

Contents

In these workshop notes you will find information and advice to assist you to better understand the planning process. The content will be helpful in the development of new plans or the review and revision of existing plans.

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1. Introduction

These workshop notes have been produced by JGC Group Pty Ltd on behalf of the Western Australian Department of Sport and Recreation.

A series of 6 workshop notes have been developed for the following topics:

- Operational planning and goal setting
- How to run your club
- Managing your club people
- Financial management
- Marketing and sponsorship
- Effective teams

A series of complementary resources packages designed for use at the state sports association and state recreation organisation level has been developed for similar topics.

The material in these notes covers the following learning outcomes:

- Why, what and when should you plan?
- Goal setting and establishing priorities for your club
- Planning models and processes
- The key elements of the planning process
- What does success look like – evaluating the plan

The notes provide some general information on planning and include some workshop activities that will be used during the delivery of an *Operational Planning and Goal Setting Workshop* for clubs which has also been developed by the Department.

The notes may also be used as stand-alone reference material to assist representatives from sports clubs who are unable to attend the scheduled workshop sessions.

2. Planning – why, what and when?

Planning is something we all do. Plans are part of our work, social and home life. We plan our work activities, we have personal financial plans and we plan our sports training schedules.

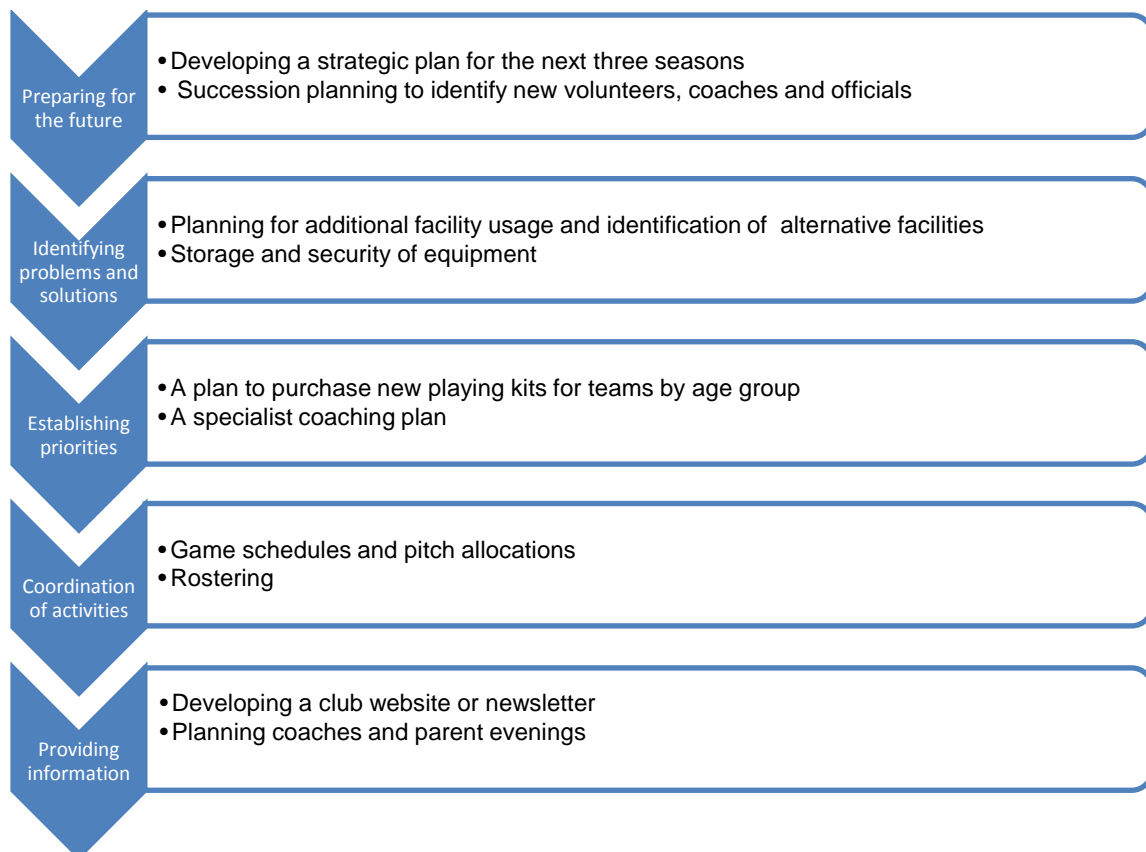
Planning occurs because we want to accomplish or achieve something – we set a goal and work towards it. Or we plan to avoid or prevent something happening.

Many of the planning processes we undertake are informal and we may not have a document that spells out our plans, but the process of thinking about the things we want to achieve or avoid is the same whether we commit our plans to paper or carry them around in our heads.

