

INTRODUCTION TO PLANNING

Planning is the key to sustainable future for all sporting and recreation organisations regardless of their level, activity, or size.

Why Plan?

Whether at national, state, or local level, organisations need to plan their long-term viability in order to grow. Planning helps to:

- Look at where the organisation has come from, where it is now, where it wants to go, and how it is going to get there.
- Identify the main objectives of the organisation.
- Encourage members to get involved in the development of the organisation.
- Assist clubs in adjusting to and predicting changes in their environment that will have an impact on the organisation.
- Ensure that resources (human, physical, and financial) are used effectively.
- Evaluate the organisation.

Strategic Plan

A Strategic Plan is a document that is designed to give the organisation some direction in the short to mid-term (2-4 years). It takes into account the internal strengths and weaknesses plus the external opportunities and threats to the organisation, and details strategies to address or build on these.

While there is no right or wrong way to prepare a Strategic plan, there are some basics that should be addressed as outlined below:

- Ensure the plan provides a clear basis for the direction of the organisation
- If a new Board or Staff member picked it up they should easily be able to use it to find out where the organisation is going in the next few years
- The plan should provide detail on how objectives are going to be achieved, i.e. prioritise the strategies and tasks, include resource allocation and target setting
- Consult stakeholders in the development of the strategic plan. For example, if your National Body has a strategic plan does your club's plan should refer to and reflect the priorities of the National Body.
- Planning should also involve communicating with your members and affiliates so that they have some ownership of the Strategic Plan and become willing partners in its implementation.

In general a Strategic Plan incorporates the following items:

- Vision and/or Mission statement.
- Core Business areas of the organisation.
- Goals/Objectives related to these business areas.
- Strategies/Tasks to be undertaken to achieve the Goals/Objectives.
- Timelines for the completion of those Strategies/Tasks.
- Resource Implications - what will it cost to do in people and monetary terms?
- Performance Indicators - how will you know when the Strategy/Task is completed?
- Priorities for action - what should be undertaken in year 1, year 2 etc...

Operational Plan

All those tasks that are to be achieved within the forthcoming 12 month period can be separated out of the Strategic Plan and placed into a separate document called the Operational Plan (those priorities for action over the next 12 months). The Operational Plan is then used by the staff and volunteers to guide their work during that time.

Business Plan

A Business Plan is a very detailed document that includes all of the information from a Strategic Plan and considerably more information about the business of the organisation.

While there is no specific format, a Business Plan might contain:

- **Title Page** - detailing the nature of the document, the name of the organisation, the period of time it relates to, and the date prepared.
- **List of Contents** - detailing the sections within the document and page references.
- **Executive Summary** - a broad statement of the background of the organisation, the purpose of the document, what is in it, how it was prepared and what are its' intentions.
- **Strategic Plan** - detailing organisation Mission Statement, Goals/objectives, etc.
- **Marketing Plan** - details information and research related to market demographics, products and services, price structures, place of delivery of products or services, an analysis of the competition, product life cycle, and promotional strategies.
- **Financial Plan** - details current and projected budgets, cash flows, and details as to any assets and liabilities.
- **Management Plan** - details of the structure of the organisation in terms of membership, board structure, and staff employed - may include an organisation chart and constitution or other related legal documents relating to ownership of the business.
- **Appendices** - lists all documents that may be referred to in body of the business plan.

Business Plans are documents that require a significant amount of time, resources and expertise.