

**CANADA SOCCER
CLUB MANAGEMENT & OPERATIONS GUIDE**

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INTRODUCTION

In 2017, Canada Soccer moved to develop a Club Licensing Program through which to classify its approximate 1,700 affiliate not-for-profit soccer clubs, associations and private soccer academies/schools¹. The Licensing Program aims to assist affiliate organizations at community level in Canadian soccer in their growth and evolution, while identifying levels of sophistication and organizational capability that allow the activities of clubs/associations/academies to be matched to their capabilities.

To assist affiliates with the growth and progression to higher categories of Club Licence classification, Canada Soccer has developed a number of Guides, that outline what is considered to be best practice in soccer club management. These Guides are being used as a basis for assessment of clubs in their fulfilment of criteria required to fit the profiles of the four categories of classification issued under the Club Licensing Program. To that end, clubs are encouraged to use the Guides as a core reference guide in the management and development of their organizations, and programming therein.

This Guide focuses best practices that can help clubs manage their operations and non-technical activities optimally,

such that they can support optimal programming and maintain the stability of their organization. The Guide is supported by and coordinated with other Guides relating to Governance, Technical, Safety and Accessibility & Inclusion. To that end, this Guide should be studied and applied in tandem with these other Guides, with which there is some interface and mutually-inclusive overlap.

Finally, note that this Guide is not an instruction manual or policy document! It is a genuine guide, aimed at helping clubs be the best they can be, providing positive experiences for their players, coaches, match officials, and volunteers. Whether a club is striving to reach a higher level of Club Licence classification or not, Canada Soccer encourages all affiliates to follow the principles, directions, and standards laid out purely for their own benefit, and at their discretion.

Thank you for taking the time to read this Guide and for your commitment and contributions to soccer in Canada. We hope it is of help to you in your efforts to build great soccer clubs around the country!

LEADERSHIP

In any soccer club, leadership is essential. Whether your club is a small operation with a handful of teams, or a large organization with thousands of players, defined leadership that can set and manage the direction of the club is crucial. The highest level of leadership in your club should be the President or Chairman of the Board of Directors. In private organizations, this may be the Owner if they are actively running the business, or the Chairman of the Board of Directors (who may be the Owner).

Your club should recognize three paradigms of leadership that exist in every club. The first is strategic leadership, which should come from the President, in their role as the leader (Chair) of the club's Board of Directors. The second is executive leadership, which should come from either an Executive Committee in smaller clubs, or an Executive Director (or General Manager) in larger clubs. The third is technical leadership, which should come through a designated Technical Director or Head Coach, who may be a volunteer position in small clubs but a professional appointment in larger clubs.

Each level of leadership has different responsibilities and focus which are quintessential to the management of a strong, effective soccer club. The ability for all three to work as a collective leadership team is a defining characteristic of any strong club.

Role of the President or Owner

The role of the President of the club (or Owner in the case of private companies) is hands-off leadership of the club on behalf of the club's key stakeholders, notably members (or shareholders), customers (largely players and the parents of youth players), governing bodies and major organizational partners (such as municipalities and corporate sponsors). The President should not have an operational role. That is to say that they should not be directly involved in the design and delivery of soccer programs per se. Instead, the President should focus on higher level matters centred around the Board of Directors, broad member wants/needs, and public representation of the club.

Specifically, the President or Owner should be responsible for:

- ▶ Being the spokesperson for the club at major external soccer events and meetings
- ▶ Chairing the club's Annual General Meeting and any Special General Meetings of the membership that may be called
- ▶ Leadership of the Board of Directors, which includes:
 - ▶ Enforcing Board policies and Director fiduciary responsibility
 - ▶ Striking of Board sub-committees

¹ Clubs, associations, academies or any other community-level operators of soccer programs that is affiliated with Canada Soccer will be collectively referred to as 'clubs' in this document.

- ▶ Chairing meetings of the Board of Directors, covering duties such as:
 - ▶ setting of meeting agendas
 - ▶ overseeing approval of meeting minutes
 - ▶ presiding over meetings and facilitating Board discussion
 - ▶ galvanizing and facilitating Board decision-making
- ▶ Day-to-day management of the Executive Director or General Manager (if the club has one)
- ▶ Maintenance of acceptable levels of day-to-day customer service and member liaisons
- ▶ Representation of the club externally as directed by the Board of Directors and in relation to all operational/program matters
- ▶ Marketing and promotions of the club and its programs
- ▶ Non fee-based revenue generation (such as corporate sponsorship, government grants and club-level fundraising/donations)
- ▶ Management of risk in the club's operations and programs

Role of the Executive Director² or Executive Committee

The role of the Executive Director (ED), or Executive Committee (EC) in smaller clubs, is to execute strategy mandated by the Board of Directors, through the management of club operations and programs/activities therein. If an ED exists, clubs should not have an EC (which effectively duplicates and conflicts with the authority and responsibilities of the ED). The ED/EC is responsible for all operational affairs of the club, including its technical operations indirectly through the club's Head Coach or Technical Director. The EC/ED should be the sole report to the Board of Directors regarding all club operations. The EC/ED acts as the main conduit between strategic matters at Board level and operational matters at staff/volunteer level. As such, the ED/EC acts as the convertor of planned strategy and targeted goals from the Board of Directors into programmed actions and executed outcomes from staff/volunteers.

Specifically, the Executive Director or Executive Committee should be responsible for:

- ▶ Oversight of the design and implementation of all club programs, campaigns, and other consumer-directed activities
- ▶ Reporting to the Board of Directors as required to support their decision-making and overall stewardship of the club
- ▶ Management of all club staff (either directly or indirectly), both administrative and technical/coaching
- ▶ Implementation of and adherence to all club policies (approved by the Board of Directors)
- ▶ Full responsibility for the day-to-day financial affairs of the club, including the full financial accounting function, cash management and banking, financial reporting, budgeting, and financial forecasting
- ▶ The development of organizational partnerships as required to execute strategy and implement programs (including relationships with soccer facility owners, corporate sponsors and suppliers)

Role of the Technical Director / Head Coach

The role of the Technical Director (or Head Coach in smaller clubs) is to lead the overall soccer development of the club's players and coaches. The Technical Director or Head Coach should report to the Executive Director or Executive Committee on a day-to-day basis, but attend meetings of the Board of Directors at its pleasure. The Technical Director or Head Coach should ideally not directly coach players or teams, but instead focus on putting in place a framework and plan through which all of the club's coaches (staff or volunteer) can coach and develop the club's player base collectively. This should include strategies for the development of the club's coaching faculty (paid or volunteer). The Technical Director should also have chief responsibility for high-level communication to the club's customer base with regard to program goals, benefits and specifics, as they pertain to the club's overall technical strategy.

Specifically, the Technical Director or Head Coach should be responsible for:

- ▶ The design of the club's Technical Development Plan
- ▶ The design and oversight of all programs and soccer activities that execute the Technical Development Plan
- ▶ The design of the club's Coach Development Plan
- ▶ The design and oversight of all coach education and development activities that execute the Coach Development Plan
- ▶ The recruitment of all club coaches, and the assignment of coaching responsibilities therein
- ▶ Assessment, appraisal and due performance management (including dismissal if necessary) of all club coaches
- ▶ Development and management of all sport science / sport medicine partners and suppliers
- ▶ Management of accurate implementation of the club's annual technical budget (and contribution to its development for the proceeding year)

²This position may be called the General Manager, Chief Executive or Chief Administrative Officer. For the purposes of this document, it will be referred to as the Executive Director.