Planning usually occurs for one or more of the following reasons:

- To prepare for the future
- To identify problems and suggest solutions
- To establish priorities
- To coordinate different activities
- To provide information and advice

In sports and recreation clubs planning occurs for all the stated reasons as the examples in the diagram below show.





Activity

Think about club activities that have required you to develop or establish a plan and list these activities against the categories below.

Preparing for the future	
Identifying problems and solutions	
Establishing priorities	
Coordination of activities	
Providing information	

Planning is simply deciding in advance what is to be done, when it will be done, where and how it will occur and who will be responsible for doing it.

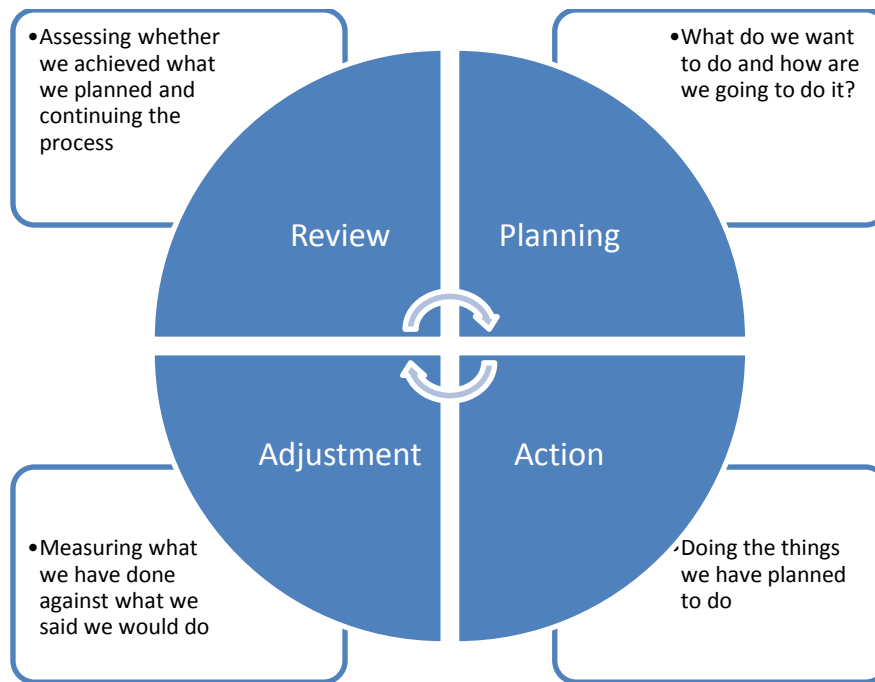
Planning takes us from where we are to where we want to be.

In a formal sense planning is a process that identifies a pre-determined course of action designed to achieve a specified goal. The key difference between planning as a formal process and the type of informal plans we design and implement everyday as we go through our daily lives, is that formal planning is a structured, systematic process.

Formal planning requires thinking before doing. It includes the identification or development of goals, objectives, policies, procedures and programs from among alternatives. For an organisation planning is an attempt to anticipate the future in order to achieve better performance.

The planning process that suits one organisation will not necessarily work with another organisation. The individual circumstances and condition of organisations will always be a factor in the planning process. However, regardless of the way a plan is developed and the arrangements that apply at the individual organisation level, the general rules, concepts and principles of planning will always apply.

A formal planning process requires the four basic elements shown in the diagram below.



For sport and recreation clubs a formal planning process and the plans that are developed from that process provide the following:

- Clear statements about the club's intentions and activities
- Information available to club members, participants and interested external stakeholders such as funding bodies on what the club is doing and what it intends to do
- A process that can be used to encourage greater involvement of members in club activities and the recruitment of new members
- The proper use of resources, facilities and equipment
- A structure that allows for the orderly operation of the club
- A consistent message and approach that will be in place regardless of changing personnel

What planning a club should undertake and what plans should be developed to guide a club's activities will depend on the individual circumstances of the club.

Is there a need to plan for the future operation of the club? Are there problems with the current operation of the club that may be solved by better policies and procedures? Is the club in need of more support and sponsorship?

The level of planning activity and the type of plans a club should develop will also depend on the availability of expertise and resources and the capacity of the club to manage the implementation of plans.

In general there are four types or levels of plans that a club might consider. These are:

- Long term plans focused on the future of the club – usually referred to as strategic plans
- Short term plans that look at the regular operation and activities of the club - usually referred to as operational plans
- Plans that focus on the commercial aspects of running a club - usually referred to as business plans
- Plans that focus on the revenue, expenditure and cash-flows associated with running a club - usually referred to as financial plans

There is no set or fixed approach to the style, look and composition of the plans listed. Many organisations have a single plan that covers all four aspects. Many sports and recreation clubs just focus on the day-to-day operation of the club and include operational, commercial and financial activity within a single document.

