

Guideline – Strategic Plan Process – August 2023

Purpose

To provide a simple overview of the process to create or refresh a Strategic Plan.

Desired Outcomes of the Strategic Plan

- To create the club's 'north star' to provide direction for the next one to 10 years, including.
 - Purpose.
 - Vision.
 - Values.
 - Strategic Intent.
 - Focus Areas.
- All other foundation documents and processes of the club will be guided by the Strategic Plan including Business Plan, Budget, Facilities Plan etc.

Process to Establish the Strategic Plan

1. Consult with your membership.
 - a. Depending on how big your clubs is this could be through a workshop or survey.
2. Collate feedback from membership.
 - a. Identify the key themes.
3. Host a workshop with your Board/Committee or a selected group.
 - a. Review the feedback from members, and discuss ideas on where the club currently is, what you want to achieve, and vital factors such as purpose, values, and focus areas.
4. Draft Strategic Plan
 - a. Pull together a draft Strategic Plan from the consultation.
 - b. Send this to your Board/Committee for feedback, and wider membership (optional).
5. Refine Strategic Plan
 - a. Digest all feedback and make any applicable amendments.
6. Finalise Strategic Plan and Communicate.
 - a. Sell the story – make sure the Plan is well articulated both to your Board/Committee and membership.

Support

- For the workshop/s, it is advised that you have an independent facilitator, you may know someone who could do this, or your local Regional Sporting Trust, or contact Bowls Auckland for our support.
- Regional Sport Trusts include, Sport Waitakere (West), Sport Auckland (Central/East) and CLM (South).

Enacting Change

1. Bring to life the Strategic Plan via the establishment of a Business Plan (operationalise).

Review

1. Review and evaluate annually at Board level.
2. Review and evaluate every three years with the membership.

Additional Reading / Resources

- Sport NZ have some resources on the topic at <https://sportnz.org.nz/media/1826/planning-in-sport.pdf>
- AKTIVE do too at <https://aktive.org.nz/resource-hub/>

Why – How – What – Simon Sinek

- Simon has the 'Golden Circle' which may help, put into context in terms of planning this could be interpreted as.
 - Why – your Purpose, your Vision (your origin story / north star).
 - How – how you will achieve your Why – your key pillars or Focus Areas.
 - What – what you will do to achieve your focus areas or your Business Plan.
- Below is an insightful clip via YouTube that brings it to life.
- https://www.google.com/search?q=simon+sinek+why+how+what&source=lmns&bih=963&biw=1920&rlz=1C1GCEA_enNZ1029NZ1029&hl=en&sa=X&ved=2ahUKewiw4fWSI--AAxWhzaACHRCeCY8Q_AUoAHoECAEQAA#fpstate=ive&vld=cid:7dfe26ef,vid:u4ZoJKF_VuA

The Golden Circle

WHAT

Every organization on the planet knows WHAT they do. These are products they sell or the services

HOW

Some organizations know HOW they do it. These are the things that make them special or set them apart from their competition.

WHY

Very few organizations know WHY they do what they do. WHY is not about making money. That's a result. WHY is a purpose, cause or belief. It's the very reason your organization exists.