- ▶ Technical reporting to the Executive Director or Executive Committee
- ▶ Attendance at and presentation to the Board of Directors on technical strategic matters as requested

- ▶ Implementation of and adherence to all club technical policies
- ▶ External representation of the club in all technical matters

PLANNING & POLICIES

Planning

Strong clubs exercise good governance by using planning to drive the overall direction of the club, and a robust policy framework to control its activities.

Every soccer club should have planning of some sort in place, upon which its programs and activities are based. Contrary to popular belief, the need to plan is as pertinent in very small clubs as it is in large clubs with multiple staff and hundreds of volunteers.

The level of scope, detail, and sophistication in your club's planning activities can vary based on the complexity of your activities and stakeholder base. However, at a minimum, every club should have basic **operational planning** that lays out programming activities, campaigns and operational commitments every year to match their annual budget.

Clubs involved in youth soccer should also have **technical development plan** of some sort, which outlines the pathway

through which youth players are developed in their prescribed programs. This plan should be supported by a strategy to develop the club's coaches, which should be robust in large clubs that have dozens or even hundreds of volunteer coaches.

Larger clubs should have longer term **strategic plans**, that have high level targets and goals to be achieved over a number of years. These clubs' annual operational plans and technical plans should be geared to achieve the longer term strategic goals that are in the strategic plan.

Decisions made by clubs to engage in activities should be driven by what is laid out in their planning. This is important to ensure clubs do not over-commit to many activities with limited capacity, rendering them ineffective at delivering anything of substance. It also helps clubs proactively explain to their stakeholders (particularly customers) why the club is engaging in certain activities and not others. The best soccer clubs use their planning as a core communications manifesto, as well as a guiding beacon for operational decision-making.

STRATEGIC PLAN

- ▶ 3-5 years
- ▶ How many players do you plan to have enrolled?
- ▶ How many youth players will have achieved scholarship offers?
- ▶ How many coaches will you have qualified?
- ▶ What facilities will you have developed or have access to?
- ▶ What fundraising or corporate sponsorship targets will you have reached?
- ▶ What on-field success will you have achieved?

OPERATIONAL PLAN

- ▶ Annual, one year
- ▶ What soccer programs are you going to run?
- ▶ What coach development clinics and workshops are you going to run?
- ▶ What community events are you going to participate in?
- ▶ What lobbying or advocacy work are you going to engage in?
- ▶ What marketing and promotional campaigns are you going to launch?
- ▶ What projects to improve your club's operations are you going to engage in?

TECHNICAL PLAN

- ▶ No term, ongoing
- ▶ What strategic goals does your technical plan aim to move?
- ▶ What are the guiding principles that inform your plan?
- ▶ What is your pathway to develop players?
- ▶ What soccer programs execute your player development pathway? (no detail!)
- ▶ What is your strategy to develop your coaches?
- ▶ What competition type do you support your teams/players participating in?

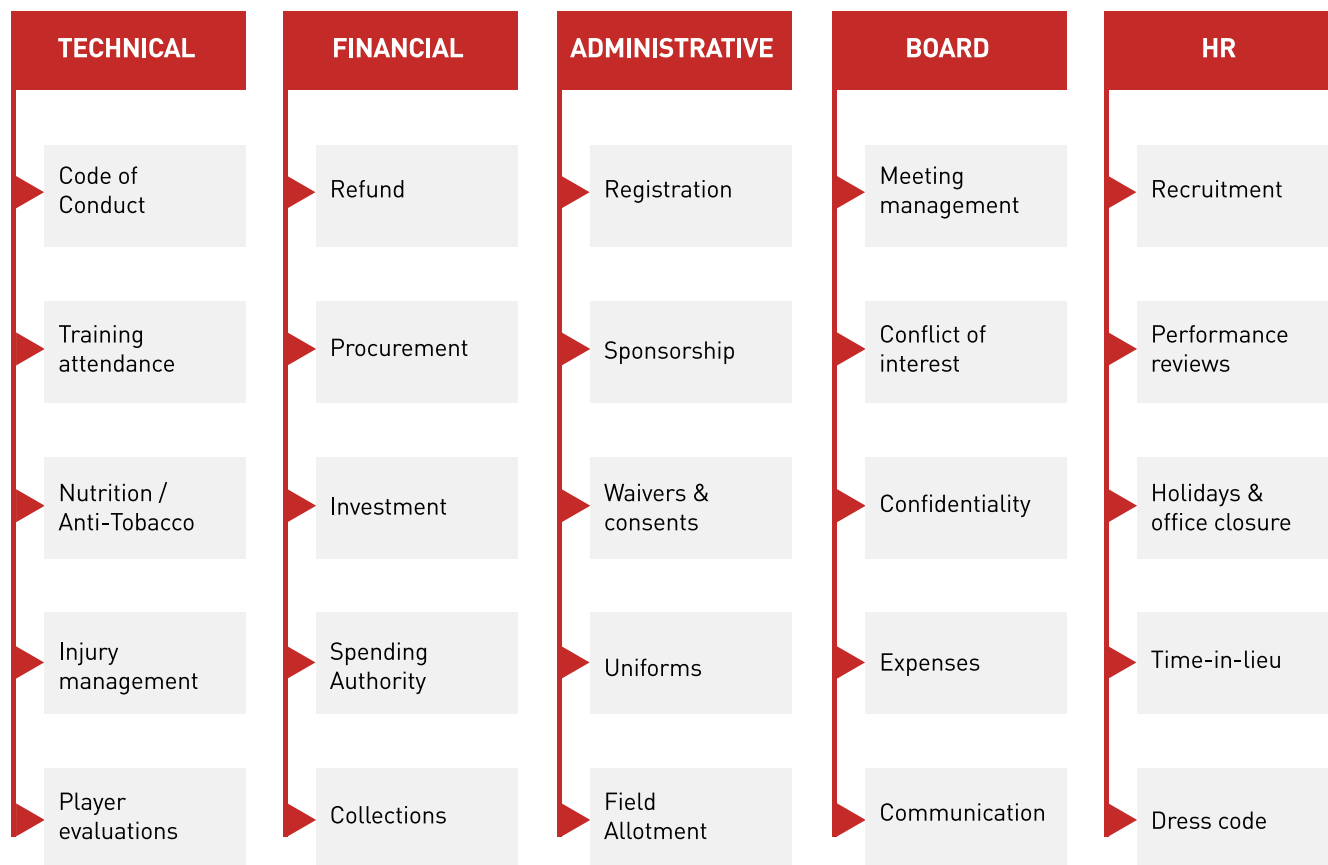
Policies

A policy is defined as a collectively agreed position on a certain matter. Policies are important as they are a way for a club's Board of Directors to pre-emptively make decisions on a variety of routine matters without having to repeatedly convene a Board meeting. Through a framework of policies that stretch across all aspects of a club's affairs, Boards can direct staff and volunteers on how decisions should be made, thus delegating actual day-to-day decision-making out of the Boardroom.