Regardless of the individual club model, there is a consistent approach to planning that applies no matter the type of plan or the blending of the various types of plans. That consistency is in the application of the four elements previously identified.

Planning → Action → Adjustment → Review



Activity

Think about the planning that occurs at your club and the type of plans that this planning activity has produced. Does your club have formal plans in place? What type of plans are they?

Planning is a continuous process. The development and implementation of a plan is not the end of the exercise. Plans need to be monitored, actions managed, results reviewed and plans revised and updated. As the previous diagram shows, it is a circular, continuous process.

There are obviously key planning moments that are dictated by the various stages in the process and a club needs to have in place a timetable of planning events to ensure planning activities occur when they are required to.

The following table shows the timing associated with the common types of planning and plans previously described.

<p>Long term – strategic plans</p>	<ul style="list-style-type: none"> • Requires significant time and resources to develop • Applies for three years or longer • Annual review of goals and progress • Major planning process every three years or longer
<p>Short term – operational plans</p>	<ul style="list-style-type: none"> • Less time required to develop than strategic plans • Applies for a 12 month period • Regular monitoring and review of progress – quarterly and often monthly • Review and re-write annually
<p>Business plans</p>	<ul style="list-style-type: none"> • Requires significant time and resources to develop • Applies for three years or longer – usually aligned to strategic plan • Annual review of goals and progress • Major planning process every three years or longer
<p>Financial plans</p>	<ul style="list-style-type: none"> • Less time required to develop than business plans (often included as part of a business plan) • Applies for a 12 month period • Regular monitoring and review of progress – quarterly and often monthly • Review and re-write annually

3. Planning models and processes

Most organisations approach the planning process at the strategic level and then work down to the plans for guiding the operations.

Even in the smallest of organisations a strategic view is useful in defining the current position and working out where the organisation wants to get to.

For most sports and recreation clubs a combined planning model that incorporates strategic and operational goals and objectives is the best approach.

Although it is not essential for a sport and recreation club to incorporate the development of a vision statement into its planning process, many clubs do.

A vision statement is often referred to as the image of the organisation at some point in the future.

As the term suggests, the vision statement is about what the organisation wants to become not what it is now.

Good vision statements are usually short, direct and show where the club wants to get to.

The following examples are vision statements from existing sports clubs – some very small and some that are internationally recognised.



Capalaba Warriors, Brisbane

To be recognised by the community as Brisbane's best junior rugby league club



Arsenal FC Academy, California

To provide a world class soccer program that develops world class soccer players



Domain Tennis Centre, Hobart

To be recognised as Tasmania's premier multi-court tennis facility



The Royal Geelong Yacht Club, Victoria

To be the premier yachting and boating centre in Australia



Echuca United Football Netball Club, Victoria

To be the preferred sports club in the Echuca-Moama region



Activity

Does your club have a vision for the future? What is it?

If your club does not have a vision statement, what would you like it to be?

Once you have established a vision for where you want your club to be you can start to plan how to get there. Or it may just be that you know that the most pressing issue for your club is to deal with key operational items and you have identified some essential things that you want to do.

Regardless of the point at which you start, you need to know what your club wants to do and you need a plan to get those things done.

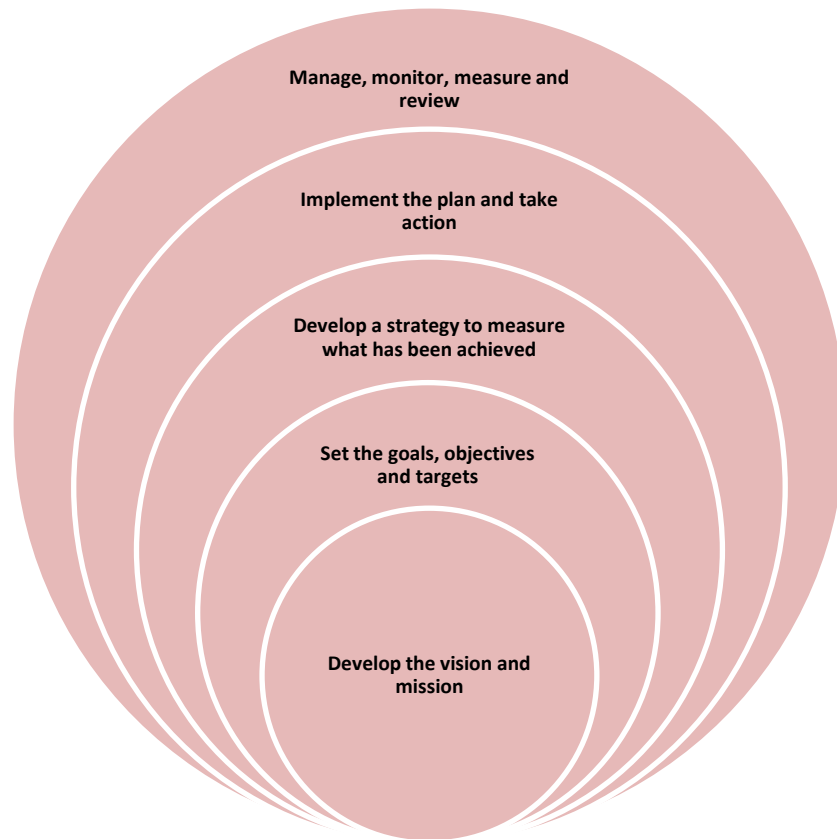
There is no set format or style for a planning document. Some plans are many pages long, others just a few pages in length and some are presented on just a single sheet.

