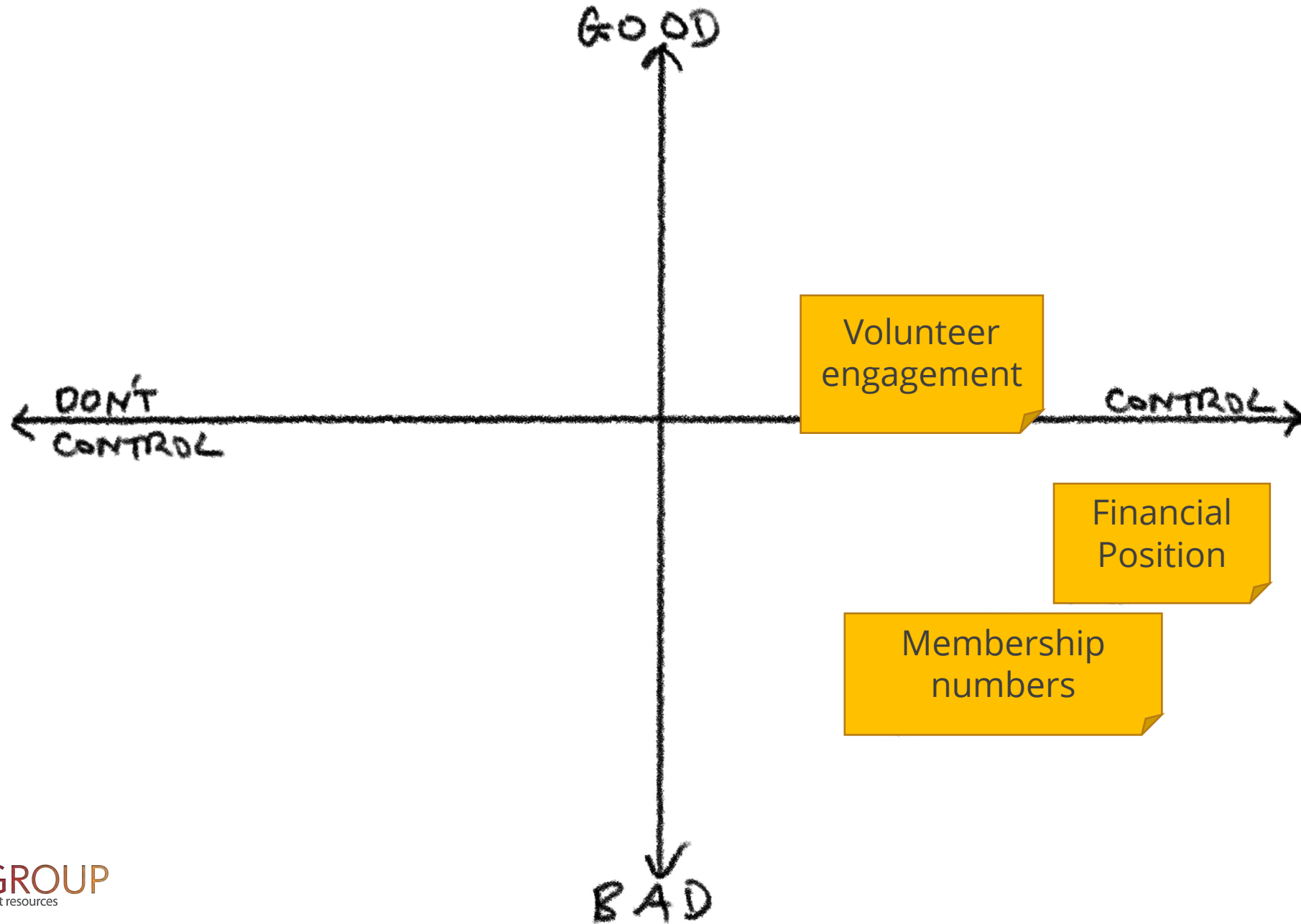
GOOD

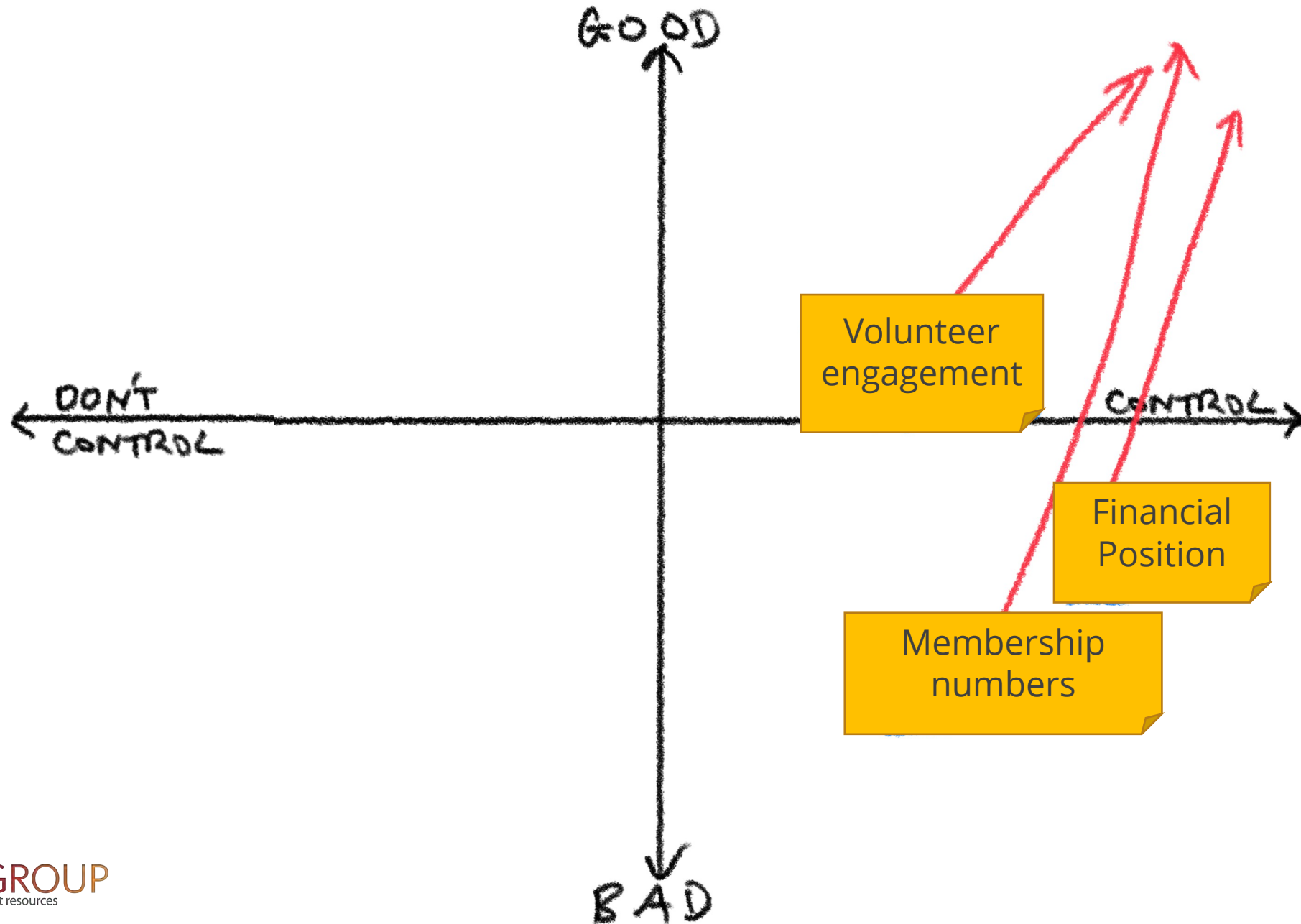


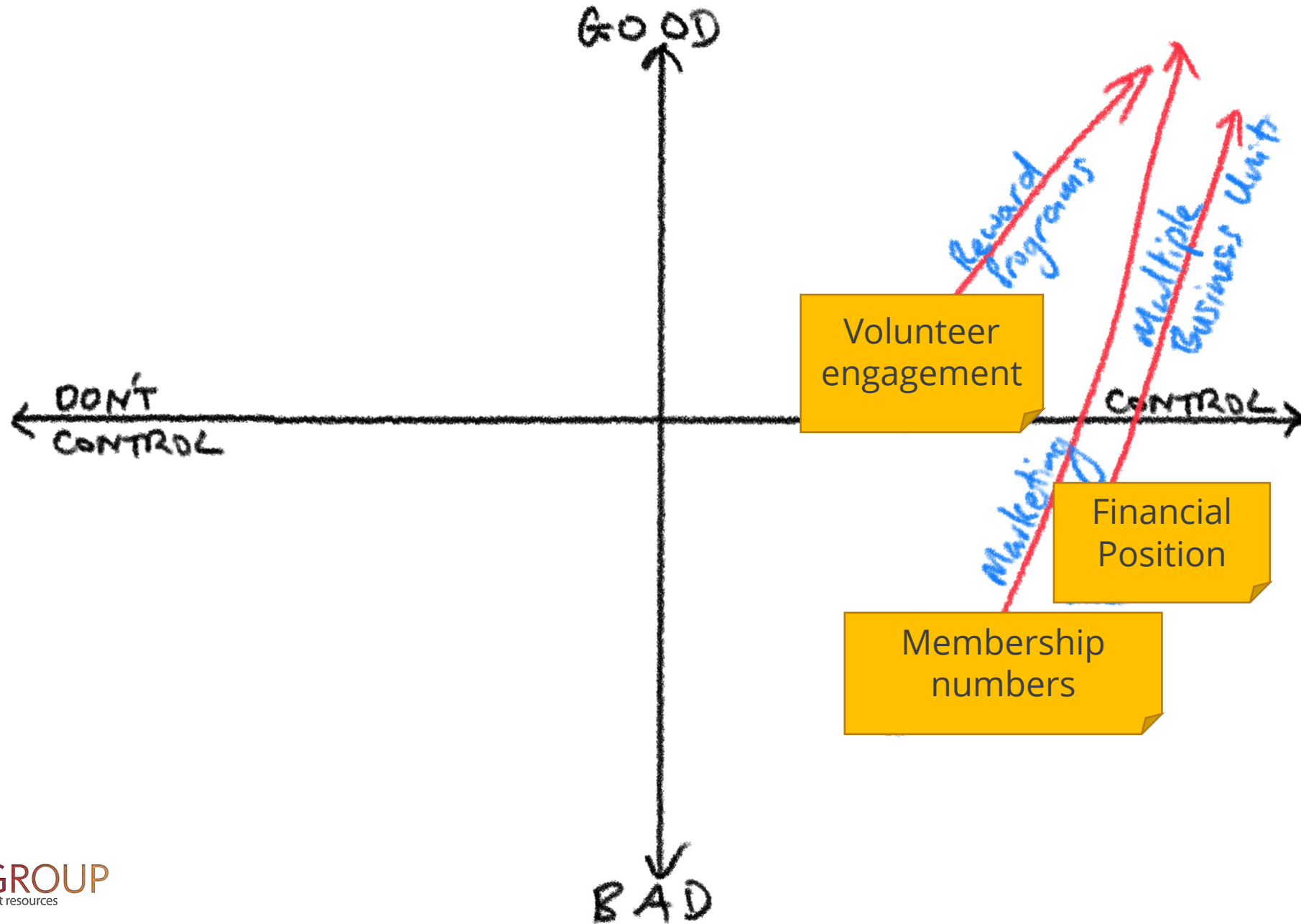
BAD





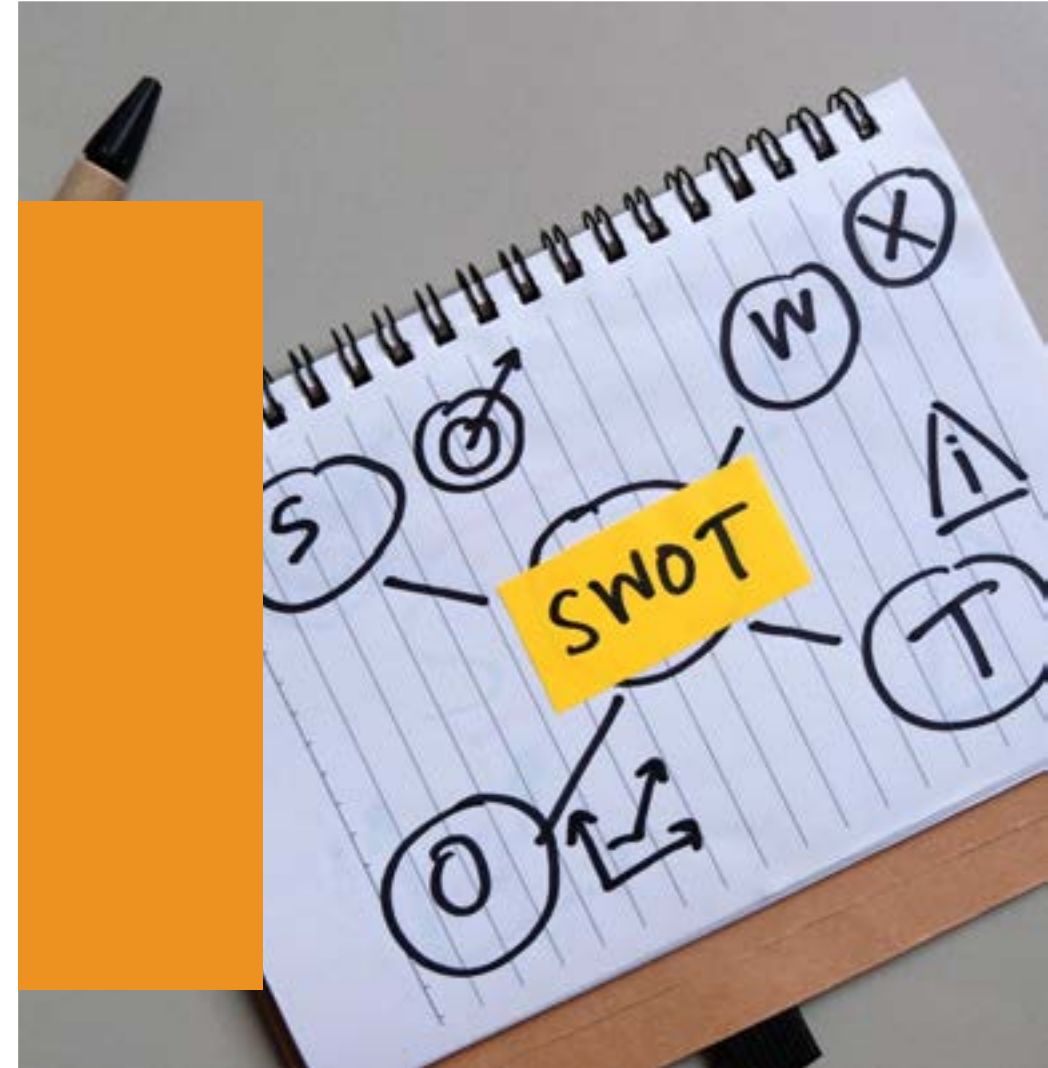






Dynamic SWOT Analysis

- Membership and participation
- Development and pathways
- Governance and administration
- Meetings
- Facilities
- Finances/fees/prices
- People (staff / committee / volunteers)
- Fundraising and grants
- Community engagement
- Different formats
- Member/customer engagement
- Use of technology
- Marketing
- Events and activities
- Relationships (e.g. Council, SA)
- Member and child protection
- Risk management



What do you need to do to achieve your goals?

What can you do to fix your weaknesses?

How can you capitalise on your strengths?

What can you do to chase your opportunities and protect the club from its threats?