Any club, large or small, should have policies that dictate action on broad, common issues and activities that it encounters in the course of running its operations. Policies should outline your club's position with respect to certain issues, but not describe how actions should be taken to execute policy. These are 'procedures' and commonly get confused with policies.

When setting your policy framework, keep it clear, concise, simple and targeting issues or areas where decision-making is routinely and commonly needed. Ensure your policies are not actually procedures describing how to undertake actions and remove them if so. Also note that policies do not have to be drafted by the Board of Directors, but should be approved by the Board of Directors as the chief steward of the club. Deviation from policy should only be permitted by the Board of Directors.

Your policy framework is yours to design, based on the issues you find your Board of Directors commonly having to deal with, or your ED/EC repeatedly asking for decisions on. Your policy framework should be fluid, and under constant review by the Governance Committee of your Board of Directors as your club changes; over time, old policies will become obsolete and the need for new policies will arise. But as a guide, your club should have policy in the following areas:



EVALUATION & REPORTING

Strong clubs have the ability to evaluate their performance (and that of their programs) and properly report to their Board of Directors and stakeholders. Evaluation and reporting consumes resources (particularly of leadership personnel). But it is essential to run effective soccer operations and arm a club's Board of Directors with the information it needs to effectively govern the club. Accordingly, clubs should aim to have some sort of evaluation and reporting system in place that uses defined performance measures³ to assess club and program performance.

Your evaluation program should have a number of performance measures identified that you routinely measure that indicate quality in your programs and also show your progress towards meeting the goals you have set in your plans outlined above (strategic, operational or technical). You do not necessarily need many performance measures, nor do they need to be complex. But they should be relatively simple to measure and consistently measured so you can gather longitudinal data that shows trends over time (ie. your club and programs are growing and improving, or contracting and deteriorating). Your KPIs⁴ should be wholly linked to broader targets and goals you have identified and committed to in your planning.

Evaluation techniques can be as simple as a quick satisfaction survey with program users, or more in depth focus group discussions, or the gathering of hard data such as player performance data, financial data, or empirical volumes (eg players, coaches). But ensure you are clear on what you are doing to gather the evaluation data you need, and have a plan as to how and when you will gather it routinely, year after year.

The results of your evaluation program should form the basis of reporting to both your Board of Directors and your broader stakeholder base. Reporting is essential for a club of any size and will likely be required in some form by your stakeholders, in particular your members, your governing body, and any government agencies you may receive funding or field use from. Typically, your club should exhibit the following reporting:

Annual Club Report

This report is issued annually at a club's Annual General Meeting (AGM) and gives an overview of the achievements of the club over the past year. It should include clear, measured progress towards the club's identified planning goals and also give a review of the club's financial position. The report should also include an address from the club President, outlining the club's desired future direction and targeted outcomes and activities.

Financial Reports

Financial reports should be developed at a minimum at the end of a club's financial year. Annual financial statements

must be presented at your club's Annual General Meeting and may need to be audited by an external auditor, depending on the requirements of your province's governing legislation and your provincial/territorial soccer governing body's policy requirements. In larger clubs, financial reporting should extend beyond mandatory annual requirements and be issued to the Board of Directors on a quarterly or even monthly basis. Financial reporting should include at a minimum three core financial statements — an **Income Statement** (or Statement of Operations), a **Balance Sheet** (or Statement of Financial Position), and a **Cash Flow Statement** (or Statement of Cash Flows). These statements should be prepared by a qualified accountant and be accompanied with some analysis or commentary by the club Treasurer or Executive Director / General Manager if your club has one. Your club should also present an annual budget of revenue and expenditure, which should be formally approved by the Board of Directors. Presentation of interim Income Statements to the Board of Directors should include year-to-date costs and revenues compared with budgeted sums for the year.

Management Reports

Management reports should be issued to the Board of Directors in advance of its standard Board meetings (which are commonly monthly, but can be bi-monthly or even quarterly). Management reports should include updated progress towards implementation of the club's annual operational plan (and, by extension, its strategic plan if it has one). They should also report on any other performance measures that the Board requires to properly evaluate club performance. Management reporting should also include written updates on any matters that are pertinent to the oversight of risk at the club, or are noteworthy for the immediate future (particularly the period between then and the next scheduled Board meeting). Management reports should not be an ambiguous narrative about what has been happening at the club since the last meeting; reports should be to-the-point and consistent in layout and content.

Technical Reports

Technical reporting should be developed in tandem with the club's management reporting. In larger clubs, technical reports may not be sent directly to the Board of Directors, but instead enshrined in management reports issued by the Executive Director. As with management reports, technical reports should focus purely on the execution of identified technical goals and targets. Such items may include progress in technical program development, performance goals in relation to players, teams and coaches, or growth in technical capacity (if outlined as a goal in the club's broader planning). Technical planning may include some commentary from the Technical Director/Head Coach with respect to technical program execution, program planning for the future, and budget management.

³ Performance measures are defined as the criteria you choose to use to evaluate something. eg. customer satisfaction, enrolment numbers, match results.

⁴ A KPI (or Key Performance Indicator) is a specific target you set on that performance measure that indicates success or quality. eg. 8/10 customer satisfaction, 200 players enrolled in a program, reaching the semi-final of a designated tournament.

FINANCIAL

All clubs, large or small, have an obligation to prudently manage their financial affairs, to ensure they are sustainable going concerns. This means ensuring proper accounting and financial management practices are in place to duly manage financial transactional volume. It also means that financial decisions are made that properly safeguard the club's assets and do not place the club under undue levels of risk.

Working Capital Management

For most clubs that do not own facilities or have significant capital items on their Balance Sheet, financial management is an exercise in good working capital management. Working capital is the cost and revenue a club consumes and generates running its day-to-day operations. This largely relates to soccer program management. To that end, all clubs should have the practices in place to manage the process of revenue coming in from program fees and other cash flow generating activities, and going out to pay costs related to the provision of these programs and activities. In this process, clubs should exhibit rigorous processes in the following:

- ▶ Accounts payable (cheque drawing, payment authorization, accounts posting)
- ▶ Accounts receivable (payment methods (credit, cheque, cash), collections, refunds, accounts posting)
- ▶ Cash management (including credit cards, banking function, overdraft/short term credit facility, petty cash, etc)

Financial Health Indicators

Clubs should measure and oversee a number of Income Statement and Balance Sheet indicators that show the quality of their financial health. These indicators should be routinely measured when financial accounts are produced, duly reported to the Board (as part of standard financial reporting) and actively analysed by the club's Board of Directors. Some indicators may be more important than others depending of the predicament of any given club⁵. However, the following financial indicators should be actively monitored by clubs:

- 1. Net Assets (total assets — total liabilities)**
Net assets indicate a club's solvency, which is its long term ability to pay its debts. It is a core indicator of financial health. All clubs should maintain a state of solvency at the very least, whereby they exhibit positive net assets.
- 2. Debt Ratio (total liabilities / total assets):**
Debt Ratio is a solvency ratio that measures an organization's total liabilities as a percentage of its total assets. This demonstrates an organization's ability to pay off its liabilities with its assets, if required to do so. Organizations with high debt ratios are

said to be highly leveraged. The higher the ratio, the greater risk will be associated with the organization's operations. Organizations should have a debt ratio of less than 0.5, meaning that most of the organization's assets are financed through equity as opposed to debt.