Although there is no rule about the format, style or length of a plan, most plans will contain the following basic content:

- Vision statement
- Mission statement - the rationale or reason for the plan that often includes a statement about the purpose of the organisation and often the values of the organisation
- Strategies, goals and objectives – what the plan intends to achieve
- Targets and measures – how the organisation will measure success and know when the strategies, goals and objectives have been achieved

For sports and recreation clubs where most of the work associated with the development, implementation and management of a plan will be undertaken by volunteers, the message is to keep the document simple, easy-to-read and focussed on those key things the club wants to achieve in the period covered by the plan.

Planning is an integrated process. How you intend to implement and measure the outcomes of the plan needs to be considered at the start and throughout the planning process. The diagram below shows how all parts of the planning process are connected.



The Australian Sports Commission describes a mission statement as a brief description of a sporting organisation's purpose that identifies the scope of what the organisation does.

A mission statement should define in one or two paragraphs the organisation's reason for existence and purpose and may extend to cover things such as the organisation's values.

For sport and recreation clubs the development and promotion of a mission statement is a way to affirm for club members the reason why they belong to the club and a way of telling prospective members what the club has to offer.

The mission statement for the Capalaba Warriors junior rugby league club shows how a club can explain in just a few sentences, why it exists and what it aims to provide.

The Capalaba and District Rugby League Club is a family friendly community based sporting club in the Redland City.

Our aim is to provide a fun, safe, enjoyable environment that encourages all participants to reach their full potential no matter what their aspirations may be.

We will do this by providing the best possible facilities in an environment that aims to foster children's wellbeing.

Our success will be measured by the pride our members take in the club and the role models we produce within our community.



Activity

Think about the mission statement for your club.

If there is a mission statement in place does it clearly describe why your club operates and what it does?

If you are going to develop a mission statement, what will it say about your club, why it exists and what it offers?

4. Setting goals and priorities

A plan without some specific goals or objectives is like a car without an engine – from the outside it looks okay, but it's not going to get anywhere.

A plan is dependent on the goals that are clearly specified in it. Without goals and measurable objectives and targets it's not a plan it's just a document.



For sport and recreation clubs goal setting provides a process for growth and development, efficient operation, assessment of performance and the management of volunteers, assets, facilities and equipment.

Developing plans with specific goals allows a club to operate without the dependence on key individuals who carry the club's history, information and 'way of doing things' around in their heads.

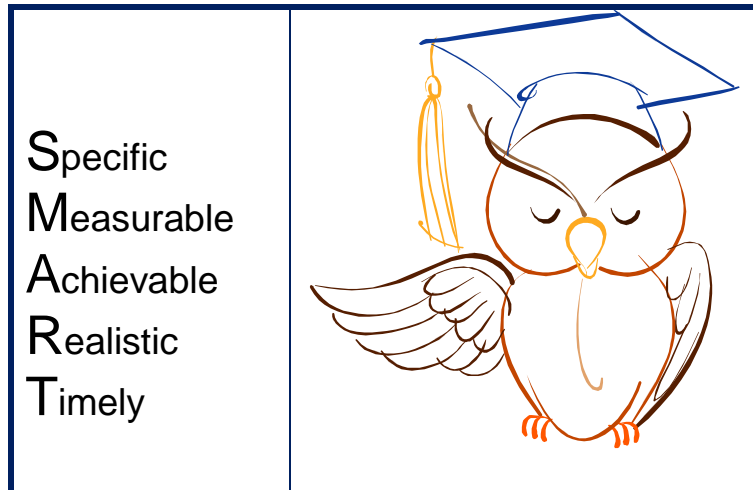
All formal planning processes require the development and identification of goals. There are different terms and titles used to describe the intentions and expectations of plans such as – goals, objectives, strategies, outcomes, target, measures, results – but the key point is that a plan should clearly show what is going to be achieved and how that achievement will be measured.

As planning is a part of daily life so is goal setting. We all set our sights on different things – going on an overseas holiday, losing weight, becoming fitter, getting a promotion – but often we do not formalise, document or measure our progress towards our goals and often we fall short of achieving what we had intended.