4

ACTIONS



A note about **Mission, Vision and Values**

After you've written your goals, SWOT and action plan, you can turn your WHY into your **Mission, Vision and Values.**



Don't over think it!



Mission

A summary of your WHY



Vision

What you want the future to LOOK like



Values

How you will behave in achieving your vision

1

START by understanding WHY your club or association exists. This will be consistent with your constitution.

Seek input from members

Surveys
Workshop
Face-to-face discussions

5

TIMEFRAME AND DELEGATION

Set up a budget to fund each action
Set a timeframe for each action
Delegate each action to a 'leader'
Note estimated costs for each action



IMPLEMENT AND REVIEW

Use your plan like a map to keep you going in the right direction.

The most successful clubs review their goals regularly to make sure they are staying on track.

To see how your actions have been shared around, you can use your action plan to generate separate action lists for committee members and other volunteers

STRATEGIC PLANNING



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Succession Planning

A woman with dark curly hair, wearing a white shirt and a headset, is sitting at a desk in a call center. She has her hand to her forehead, looking stressed or frustrated. In the background, another person is visible, also working at a computer. The scene is dimly lit, with a soft blue and grey color palette.

Why is it so difficult?

Succession

**IT STARTS
WHEN
YOU START**



During The Term



Engage with members



Lead by example



Keep a record



Leading up to the AGM



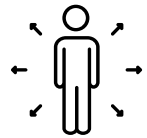
**Tap someone on
the shoulder**



Position descriptions



After the **term**



Handover



Stay in contact



Handover checklist

- Constitution
- Financial records
- Bank accounts (including transferring signatories)
- Property and inventory
- Document templates
- Previous meeting minutes
- Member list
- Calendar of events
- Important dates (e.g. affiliation, purchasing)
- What worked well and what should change
- Important contact details



Handover checklist

- Login credentials or admin access and payment/renewal details for:
 - Website
 - Email
 - Social media accounts
- Cloud file storage
- Other subscriptions and software (e.g. Mail Chimp, Canva, payment gateways, financial software)
- Update all passwords and remove access!