- 3. Current Ratio (current assets / current liabilities)**

Current ratio is another very important financial indicator as it measures the health of a club's working capital, which is the fuel that fires its programs and soccer activities. Clubs should maintain a current ratio of 1 or higher (ideally 2). A ratio lower than 1 means the club cannot pay its immediate bills at once, if required to do so.

- 4. Operating Reserve (total expendable assets⁶ / total monthly expenses)**

Operating reserve measures the protection a club has built to manage its costs and continue to operate in the event of loss of revenues. It expresses costs in terms of the risk they present to a club relative to its ability to cover them. To that end, it is a measure of risk in both cost and reserve protection. Clubs should aim to have an operating reserve of at least 25 per cent to ensure three months of basic cash flow protection.

- 5. Average Earnings (five-year aggregate surplus (or deficit) / 5)**

Average earnings illustrates the financial sustainability of a club by examining its surpluses and/or deficits over a five year period, rather than in isolated financial years. This mitigates annual volatility in financial performance and gives evidence of strong overall financial management and a club's longer term financial viability.

- 6. Revenue Mix Ratio (fee-based revenue : corporate sponsorship revenue : grant & donor-based revenue)**

Revenue mix ratio breaks revenue lines into three categories, each of which have different levels of risk associated with them. Fee-based revenue accounts for all revenues generated from the fees charged by the club's programs. Corporate sponsorship accounts for all revenue that can be recognized from material sponsorship agreements. Grant and donor-based revenue accounts for club-designated revenues generated from government grants or contributions and donor-based fundraising activities. Clubs should aim to have a revenue mix ratio of 7:2:1, which represents least risk. A high fee-based revenue ratio indicates a sustainable revenue model, as the club's programs are sustaining themselves financially from the value they create. A high grants & donor-based revenue ratio indicates revenue risk, as the club is dependent on revenues that are not generated by its

⁵ eg. a club that has financed the building of a soccer facility with debt capital will need to monitor its debt ratio more actively than a club that has no long term loans and only short term credit card debt.

⁶ Defined as assets a club can access and liquidate relatively quickly. It is commonly defined as Total Assets minus Fixed Assets and Restricted Net Assets.

programs, and are effectively outside of its control. Clubs should maintain revenue mix ratio that presents fee-based revenues at a minimum 50 per cent of total revenue mix.

7. Staff Productivity Ratio (total revenue/total staff payroll)

Staff productivity ratio indicates the extent to which staff are generating gross revenue, such that their addition is adding financial value to the club, not consuming it. This is an important measure of long term sustainability in a club, and of the effectiveness of core overhead. Clubs should not have a staff productivity ratio under 2, with a ratio of 4–6 being ideal.

8. Technical Cost Margin (total coaching⁷ expense / total expenses)

Technical cost margin indicates the portion of expenditure which is being assigned to technical, coaching-related soccer activities, as opposed to program management or administrative functions of a club. A high technical margin indicates a club's high commitment to player and coach development activities. Clubs in more advanced Club Licence categorization should have higher technical margins, aligned to higher player and coach development responsibilities.

HUMAN RESOURCE MANAGEMENT

Staff Structure

Many clubs operate purely through volunteer personnel. But increasingly, clubs are hiring staff positions in both administrative and technical roles. The volume, structure and nature of your staff will depend on the size of your club, the scope of its operations, and the capability it needs to fulfill its goals now, and into the future. Staff should be added incrementally, and based on the value they bring that will result either directly or indirectly in revenue into the club to at least cover the cost of their investment.

Many traditional amateur soccer clubs with less than 500 players can operate purely on volunteer manpower. However, any club should start by hiring part-time administrative program support to the club's volunteer base as soon as it is financially-viable to do so. Academy-style clubs should all have basic administrative support and professional technical leadership to provide the more sophisticated coaching and development programs they target.

A club Head Coach is usually a club's first management appointment and is a prudent early addition as they are

instrumental in the design and development of the club's core fee-generating programs. As clubs grow in size, staff roles should become more specialized and departmentally structured. Clubs should avoid simply adding more generalist administrators that work alongside each other with ambiguous job descriptions and reporting lines or limited technical business skills.

Important functions that should be covered by medium or large sized clubs are finance and marketing/communications. Larger clubs should also recognize the importance of building a mid-management structure and should avoid creating a flat structure where all positions report to the Executive Director.

There is no set way to build your club's staff structure, but staff growth should be tracked against player registration as a proxy for program growth/proliferation and supporting revenue lines. The charts below do not include the many part-time coaching positions that may be appointed to run programs (particularly higher-level development programs), but instead focus on staff roles that are commonly added to a club's full-time or part-time payroll bill.