As someone once said, 'Goals are dreams with deadlines'

The process of achieving a goal is always improved when there is some thought, structure and formality applied.

The most common model used in developing and defining goals is the SMART approach. The diagram below shows the model.



The application of SMART will allow a club to establish goals and objectives for its future growth, volunteer management, revenue generation, operating procedures and any other club activity or requirement in a way that will almost guarantee success.

The details of the SMART approach are:

- Be **SPECIFIC** - Goals should be straightforward and clearly emphasise what the club wants to happen. A specific goal or objective will allow the club personnel to focus their efforts and to allocate responsibilities.

Being specific is the what, why, and how of the SMART model.

A club may want to;

Increase female participation in the 12 to 15 years age group.

- Ensure the goal is **MEASURABLE** - If you cannot measure it, you cannot manage it.

Whatever it is that the club wants to achieve it needs to be clear about the details of this achievement.

A club may want to;

Increase female participation in the 12 to 15 years age group by 15% when measured against the previous year.

- A goal should be **ACHIEVABLE** - If a club sets goals that are beyond its capacity to achieve it will almost certainly fail to achieve them. For example a 15% increase in female participation may be attainable but a 50% increase would not be.

A club needs to set goals that require the committed efforts of all those involved in the club, but needs to accept that the volunteer resources available to the club must be managed carefully.

- Goals and objectives should be **REALISTIC** – being realistic means that a club recognises the issues it may have in areas such as level of expertise, resources and availability of time and then construct its goals and objectives to suit. It does not mean taking the easy option, but it does mean taking the option that best suits the club.

A club may want to;

Increase female participation in the 12 to 15 years age group by 15% over 24 months when measured against the current membership.

- The process for the achievement of goals and objectives should be **TIMELY** – there should be a timeframe set for a goal and success measured against this.

The female participation goal may require 6 monthly checks across the 24 month period to assess progress.



Activity

Think about the goals and objectives your club has developed and measure some of these against the SMART approach.

Do you have specific goals or objectives?

Are the goals and objectives for your club measurable?

Do you think the goals and objectives in place for your club are achievable and realistic?

Is there a time element in place to achieve your club goals and objectives?

The most effective plans contain just a small number of strategic, organisational or operational goals. These are the key things a club wants to achieve or a description of the club's key directions that are directly linked to the vision and mission statements. The goals are supported by specific objectives with clearly measurable targets.

The content, direction and intention of a plan need to 'make sense' for club members and volunteers to embrace it. If there are too many goals and supporting objectives or if they are unclear it will be difficult to get broad support for the plan and consequently difficult to implement it successfully.

The process for setting goals and specifying objectives should continue the process adopted for the vision and mission statements – it should be clear, concise and straightforward.

Prioritise goals and objectives to ensure the most important things get dealt with first.

Each goal should be supported by a small number of objectives and there should be clear actions and targets associated with the objectives.

One of the clearest and easiest ways to present the club's goals, objectives, actions and targets is in a table.

Once a club has in place the level of detail shown in the table, the real work begins to ensure that the things the club has identified are achieved.

There needs to be an agreement on the timing for the completion of the plan's content. It is useful to show the timeline on the planning document.

There is also a need to allocate responsibilities to personnel within the club – committee members, key volunteers, planning group members – who will ensure the various elements of the plan are monitored and achieved. Although it is not necessary to list the details on the actual plan, there is a need to formalise the responsibilities of key club personnel so that it is clear who will be doing what.

The example that follows shows how this may be applied.

Goal	Objectives	Action/Target
Increase female participation	Register more players for the 10 to 15 years girl's teams	Direction promotion of the club to 15 nominated high schools in the district Female players in the 10 to 15 years age group will increase by 15% on the previous season
	Increase the number of girl's teams at the club	Two additional girl's teams will be registered for formal competition
	Recruit and develop female coaches	Four new female coaches will be recruited and will complete a Level 1 coaching course
	Recruit and develop more female volunteers for roles such as team managers	Female volunteer drive will be conducted across the club membership Four new female team managers will be recruited

Every organisation needs to prioritise tasks and activities. There is always a list of things that fit into the 'need' or 'want' categories and because of this some method of prioritisation is required.

The planning process at a sport or recreation club will identify a large number of goals and objectives – not all of which will be achievable in the time allocated to the plan.

The SMART approach will also help here.

Another key aspect of the planning process that needs to be considered in relation to priority is whether the details of a plan are manageable.

A plan that has too many goals and objectives, too many targets to measure and too much detail to digest will almost certainly fail.

There is a need to prioritise and to reduce the details of a plan to cover those key, immediate and essential elements.

Of course, what one person considers essential is regarded by another person as unimportant, so an objective method of prioritising is needed.

