

Case Study

Planning for the Future - Why?



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Introduction

Like it or not, planning is an essential part of good governance and a key responsibility for boards within a sports club. While not one of the glamorous tasks it plays a critical part in giving a club long term direction and a reference point for consistent decision making over time. From a board's perspective a good strategy will be simple, focused and able to be summarised on a single page. A good plan should be clear about the club's path, prioritise outcomes and lead the board when making choices between competing alternatives. It is a vital reference point during the board's decision making process.

Planning can sometimes be full of different terminology and jargon. Here are some of the key terms that may help grow your understanding.

- **Strategy:** The overall plan and its general direction.
- **Outcome:** An 'ends' statement or desired result specifying the impact the organisation is striving to achieve.
- **Initiatives:** Actions or programmes designed to progress achievement of the outcomes.
- **Tactic:** An action or 'mini-initiative', generally at the operational level.
- **KPI:** Key performance indicator.
- **KRA:** Key result area, an area of the business seen as essential to the plans achievement.
- **Vision:** An aspirational statement generally describing a desirable future state within the organisations target community.
- **Mission:** A description of the organisations purpose, its reason for being.

The Planning Process

The Planning Process can be described in three parts: T-E-E or Think - Execute - Evaluate

Think is the first step in the process and denotes the different considerations you need to take into account during the development of your strategy. For example, the different opportunities, threats, capabilities, goals and vision for the future you may have. Execute refers to the development, design, communication and implementation of your plan. The evaluate step looks at how successful you've been, and how you can adapt to continue improving. The planning process is continuous and the components will often overlap and connect.

Think

The 'think' part of the process can take a number of different approaches with no one right way to create strategy. Some key steps to consider:

- **Engaging Third Parties** – to help facilitate the process you can utilise personnel from the National or District body or Regional Sports Trust to free up management from an organising role to focusing on thinking and contributing as part of the team.
- **Stakeholder Engagement** – Consulting and understanding stakeholders is essential as their support is critical to the success of the organisation. Understanding who your legal, moral and other stakeholders are is important. For example, legal = members, moral = parents and casual participants, other = sponsors and suppliers.

- **Environmental Analysis** – Clubs do not exist in isolation, they operate in a dynamic and changing environment. A commonly used analysis framework is PEST which looks into the various Political (local and regional priorities, legislation), Economic (wealth, work class/type), Social (lifestyle trends, attitudes) and Technological (communication, information management, entertainment) factors that impact on the club and its stakeholders.
- **Benchmarking** – This is a great way to understand your club's capabilities by comparing yourself on important performance measures with other like and highly regarded organisations. This can be extended to identify key drivers of your success or under-achievement, pinpointing the distinctive internal capabilities and skills that sees you perform better or worse than similar or competing organisations.
- **SWOT** – This process assesses the internal (strengths and weaknesses) and external (opportunities and threats) environments of the club. These perspectives can help you determine the key strategic challenges facing your organisation.
- **Mission** – A good mission statement should describe the club's reason for being; capture the culture of the organisation; be clear and concise; provide guidance to the organisation's people.
- **Vision** – this statement should provide future direction; express an identifiable benefit to key stakeholders; motivate and inspire people towards a common goal.

Execute

The information gathered during the 'Think' phase is now used to determine direction and inform strategy design for the club. Some consideration needs to be given to those strategies that will provide the highest level of impact on the club's mission and the level of urgency required to address them. This may mean that you have to forego some strategic outcomes if they are no longer a priority or you need to free up resource for new initiatives. Some key questions you may like to ask yourself when determining which outcomes to focus your efforts on are:

- Would our key stakeholders support these outcomes?
- Would these outcomes achieve our purpose?
- Would these outcomes address the key issues faced?
- Is our club capable of delivering these outcomes?

Once you have decided on what you want to achieve it is time to consider the different strategic options (initiatives) you could utilise to achieve your chosen outcomes. Some strategic categories a club may wish to consider:

- Membership
- Services
- Events
- Governance
- Facilities
- Stakeholder relationships
- Volunteers

With outcomes established and options identified it is time to discuss specific initiatives (actions/programmes). Several initiatives may be required to cover the period of the plan to achieve a particular outcome and not all of the required initiatives will necessarily be known at the time of development. This should be noted in the plan.

Key Performance Indicators (KPI's) must then be chosen where a clear link between initiatives and results can be seen with a high degree of confidence. Over the period of the plan these initiatives should contribute to the high level outcomes.

The following is an example of how the strategy could be laid out with the appropriate Outcomes, Initiatives and KPI's:

| OUTCOMES | INITIATIVES | KPI's |
|---|--|--|
| There is a measurable increase in the total membership. | <ol style="list-style-type: none"> 1. Strong link established between local schools and the club. 2. Membership review to identify categories that meet the needs of local community. 3. Recruitment programme targeting women. | <ol style="list-style-type: none"> 1.1. 10% increase in total junior members. 1.2. 75% school relationship satisfaction rating. 2. 10% increase in total alternative member categories. 3. 5% increase in total women members. |

It is important that all parts of the organisation; working committees, employees, volunteers etc. understand how they contribute to achieving the desired outcomes. Communicating the strategy ('telling the story') to staff and stakeholders helps achieve buy in, energise the organisation and prepare it for change. The following is an example of a completed one-page strategy document from Sport Northland: [Click here](#)

Evaluate

One of the common failings when it comes to strategic planning is when it becomes a linear process. Making planning cyclical and a continual part of the boards activities allows the organisation to successfully update, adapt and learn as they go. Monitoring outcomes and evaluating results are the final key parts in the planning cycle.

There are two key things to remember when deciding on KPI's to measure success:

- **Attribution** - Is there a casual connection between initiative and result?
- **Measureability** - Are you able to measure impact and how easily?

It is important to have an intelligent measurement system that is not impossible or cost prohibitive to put a measurement against. Applying the SMART (Specific, Measureable, Achievable, Realistic, Time-bound) goal setting principles is useful.

Outside of achieving the set metrics (KPI's) it is useful to ask a number of questions to satisfy yourself that actions occurred as intended, had the desired impact and to determine where to next. These questions could include:

- Were the target groups reached?
- Did it go to plan? If not, why not?
- Were the resources and delivery good quality?
- Were the participants and key stakeholders satisfied?
- How might external factors have contributed to the results?
- Have there been any unintended impacts?
- In hindsight, what else could have helped?
- Should the initiative be continued or stopped? Why?
- What needs to change, and how?

You may wish to gather participant / stakeholder feedback via simple surveys, case studies or using independent experts to gather data.

Conclusion

While initially the planning process can seem like a big task, by keeping it simple and sticking to this simple process you can put your club on a path to a prosperous and sustainable future.

For more information, templates or further support contact the Community Golf team at NZ Golf on 09 485 3230 or your local Regional Sports Trust.

REFERENCES:

Sport New Zealand, Planning in Sport:
<http://www.sportnz.org.nz/assets/Uploads/attachments/managing-sport/strong-organisations/Planning-in-Sport.pdf>

Sport Northland, Strategic Overview:
<http://sportnorthland.co.nz/asset/downloadasset?id=e61cba9b-da24-48c4-868c-4ea35fd91f9d>