STAFF ORGANIZATIONAL CHART CLUB WITH < 500 PLAYERS

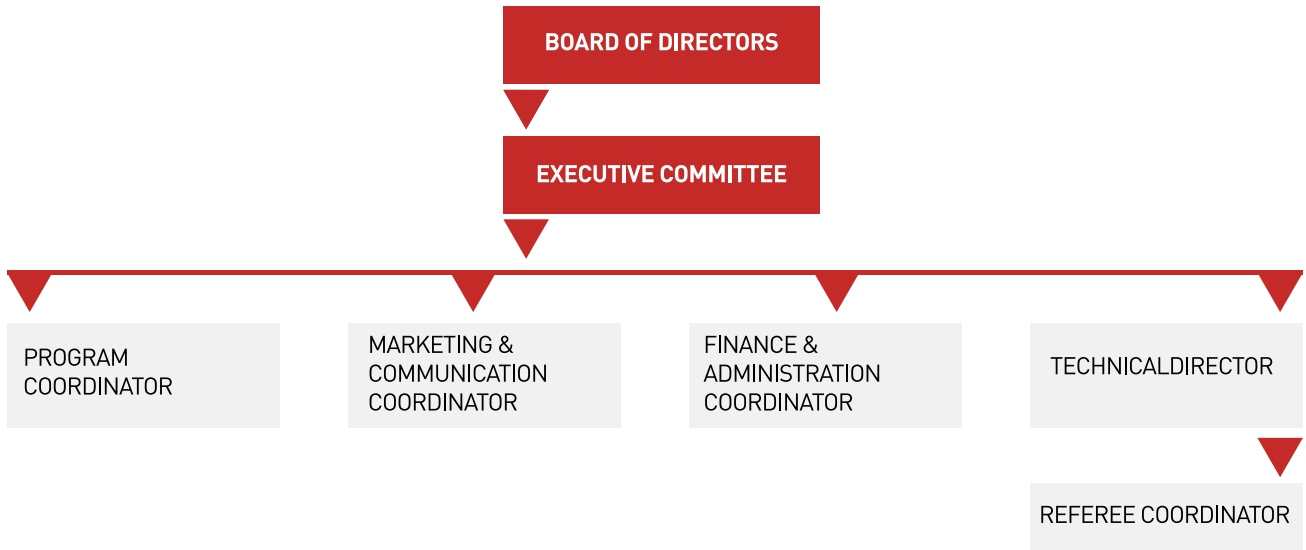


STAFF ORGANIZATIONAL CHART CLUB WITH 500 – 1,000 PLAYERS

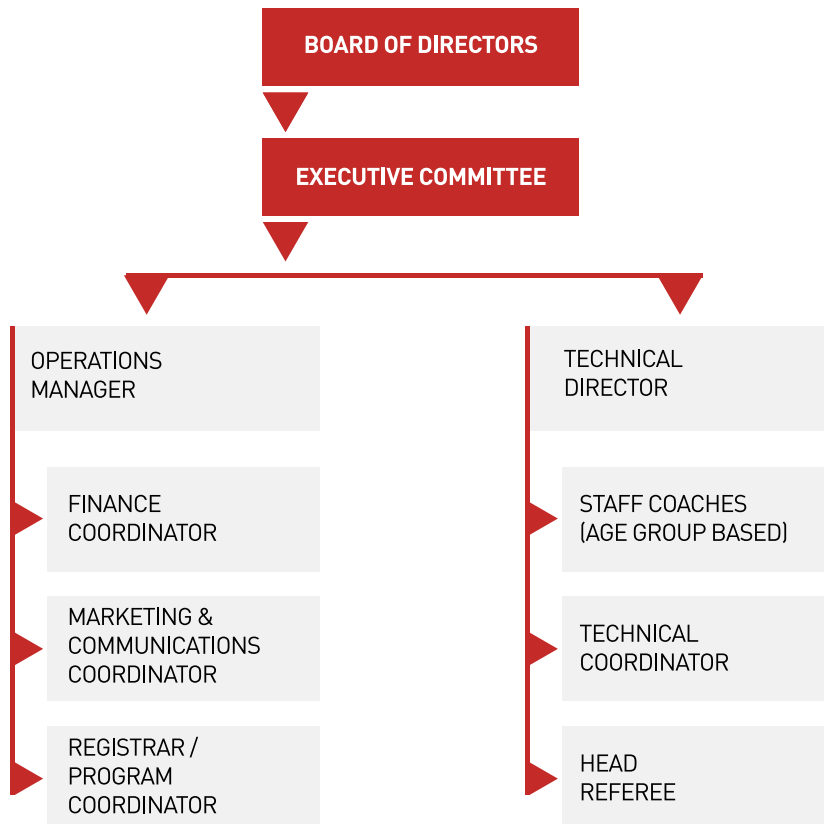


⁷Coaching expense is taken to include total coaching payroll, coach education costs and coaching support services costs (eg. sport science / sport medicine).

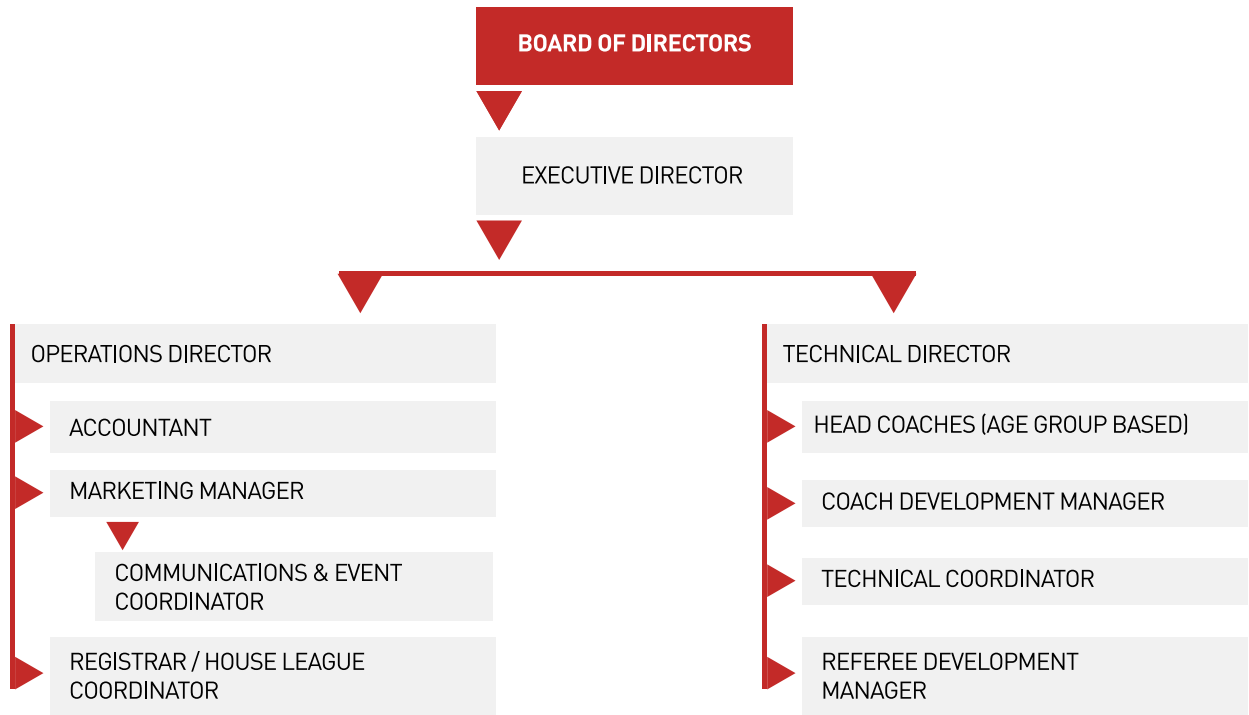
**STAFF ORGANIZATIONAL CHART
CLUB WITH 1,000 – 2,000 PLAYERS**



**STAFF ORGANIZATIONAL CHART
CLUB WITH 2,000 – 3,000 PLAYERS**



**STAFF ORGANIZATIONAL CHART
CLUB WITH 3,000 – 5,000 PLAYERS**



**STAFF ORGANIZATIONAL CHART
CLUB WITH + 5,000 PLAYERS**



Human Resource Policy

Clubs with any staff on their payroll should have policy related to staff management compiled in a manual that is made available to all staff members on joining the club. This HR policy manual should lay out important policies that relate to the expectations and standards required of staff and club (as an employer) that should be read, understood and adhered to by both staff and club. Clubs should be vigilant about the provision and maintenance of their HR policy manual, as the employment of staff opens it up to legal requirements that can create significant legal risk if not managed through the due diligence a robust HR policy manual provides. Fundamentally, a HR policy manual should outline the following:

▶ **Employee responsibilities and behavioural standards**

These policies should outline what is expected of staff and are important as a basis for potential discipline or dismissal of staff that may be warranted. They should be linked closely to a club's organizational values and cover such areas as attendance, employee expenses, restriction of other employment & activities, public representation of the organization, social media use, copyrights, patents & trademarks, code of ethics, club dress code, office tidiness and tobacco use.

▶ **Hiring policies and employment procedures**

These policies should outline how staff are hired (eg. does the club use advertised recruitment, internal promotion, targeted search, etc and if so, under what circumstances?) They also outline who is involved in the hiring process (including who ultimately makes the hiring decision) and cover the basis upon which staff are hired (ie. what skills are sought, what characteristics must be exhibited, etc).