The simplest method for a club is the ranking of goals and objectives by order of importance and for those involved in the planning process to agree on how many of the highest ranked items are included in the plan.

Individual club members involved in the planning process can 'vote' on the importance of goals and objectives by ranking them all or selecting the top four or

five in accordance with the agreement on how many highest ranked items will be included.

The following tables show how these approaches may be used.

‘Rank the top 5’

Goal/Objective	Person 1	Person 2	Person 3	Person 4	Person 5
Increase female participation	★		★		★
Secure government grants		★			★
Increase revenue from the canteen	★		★		
Securing promotion to higher level competition for top teams		★		★	★
Replace playing kit for all junior teams		★	★	★	
Establish a volunteer management plan	★				★
Improve club coaching standards	★	★		★	
Increase the number of junior teams				★	★
Increase total player numbers			★	★	
Secure new sponsors	★	★	★		

‘Rank all 10’

Goal/Objective	Person 1	Person 2	Person 3	Person 4	Person 5
Increase female participation	1	6	2	7	2
Secure government grants	10	1	6	9	4
Increase revenue from the canteen	2	9	4	8	10
Securing promotion to higher level competition for top teams	6	2	8	2	1
Replace playing kit for all junior teams	7	3	3	1	6
Establish a volunteer management plan	3	8	9	10	3
Improve club coaching standards	4	5	7	3	9
Increase the number of junior teams	8	10	10	5	5
Increase total player numbers	9	7	5	4	8
Secure new sponsors	5	4	1	6	7

The first table shows that each of the five people involved in the planning process selected their top five goals and that this process produced four specific goals selected by at least three of the people.

The second table shows the same outcome using a ranking approach whereby each person ranks all ten identified goals from 1 to 10 with one being the highest ranking.

This approach resulted in the same four goals being selected in the top five choices by at least three of the people.

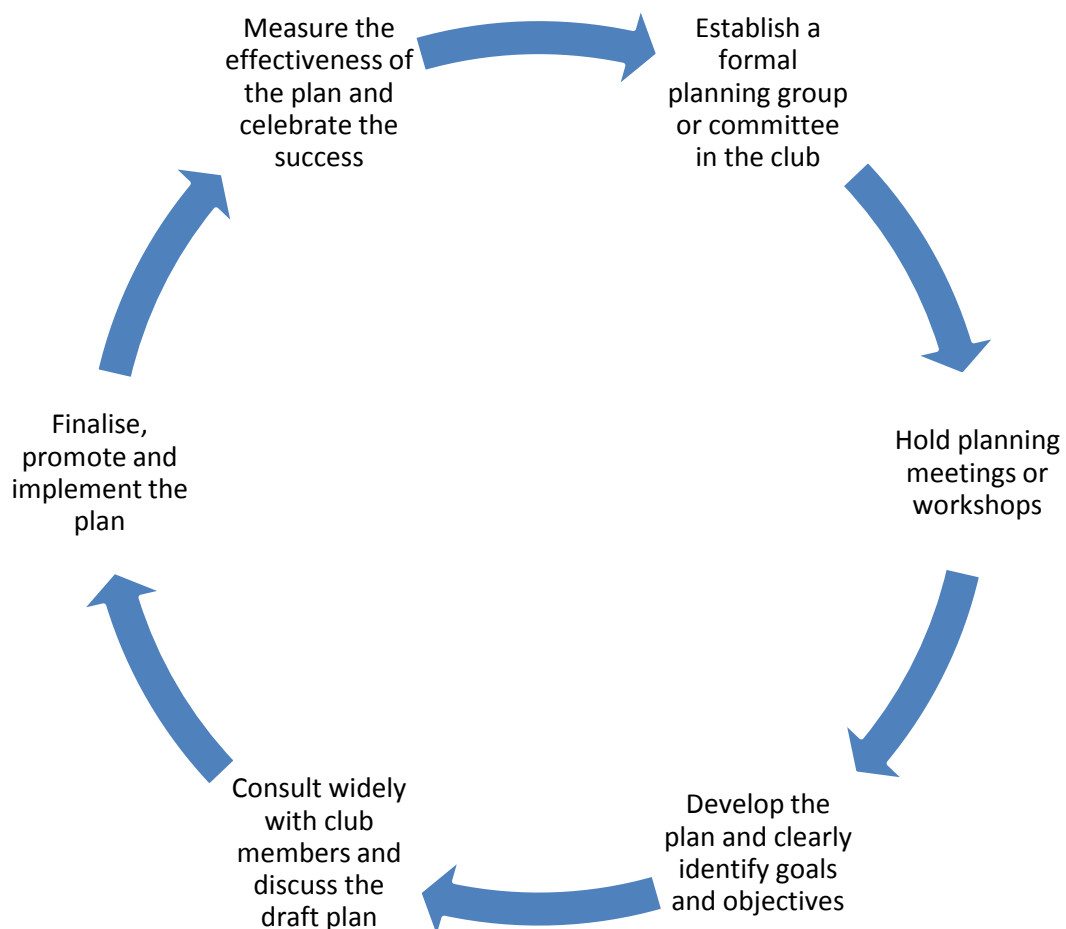
For this club, both ranking approaches have identified the following four goals as priorities:

- Increase female participation
- Securing promotion to higher level competition for top teams
- Replace playing kit for all junior teams
- Secure new sponsors

There are a range of ranking models that may be used to identify priorities, but most are just variations on the theme of the two approaches shown.