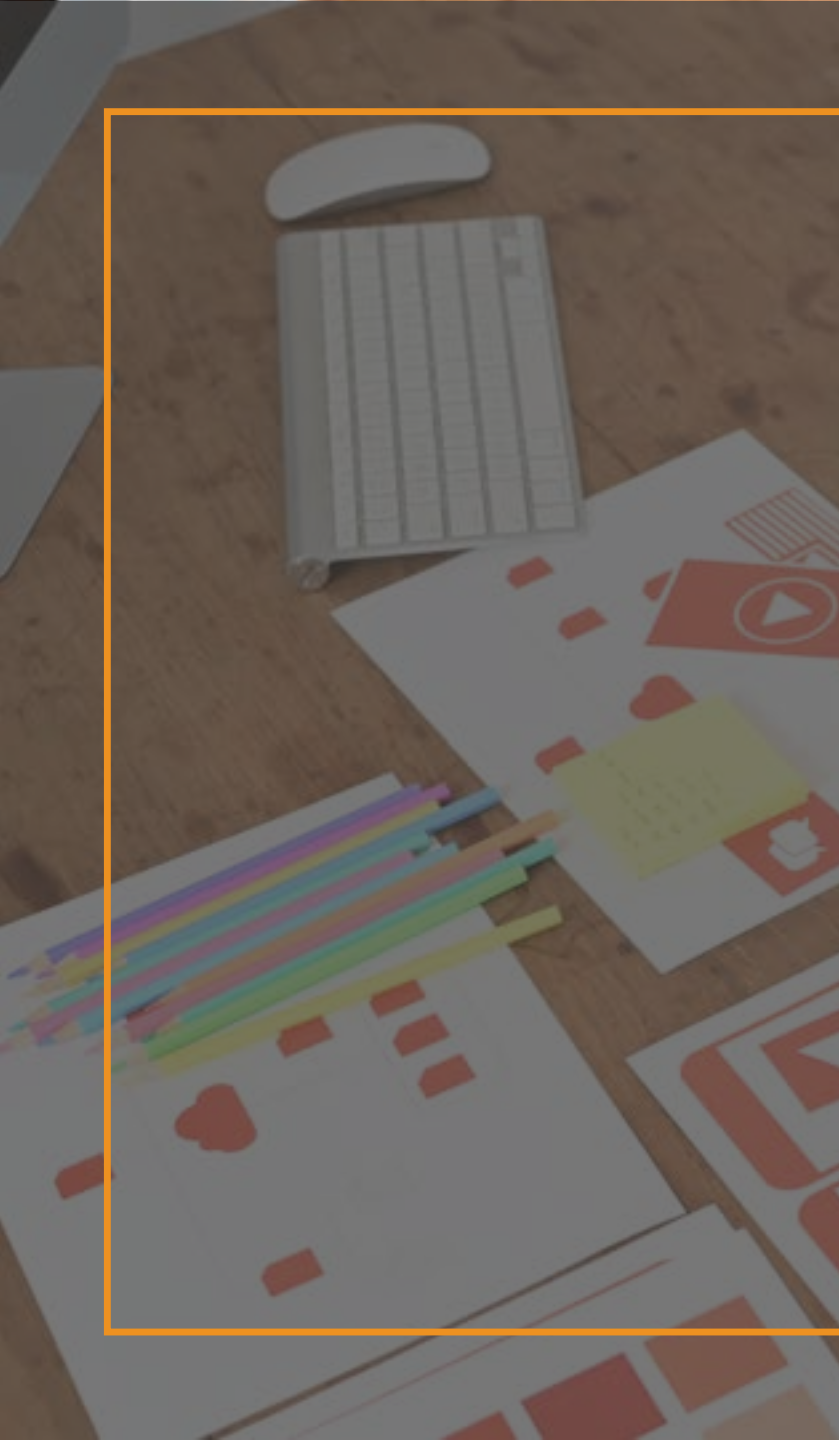


Handover checklist

- Details of external relationships (e.g. sponsors, suppliers, venues)
- Details of regular activities required under each role



Induction



Next Webinar

Webinar 4

Volunteer Recruitment and Engagement

Wednesday 4 October 2023, 6:30pm



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