▶ **Employment agreements**

These policies outline the core components of a club's employment agreement, covering the nature of the employment (full-time, part-time, contract, etc), any probationary period required, compensation & benefits agreed to, a full statement of duties, detail on performance & salary reviews, policy on overtime & time-in-lieu and policy regarding termination of employment.

▶ **Leave**

These policies outline the different types of leave that employees are entitled to, or a club may choose to offer an employee. Base levels of leave are included in provincial employment legislation, but it is a good idea to have them included in an HR policy manual, especially if a club is providing over and above what is legally required. Policies should cover vacation leave (with pay and/or without pay), sick leave, maternity/paternal leave, bereavement leave and Court leave (jury duty).

▶ **Training and development**

Clubs should have policy outlining any commitment they may choose to make to employee training and development, including how any professional development allowance may be used, and for what purpose.

▶ **Performance management**

Clubs should outline the process by which employee performance is reviewed and appraised. This should include detail on what employee performance measures are assessed, what opportunity employees have for feedback or self-evaluation, and how salary reviews are conducted vis-a-vis performance assessment.

Volunteer Support

Not-for-profit clubs that engage volunteers to undertake activities on the club's behalf should where possible provide structured support for their volunteer groups. Many volunteers in not-for-profit soccer clubs are volunteer coaches, who should be supported and developed through a club's technical department as part of its coach development plan. Where possible, clubs should provide the following support measures for their volunteer personnel:

- ▶ Defined descriptions of volunteer roles
- ▶ Basic induction training for volunteers (including outlining of pertinent club policies)
- ▶ Procedural manuals or guides for volunteer positions
- ▶ Volunteer satisfaction / feedback surveying
- ▶ Volunteer appreciation measures (recognition and awards events, designated club privileges (such as program discounts, voting rights or a greater 'say' in the club) or just a simple 'thank you' from staff or the Board of Directors)

RISK MANAGEMENT

Management of risk is one of the most important aspects of modern organizational management. Being a soccer club (whether you are large or small, or private or not-for-profit) does not exempt you from this reality. In fact, being involved in an industry where the programs you offer involve exposing your customers to potential injury, and where many of them are children (ie. highly vulnerable), makes risk management an even higher priority for strong, responsible clubs.

Risk management sounds complicated, but it doesn't have to be. And not being familiar with it is no excuse for ignoring it. All soccer clubs should have a defined place in their organizational structure for managing risk. If undefined, it is a de facto responsibility for the Board of Directors, and overall accountability for it always lies here. But soccer clubs that have more advanced operations and program skews should assign responsibility for risk either to their Finance & Audit Committee, or create a separate Risk Management Committee altogether. Large clubs, particularly those that operate facilities (especially indoor facilities) should have risk management clearly defined in executive job responsibilities for the Executive Director and appropriate staff subordinates (such as a Facilities or Operations Manager).

Risk Assessment

In managing risk, clubs should undertake a basic risk assessment exercise that identifies what the club sees as

its main risks, what the likelihood of those risks coming to fruition are, and what the consequences would be if this occurred. Clubs should examine risk in the following areas:

- 1. financial/credit risk** — risks related to the financial well-being of your club, including areas where the club feels organizations/individuals who have financial obligations to the club may not fulfill them.
- 2. program risk** — risks related to the successful development and execution of the club's programs. This may include items such as competing programs, weather disruption, coach availability or insufficient enrolment.
- 3. operational risk** — risks related to the smooth running of your club's business operations. This includes items such as IT/data risk, staffing risk, child protection and building/facilities risk.

Following a basic risk assessment, clubs should prioritize these risks in terms of their likelihood and impact of occurrence. Clubs should also examine how these risk may inter-relate (ie. how does one risk coming to fruition impact the likelihood of other risks coming to pass, or their severity of other risk.)

FINANCIAL / CREDIT

- ▶ Can your organization pay its bills as they fall due?
- ▶ Is your organization carrying a lot of debt that is going to be difficult to pay off?
- ▶ Does your organization have debtors who are unlikely to pay you?
- ▶ Do you have key areas of revenue that are in decline?

PROGRAM

- ▶ Do you have the field space to match the demand for your programs?
- ▶ Do you have access to the match officials you need to run your programs?
- ▶ How large is the core of participants you need in your program to make it viable? Can you meet it?
- ▶ Do you have enough qualified coaches to run your program properly?

OPERATIONAL

- ▶ Is your organization too reliant on a staff member who 'knows everything'?
- ▶ If your computer crashes or is damaged, what happens to the information housed on it? Is it backed up and secure?
- ▶ What happens if staff or volunteers aren't properly trained or vetted?
- ▶ Can your organization provide the reporting and business information the Board of Directors needs to make good decisions?

Risk Mitigation

Once clubs have undertaken a basic risk assessment, clubs should then devise strategies through which to manage these risks, such that the likelihood of them coming to fruition is lessened. This process of risk mitigation should be led through the executive function of the club (ie. the Executive Director or Executive Committee), and presented to the group that governs risk in the club (either the Board of Directors or sub-committee therein to whom this responsibility has been assigned). On approval by the Board of Directors, risk mitigation strategies should be enshrined in standard operating procedures, program design and business practices across the club. Strategies should include:

- ▶ methods to proactively lessen the possibility of risks coming to fruition (eg. data back-up to protect against IT server failure, parent education programs to reduce sideline abuse during games, etc)
- ▶ methods to reactively manage the impact of risks, if/when they come to fruition (eg. development of a 'plan B' step-down program in the event low enrollment renders another program unviable.)

INFORMATION SYSTEMS

Well-functioning clubs should have information technology systems that can adequately manage the scope and complexity of their operations. Moreover, progressive clubs should be constantly looking for ways to leverage new technologies to enhance customer experience, streamline workflow and manage data securely and effectively.

Small clubs can be managed on relatively simple and inexpensive IT systems that can ostensibly be housed on a single computer, with various readily-available off-the-shelf software programs. Large clubs should have more complex IT solutions to operations management, which should achieve enterprise-wide automation of core business functions - finance, scheduling, registrations, business operations and referee assignment. Best practice also sees application of technology to clubs' coach development function and advanced development programs, as well as more sophisticated use of IT in marketing, communications and CRM.

Specifically, clubs should leverage technology to drive improvements in the following operational areas:

Registration & Customer/ Contact Data Management

Clubs should invest in software (which is readily available) to manage registration of participants in programs online. Software offerings should also manage data accrued therein, ensuring adherence to security and privacy requirements. Clubs must ensure their technology partners can provide this degree of indemnity.

Financial Management Systems

All clubs should maintain IT-based records of their financial statements and affairs. This can be easily achieved through

Crisis/Emergency Response Planning

Part of a club's plans to manage risks after they have come to fruition should include some element of crisis or emergency response planning. These plans should be built specifically around the risks a club has identified that may have a severe impact, particularly those that have a higher likelihood of occurrence. Crisis/emergency management plans should importantly cover the following:

1. Identification of the individuals, agents or groups who will be responsible for crisis/emergency response management, including those who can represent the club in terms of communication
2. Specific responses for each potential crisis/emergency, and their prioritization, including the appropriate involvement of third parties such as local government emergency services.
3. The process for returning to normal operations after the crisis/emergency has been dealt with.

investment in off-the-shelf software packages, that range from simple programs for small businesses to more advanced software for larger clubs. Financial management systems should have the capability to generate financial statements outlined above, as well as manage the cash management and accounts clerical components of a club's finance function.