5. Elements of the planning process

The best way to approach the planning process at the club level is by using the model shown in the following diagram.

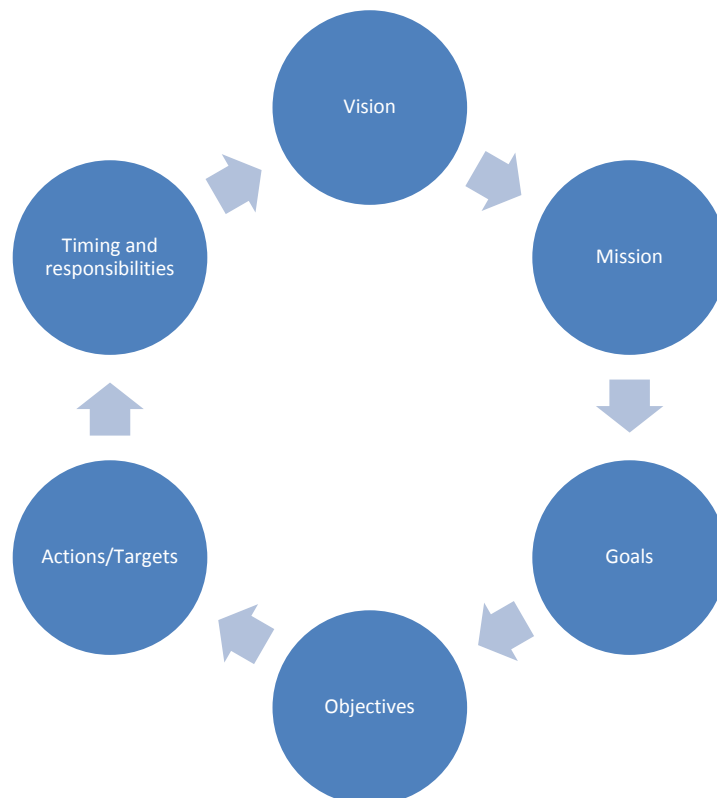


These six activities represent the key elements of planning and if followed at the club level the likely result will be the effective development and implementation of a plan and the successful achievement of the plan's objectives.

Establish a group – Although the management committee of a club will play an important role in the planning process, there is a need to 'cast the net' a bit wider to find people with some skills or interest in the planning. It is also important to include a broad range of club members in the process – senior players, coaches, key volunteers and parents of junior players.

Hold specific planning sessions – It is important that planning is not included as an item on the agenda at general meetings. The development of a plan takes time and needs to include people not normally involved in the administration of the club. Find a person who can organise and facilitate the planning sessions. These sessions should decide on the content of the plan.

Develop the plan – Identify a committee member or a club member who can draft the plan. It should be a simple, easy-to-read document that follows an agreed format. The model below is a good starting point. The content of the plan should be determined at the planning sessions.



Consult widely – it is important to get a broad understanding about the plan and the intentions behind it from across the club membership. The plan needs to have 'ownership' within the club so there is a need to consult with club members, release

a draft of the plan, allow time for comment and then set a date for formal release and implementation.

Implement the plan – the implementation of the plan is the process of getting the things done that you have said need to be done. The objectives and targets in the plan should be monitored and steps taken to complete activities by due dates. The monitoring process will allow you to identify barriers and road-blocks and to adjust things as required to ensure the achievement of the plan.

Measure the effectiveness – most clubs will measure the success of a plan on an annual basis. What was achieved? What remains to be done? What stopped parts of the plan being achieved? The process is a continuous one and as each planning cycle ends a new cycle begins.

6. Successful planning and successful plans

Only through the measure of achievement as specified in a plan will a club be able to state that it has done what it set out to do.

The example of a club goal to achieve an ‘increase in female participation’ as previously stated is measured by the achievement of the various targets.

