



Strategic Planning

Sporting club and associations want to increase membership, raise funds, attract and retain volunteers, develop coaches and officials and maintain good financial and governance management practices.

Strategic business planning is a process of mapping out how a club or association can successfully achieve these goals.

Many of the documents written below have been adapted from the NSW department of sport and recreation club development resources that have been made available to the public via their website: <http://www.dsr.nsw.gov.au>

Follow the links below for more information on strategic planning.

[Why plan? And the seven essentials of a good plan](#)

[Guide to Planning – 5 easy steps](#)

[Strategic Planning: Content inclusions](#)

[Strategic Planning- Planning guide template](#)

[Return to Contents Menu](#)

Why Plan? - Strategic Planning

Before you start

Before you start preparing your plan, check with your regional, state and national sporting association about their plans for hockey. Federal and State Government of Sport and Recreation encourage a 'whole of sport' approach to the planning process and the development and implementation of the sports plan. Hockey Australia (HA) provides leadership in developing the 'whole of sport' strategic plan, clearly identifying which levels of hockey have a role in its delivery.

You may find one of Hockey Australia's strategies could involve your club or association. For example, Hockey Australia may want to increase the number of qualified coaches for the sport. This may require your club or association to incorporate coach training as part of your own strategic plan.

Basics of planning

A strategic business plan is the summary and evaluation of the planning process and outlines where your club or association wants to go and the necessary steps to get there.

A strategic business plan describes:

- How your club fits together
- Why your club is a vibrant sport that can meet its management goals and objectives
- The distinctive competencies of your club and its unique point of difference.

Benefits of planning

Planning your club or association's future will help you to:

1. Prioritise goals and objectives
2. Establish performance and evaluation criteria
3. Assess progress
4. Ensure a professional approach
5. Secure funding and win sponsorship deals
6. Identify promotion and marketing strategies
7. Allocate resources more efficiently
8. Show what your club or association can offer potential new players/members
9. Help volunteers and staff better understand the business of running a club or association
10. Involve members in decision-making therefore improve team morale.

Summary: A good business plan helps **prepare a club to be able to respond to future challenges** and contains objectives that are achievable and practical. There's no point developing a plan if it's too complex and difficult to put into action.

Through planning, a club can identify their **strengths, weaknesses, opportunities and threats.**

Seven essentials of a good plan

Understanding the main strategies of planning will help you achieve the best possible outcome for your organisation/club.

1. Vision	Without a vision, your club or association will have no focus. Hockey Australia's vision is: "Australian hockey- Fostering Excellence for All"
2. Commitment	Be committed to the vision, otherwise your club or association is unlikely to succeed.
3. Timelines	Create timelines showing when particular targets or milestones will be achieved.
4. Objectives	Avoid a long list of objectives as it is probably not realistic and will make it difficult for you to achieve.
5. Reporting	Focus on performance and trends that help determine change. Reports on membership numbers over the past few years, volunteer commitment, methods of fundraising provide an overview of past and present club or association operations.
6. Contingencies	Account for the risks your club or association might face and work out contingency plans. A SWOT analysis template will determine a club or association's threats and weaknesses.
7. Change	Any major changes affecting your club or association should be indicated in the business plan. A local school closing could impact on membership numbers at a club or association. A good plan will incorporate measures to prepare for this change so that member numbers remain stable or increase.

[Return to Strategic Planning Menu](#)

[Return to Contents Menu](#)

Guide to planning – 5 easy steps

Strategic business planning can be a simple, uncomplicated process if you take it step by step. Here is a guide to help you develop a business plan.

Step 1: Set up planning structure

Step 2: Establish current status and broad strategy

Step 3: Map what to include

Step 4: Write the plan

Step 5: Implement, monitor and review

Step 1: Set up planning structure

- Form a planning committee.
- Schedule meetings separate to board meetings.
- Identify key people who should be involved in your planning process – board directors, management, sponsors.
- If possible appoint an experienced external facilitator – someone who isn't involved in the organisation – to drive the planning process.

Establish best practice from the start – use the planning checklist included in this CD as a guide.

Step 2: Establish current status and broad strategy

- Consult with your club or association's state association for information about regional and national plans and other relevant information.
- Review club or association's past outcomes and present position, including club or association mission statement and corporate values. Your mission is what your club or association wants to achieve in the larger environment.
- Find out trends within the sport industry. For example there may be an increase or decrease in participation, access to funds, alliances with other club or associations etc. (HA and your state association can assist)
- Find out trends within your club or association. For example there could be an increase in females aged 18 – 25 participating at your club or association. HA's census results can assist you to find out these trends.
- Understand where your club is placed within the operating environment by undertaking a SWOT analysis to identify strengths, weaknesses, opportunities and threats.
- Establish realistic and timely performance indicators. For example: a club or association plans to conduct 5 coaching courses in one year.
- Draft action plans, assign responsibilities to key people.
- Analyse current financial status including forecast balance sheet, cash flow and profit and loss statement.

For help with your planning activities, use the planning guide template which includes a SWOT analysis included on this CD.

Step 3: Map what to include

You will now have enough information to incorporate into a formal business plan. To help you work out the layout and structure follow the content guide included in this CD.

Step 4: Write the plan

Once you have established the plan's sections and structure, you are ready to write the business plan.

If you need assistance, customise our sample plan to suit the needs of your club or association, including:

- Key Performance Indicators (KPIs)
- Sample SWOT analysis
- Implementation plans
- Financial explanations with sample cash flow forecast and budget forecast.