Scheduling Systems

Recording of scheduling of tournament, league or other competition fixtures (games) that a club runs should be managed by some sort of IT-based system, such that it can be accessed, shared or amended as appropriate by parties remotely. For small clubs with single program focus, this can be as simple as an Excel spreadsheet, but larger clubs should invest in bespoke scheduling software that may be either standalone systems, part of broader competition management software, or part of sport-specific enterprise-wide software platforms.

Business Connectivity

Aside from function-specific technology application, clubs should aim to leverage technology where possible to enhance the connectivity of their operations and drive productivity and workflow efficiency. This speaks to the leveraging of mobile technology to connect coaching staff, referee reporting capability and customer responsiveness. It also includes the fundamental business needs of clubs' staff, ranging from email provision/access, computer provision with networked/connected capability, centralization of data with appropriate levels of access and authorization, and website/social media operations.

COMMUNICATIONS, MARKETING & CRM

In what is primarily a pay-to-play system, marketing and communications is as important in the Canadian club soccer system as is the development of programs. All clubs should have some semblance of marketing and communications through which they can present the value of their program offerings and program specifics to potential or existing users.

Clubs that do not have staff should write marketing and communications responsibilities into the terms of reference for their Executive Committee. If staff exist, these responsibilities must form an essential component of their responsibilities. Larger clubs should have defined marketing/communications positions, filled by appropriately qualified personnel.

Marketing Strategy

Clubs should employ good marketing and communications practice that extends beyond simple program promotion to a deeper understanding of target customer bases, their wants and needs, and their satisfaction with club's programs in this context.

Clubs should have a defined, written strategy that defines their marketing focus and explains the deployment of marketing and communications resources. The degree of sophistication and complexity of these plans should vary depending on the size of the club, the skew of its programs, and the volume of its audience. Importantly, a marketing strategy should move beyond basic promotional tactics and speak to the core components of marketing, in particular market segment identification, marketing mix and post-program evaluation. Marketing strategies should contain the following:

► Market Analysis & Segmentation

Clubs should undertake core analysis of their market (people or organizations they have a desire to sell products or services to). This analysis should include:

- examination of their current customers, in terms of what they want and need from soccer (or sport) organizations
- examination of neighbouring soccer clubs or other sport operators to see what they offer, at what price, and how successful they are in attracting customers
- what rules, regulations and policies are in place from government, governing bodies or other impactful organizations that restrict or impact how a club can operate in your market
- what capabilities and limitations the club has that may impact on its ability to provide programs, or make them accessible to its market
- what partners (existing or potential) can be identified to drive the value of the club

► Program/Product Marketing

Clubs should examine their programs with respect to how they fulfill the wants and needs of their customers, and how they move to make their customers aware of these programs, and accessible to enrol and participate in. This should include:

- identification of the core benefits of each program offered
- identification of program pricing that fully captures the value offered by the program
- creation of price promotions that will boost enrolment (such as early registration discounts, multiple booking discounts, etc)
- development of promotional material (to be issued online or offline) that clearly outlines the benefits of enrolment and entices target customers to participate

► Marketing & Communications Channel Identification

Clubs should identify the marketing and communications channels through which their programs can be promoted. A marketing channel is a means through which information about a program can be delivered to the target audience who needs it. It includes the use of a club's website, traditional advertising methods (including local community media outlets), direct marketing technique such as email, direct mail and flyer mail-drops and the many emerging marketing methods that are becoming available through the Internet. Clubs should identify specific channels to employ that match the profile of their target customer group, so they receive information about programs that are specifically of genuine need to them.

► Structured Customer Satisfaction Research & Analysis

On completion of any program, clubs should undertake outreach to the customers who have participated in them to establish:

- overall program satisfaction levels
- where the program worked, and what went right
- where the program did not work, and what may need to be changed for the future
- performance of coaches, staff, match officials and other personnel from the club involved in program delivery
- what potential exists for re-enrollment if the program is run again
- what new programs may be needed, based on the customer demands revealed

This work should not be managed as 'one off' projects, delivered in isolation, but a standard component of the delivery of all programs that is enshrined in normal club practice. Research techniques can vary based on the complexity of information the club requires. This may include town hall meetings or in-person focus groups. However, simple online surveying techniques are most common and are very effective in a consumer culture that is becoming increasingly digitized.

Customer Service Standards

Following on from the need for routine, structured gathering of customer opinion, clubs should set standards for the fulfilment of customer service, and make these standards known to their customer base. Poor customer service is one of the most common complaints that users of amateur soccer programs have of their clubs. However, this criticism is not always reasonable. Clubs are often benchmarked by their customers against large commercial consumer-based companies that have substantial customer service capabilities. The fact is most amateur soccer clubs do not have the ability to provide customer service standards on this level, and provide programs at the low price that their customers routinely expect. To that end, it is incumbent on clubs to educate their customers on what level of service and support they can reasonably expect, and then deliver within those parameters. eg. clubs should clearly advise if their office is closed certain days of the week, or periods of the calendar year, and advise what window of time customers can expect queries to be answered. Examples of customer service measures that can be used are:

- ▶ Overall customer satisfaction ratings (%)
- ▶ Complaint incidence (number of complaints per week/month)
- ▶ Query response time
- ▶ Web content update incidence

FACILITIES

Soccer Facilities

All clubs need access to soccer facilities through which to run their programs. Clubs' ability to gain access to the facilities they need, manage their cost and lobby future facility development is essential to their long term well-being. As such, facilities management is a core component of any club's basic operations that must be taken seriously.

Small clubs may have a simple facilities management function, whereby local soccer facilities are rented (or 'permitted') from local facilities owners (usually local municipal government, school authorities or local college/university institutions). Some clubs may have relationships with private facilities owners, in which a bespoke access/usage agreement should be struck between the facility user (the club) and the facility holder. Some clubs (particularly large ones) may enter into partnerships to develop and operate soccer facilities (particularly indoor facilities), whereby the club actively manages the full operations of the facility, rather than simply renting it for soccer purposes.

General Soccer Field or Gym Usage

Any field usage should be managed through a proper system of defined permitting of field/gym use, for a clearly

Information with which to assess these measures should be routinely gathered as part of the customer feedback clubs should be gathering to assess program effectiveness (as outlined above).

Program Quality Standards

Similar to the development of customer service standards, clubs should set core standards of excellence they require in their programs, that define their quality (or otherwise). These standards should include base level customer satisfaction levels, but also other measures that show that the program is doing what it is supposed to, such that it can be called 'high quality'. Such measures may include:

- ▶ Player advancement data (measuring player development quality)
- ▶ Player retention rates (measuring participation quality)
- ▶ Match results (measuring team performance quality)
- ▶ Coach qualification incidence (measuring coach development quality)

To undertake this work, clubs must be clear on what the core deliverable of a program is, so they can gear evaluation accordingly. Clubs should also be aware that setting and routinely measuring program quality levels involves the investment of capacity to undertake the surveying and other data collection work, and analysis to assess quality levels.

designated time period and for a defined rental fee. Insurance requirements in relation to facility use (that may occur over and above insurance provided by a club's soccer governing body) should also be appropriately managed by the club. Clubs should train their coaches and volunteers to undertake basic inspection of soccer fields or gyms they have permitted to ensure the safety of their players.