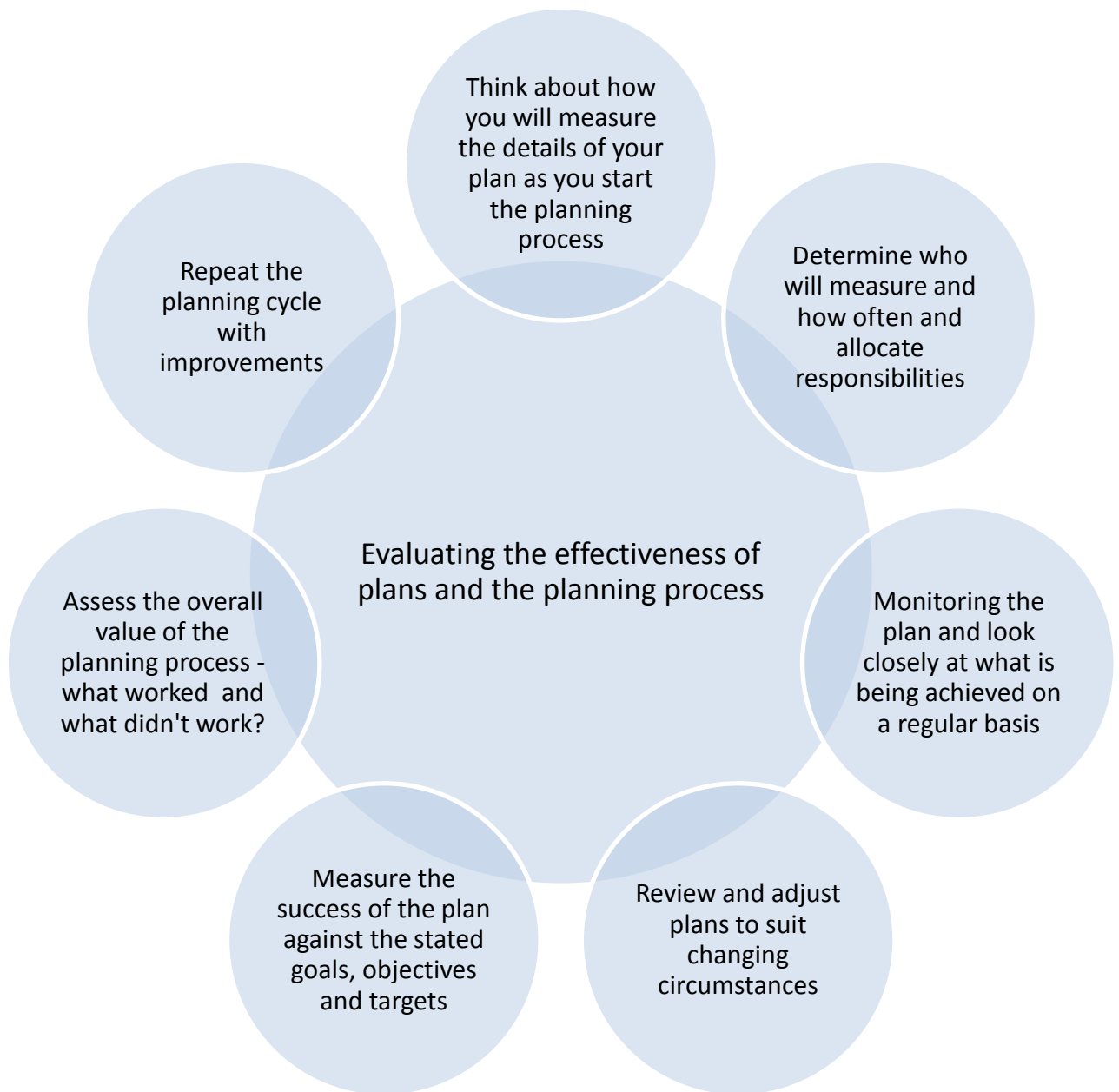
- Was a direct promotion campaign applied to 15 local high schools?
- Did the club increase the number of female players in the 10 to 15 years age group by 15%?
- Did the club enter two additional girl’s teams in formal competition?
- Did the club recruit four new female coaches and did these new coaches complete a Level 1 coaching course?
- Was a recruitment drive applied across the whole club targeted more female volunteers?
- Did the club recruit four new female team managers?

A club that establishes a successful planning process will almost certainly create successful plans.

A focus on the planning elements described throughout these notes will ensure that a club follows a structured and formal pathway for planning. Good planning results in good plans.

It is important to recognise that a plan is a dynamic document that needs to be reviewed and adjusted to suit changing conditions. As things changes, plans should be adjusted to suit the changing circumstances. An annual review process is a good way to consider the changing environment.

The following diagram shows the various components for considering and measuring the effectiveness of the planning process and the plans produced from that process.





Activity

Think about how the planning process should work at your club? Is the current process effective?

If your club does not currently have a plan in place and no formal planning occurs, what needs to happen to get planning started?

Use the following checklist to determine the next steps you need to take.

CHECKLIST

Does your club have....

Elements	Yes/No	Actions Required
Plan		
Vision		
Mission		
Goals and objectives		
Actions and targets		
Priorities established		
People and resources		