Step 5: Implement, monitor and review

A business plan creates the structure for you to put in place strategies and objectives identified in the plan.

To make the whole planning process a valuable and worthwhile activity for your club, you need to:

- Assign responsibilities for implementation of strategies
- Create realistic timelines for implementation of action plans
- Evaluate and update entire plan at least annually, ideally before budget planning.
- Regularly evaluate your plan:
 - Targets should be evaluated quarterly
 - Financial plans should be evaluated monthly
 - Action plans should be evaluated monthly, weekly and daily.
- Monitor, review and report progress at committee meetings.

[Return to Strategic Planning Menu](#)

[Return to Contents Menu](#)

Strategic Planning: Content inclusions

Strategic Plan Section	What to include
Cover sheet	<p>A cover sheet includes:</p> <ul style="list-style-type: none"> • name of the club or association • address of the club or association • telephone, fax details • Directors' names • date, stated as the strategic business plan for the three year period beginning XX.XX.XX.
Signature page	<p>A signature page states the names of each:</p> <ul style="list-style-type: none"> • director • key personnel within the club or association <p>and requires each of their signatures to show their commitment and ownership of the strategic plan.</p>
Executive summary	<p>Information to be included in an executive summary includes:</p> <ul style="list-style-type: none"> • an overview of the club or association's line of business • a brief outline of planned major events • the strategic direction of the club or association.
Table of contents	List the content of the strategic planning documents and relevant page numbers.
Major assumptions	Clearly detail all assumptions made to determine goals, objectives, strategies and action plans.
Critical success factors and issues facing the club or association	Discuss the factors that significantly impact upon the club or association's ability to be successful.
Club or association history	A short overview of historical milestones and past successes of the club or association.
Vision of the club or association	<p>The club or association's vision should state:</p> <ul style="list-style-type: none"> • what it does • your philosophy in regard to: <ul style="list-style-type: none"> - integrity - management - commitment - integrity and ethics - volunteers - management - growth and participation
List of goals and objectives over the long term	Simply state the club or associational long term goals and objectives that have been developed or are required. It is helpful to arrange these in key performance areas such as finance, facilities, marketing, and membership etc.

Tables identifying key performance areas, goals, objectives, strategies and action plans (Implementation plan)	A simple tabular section that details strategies and action plans to be implemented with the view to achieving long term goals and objectives.
Management structure	A club or associational chart showing the relationships between different areas of the club or association such as the board/committee, committees and management
SWOT analysis	An analysis of the strengths, weaknesses, opportunities and threats that exist within the current environment.
Financial data	Financial data generally included in a strategic plan includes: <ul style="list-style-type: none"> • Assumptions • balance sheet • income projections (profit and loss statements) • three year summary • detail by month for the first year • detail by quarters for the second and third years of the business plan • statement of cash flow.
Appendices	Relevant supporting information.

[Return to Strategic Planning Menu](#)

[Return to Contents Menu](#)



Strategic Planning- Planning guide template

Step 1: Before you start your business planning exercise, these questions should be answered to make sure everyone has a united goal for your club or association with developing the plan.

1. Briefly describe what goes into a strategic plan

2. Why is a strategic business plan important for your club or association?

3. Identify the advantages of developing goals, objectives and strategies for your club or association

4. Sketch an outline for your strategic business plan

5. What sort of information do you think is relevant for your strategic business plan?

Step 2: Determining your club or association's mission and vision

Once you have a clearly understood and committed mission statement, then all actions and decisions of the club or association can be measured against that mission statement.

"A club or association's mission statement is one that truly reflects the deep shared vision and values of everyone within the club or association and creates a great unity and tremendous commitment. It creates in people's hearts and minds a frame of reference they have bought into the changeless core of what the business is about." (S. Covey, The seven habits of highly effective people, page 143)

Our mission and our vision

Where are we now?

Where do you think your club or association is now?

How would you describe in a few sentences what your business is to someone who knows nothing of it?

Our mission incorporates

- the overall objective of our club or association
- our unanimity of purpose
- attitudes and outlook
- reason our club or association exists
- our philosophy and purpose.

Understanding the uniqueness of our club or association

It is important we have some understanding of the things, which help to set our club or association apart from other sporting or recreation club or associations. Some of these things may be positive and others may be negative (which we will want to plan to change).

These factors will help formulate our mission and vision.

Make some notes on the following:



The culture of your club or association

The club or associational norms

What the club or association stands for

Our vision

The vision is our determination of “where we want to be”.

The vision is a statement of our future.

It sets the objectives to motivate our focused efforts.

List some of the general things you would like your club or association to achieve in the future.

From determining our mission and our vision we can then move on to forming a mission statement.

Many club or associations have a central mission statement, then each key performance area may write their own individual mission statement in keeping with the central mission statement.

Step 3: Understanding the environment

Before writing your plan, you need to understand the environment in which the club or association operates.

One technique for doing this is called SWOT analysis. It is a review of the strengths, weaknesses, opportunities and threats to your club or association. Identify:

- strengths that the club or association possesses in its internal environment
- weaknesses in the internal environment
- opportunities in the external environment that are facing the club or association
- threats in the external environment that are facing the club or association.

Strengths	Opportunities
Weakness	Threats

[Return to Strategic Planning Menu](#)

[Return to Contents Menu](#)