Private Soccer Facility Usage

Any usage of private soccer facilities should be managed through a written access agreement, which lists the name and particulars of the private facility holder, the terms of the facility rental (including scheduled rental time, term (number of weeks), rental rates, and any other requirements or terms required of the club). This agreement should be signed by individuals authorized to bind both parties. Clubs should undertake the necessary due diligence to ensure private facilities that are rented meet basic safety requirements and are of the quality required to match their program standards.

Private Soccer Facility Management

Clubs may choose to enter into partnerships whereby they fund the development of a new facility, and are responsible

for its full operations beyond the soccer programs they may run there. Such partnerships are becoming increasingly common between municipalities and soccer clubs in the leasing of indoor facilities or higher cost outdoor turf fields. They create 'win-wins' for both parties in that the club gains full control of a premium facility that they need to create year-round programs to match consumer demand, while the municipality transfers the financial risk of facility management to a local community partner (the club) who can ensure its optimal usage by local municipal taxpayers. Private facility management partnerships should be entered into with extreme caution, given the substantial financial risk the club will be taking on when committing to the long term financial obligations needed to finance such an operation. Clubs who enter into such arrangements should at a minimum engage in the following work:

1. Feasibility Study & Due Diligence

The club should undertake a full study of the proposed facility to understand its feasibility. This should include (but not be limited to) construction costs, environment impact assessment (if required), associated financing costs, required occupancy levels and rental rates, community feedback/consultation and architectural/engineering reports for the proposed facility. The results of this work should produce a detailed financial plan for the development of the facility, and an operating budget for the first five years of its life.

2. Operating Licence Agreement

The club should enter into a detailed Licence agreement that states clearly the terms of ownership and operating authority of the facility, between the club and third party land owner. This agreement should include the length of the Licence term, terms of financing of the facility's construction, where responsibility lies for operating revenue and cost (ie. income statement responsibility), responsibility for capital renewal or other future capital items relating to the facility's maintenance or future expansion, insurance/indemnification and intellectual property rights (eg. naming rights or other sponsorable assets built through the facility).

3. Facilities Management Capability

The club should understand that the fundamental HR requirements of their club will drastically change on the opening of the new facility. In particular, the requirements of the club to manage and operate the facility (as opposed to simply use it) will spring the need for new staff and professional facilities management leadership/expertise that it will likely not already have on payroll or on volunteer committees. As such, proper staffing of the facility should be an integral component of the feasibility

study that contemplated its construction, and must be brought on line and properly trained in advance of the facility's opening.

4. Operating Procedures

The club should ensure the proper non-soccer facilities management procedures and risk management strategies are put in place through which to run the facility safely and effectively. This should include safety/evacuation protocol, emergency response management, as well as routine operational procedures including facility scheduling/bookings, cleaning and maintenance and security.

5. Financial Transparency

Finally, the club should ensure that financial management of the facility (ranging from cash management and financial accounting to operational budgeting and capital forecasting) is managed separately to the rest of the club's operations (albeit under the same consolidated Income Statement and Balance Sheet). This is important to ensure members and other facility stakeholders can clearly see the financial performance of the facility, without the 'blurring' of other operating costs and revenues from the club's normal operations. This is particularly important in the initial years of the facility's life, when the risk of it posting operating deficits is higher and its financial sustainability is not yet proven.

Office Facilities

Clubs that grow to the size whereby they require staff should have a bricks-and-mortar office space, not only to provide a place of employment for staff, but through which to manage their growing club operations. This office space should provide the basic requirements staff need to do their jobs (including appropriate heat and air conditioning), and fulfil the requirements of applicable employment law. Aside from appropriately resourced workstations, office space should include:

- ▶ a secure, lockable office in which sensitive and confidential documentation (such as employee details and financial information) can be archived
- ▶ a confidential meeting room, large enough to be used for general staff meetings or meetings with coaches or parent groups
- ▶ a reception space where walk-in customer matters can be managed without disrupting operations

Ideally, clubs should aim to base their administrative office space within (or close to) soccer facilities that they regularly use for their programs (particularly larger indoor facilities).

PARTNERSHIPS

To be effective, clubs should have defined partnership agreements in place with organizations who help them design and deliver quality soccer programs. Where partnerships exist, the terms of the agreement therein should be enshrined in a formal agreement contract, signed by all parties. At minimum, formal agreements should be in writing, with named parties, stating the mutual commitments being made by each party. An agreement must have a stated term (eg. six months), and outline how (if at all) the agreement can be exited ahead of its expiration. Finally, an agreement must be signed by representatives from each party who have authority to bind their respective organizations. For larger, multi-year agreements, considerations for matters such as ownership of intellectual property, privacy/confidentiality, liability/indemnification, warranties and brand usage may also be included. Where possible, formal partnership agreements should be drawn up and reviewed by qualified legal expertise, on behalf of a club.

Specifically, clubs can and should engage in the following partnership types:

Corporate sponsorships

Such agreements exist whereby a corporation of some sort provides benefit to the club (usually in the form of a cash payment or some value-in-kind assets such as equipment, products or complimentary/discounted services) in return for defined marketing benefits that provide exposure in some way to the club's stakeholder base (usually its players and their reference groups). Corporate sponsorships can range from large, multi-year agreements with large corporations, through to simple agreements between small clubs and local community businesses.

Supplier agreements

Clubs commonly have significant expenditure in a number of cost areas related to soccer program delivery. Such costs

include uniforms, equipment (balls, cones, goals, flags, etc), field rental (indoor and outdoor) and team travel/accommodation. Larger clubs also spend significant budget sums on sport science/medicine providers, office rental and IT (particularly registration systems). Where agreements with suppliers extend beyond singular transactions, formal agreements should be negotiated and put in place. Moreover, the selection of preferred suppliers for large, multi-year service agreements should be managed transparently through stated procurement policy, which should require either a formal Request-For-Proposal process, or the examination of multiple quotes from a minimum number of potential suppliers.

Inter-club partnerships

Partnerships between neighbouring soccer clubs, where mutual value-add has been identified are encouraged and should also be solidified in a formal agreement where possible. Such partnerships commonly occur between clubs to provide a heightened skew of program offerings to a shared player/customer base that they would not have capacity to offer on their own. Shared facilities use agreements are also commonplace, particularly in rural communities.

Facility licensing partnerships

Facility licensing partnerships have been outlined above and occur when a soccer facility owner leases a facility (in part or whole) to a club under a Licence, granting them permission to fully manage the facility and generate revenue from it for a fee. Such partnerships may cover the initial construction of a soccer facility by the club, in partnership with a land owner. Such agreements are commonly long term in nature (~20 years) and are usually only entered into by large soccer clubs that have significant financial capability and Balance Sheet protection. These arrangements/partnerships have been detailed more extensively earlier in this guide.