



Strategic Planning Toolkit

July 2018

COPYRIGHT: This resource is subject to Crown Copyright. Except as permitted under the Copyright Act, or identified in this resource, no part may be reproduced by any process, electronic or otherwise, without the specific written permission of the NSW Office of Sport. No part of this publication may be stored electronically in any form whatsoever without such permission.

DISCLAIMER: Whilst all care has been taken in the preparation of this resource, no responsibility is accepted by the author(s), NSW Office of Sport, its staff or volunteers for any errors, omissions or inaccuracies. This resource is of a general nature only and is not intended to be relied upon, nor as a substitute, for professional advice. No responsibility can be accepted by the author(s) or the Agency for loss occasioned to any person doing anything as a result of the material in this publication.

© 2018 Edition

Table of Contents

1.	Introduction to strategic planning	3
1.1	Introduction.....	3
1.2	How to use this resource	3
1.3	Scope and limitations	3
1.4	What is a strategic plan?	4
1.5	Why do strategic planning?	4
1.6	Benefits of strategic planning.....	4
1.7	Useful terms used in this resource.....	4
1.8	More information	5
1.9	Strategic planning checklist	6
2.	Development of a strategic plan	8
2.1	A good practice approach to strategic planning for SSOs with or without paid staff	8
2.2	Setting the context.....	9
2.3	The role of the board in strategic planning.....	11
2.4	The role of directors in strategic planning	12
2.5	Who else should be involved in strategic planning.....	12
2.6	Stakeholder needs.....	12
2.7	Stakeholder Needs Matrix	14
2.8	Components of a strategic plan	15
2.9	Content inclusions	16
3.	Implementing your strategic plan	19
3.1	Communication	19
3.2	Communication responsibilities matrix.....	19
3.3	Communication responsibilities checklist.....	20
3.4	Implementation plans	21
3.6	Planning guide.....	23
3.7	Understanding the environment.....	25
3.8	Problems for directors in the strategic planning process	26
4.	Monitoring and evaluation.....	28
4.1.	Monitoring and evaluation checklist	29
4.2.	Modifications	31
5.	Using a consultant	33
5.1	Consultant pre-engagement checklist.....	34

1. Introduction to strategic planning

1.1 Introduction

Strategic planning doesn't have to be complicated; the greatest value that can be obtained through the strategic planning process is gained through simple plans that are implemented, monitored, actioned and evaluated.

This resource has been developed to assist State Sporting Organisations (SSOs) to implement a strategic plan and to understand the role that directors play in providing strategic direction for their organisation.

Strategic planning is integral to the success of an organisation's growth and development. By following a set strategy your strategic plan will provide a sound guide to assist with best practice governance of your organisation.

1.2 How to use this resource

Board or Committees of Management (the Board) are comprised of the directors or members as per the SSO constitution. The Board is ultimately responsible for the success of the organisation it governs.

To be effective a board should have a clear vision for, and understanding of, the purpose and future direction of the organisation. An important function of the board therefore is to plan strategy and direction and develop a strategic plan that should guide staff and members to achieve identified objectives.

The board should determine the process by which it oversees and develops the strategic direction, key objectives and performance measures as well as the core values and ethical framework for the organisation.

All key organisational stakeholders should be consulted throughout the organisation's strategic planning process. This should ensure future strategies address the most important issues facing the organisation, its stakeholders and the wider sport sector.

A national 'whole of sport' strategy enables all levels of a sport to operate with the same purpose and direction for the benefit of the sport as a whole. It enables all involved to have a clear, specific and inspiring understanding of what the sport aspires to achieve and, importantly, how they collectively help to achieve this.

This resource provides you with a practical approach to understanding your role in strategic planning for your organisation and gives you a guide to assist with implementing, monitoring, evaluating and modifying your strategic plan to provide best practice procedures in developing and guiding your organisation's future.

1.3 Scope and limitations

This resource is designed to provide directors with guidance as to the role they play in strategic planning for their organisation. Each organisation varies in the level to which strategic planning is adopted. Directors are advised that strategic planning need not be an onerous task. Simplicity is the key to making sure your organisation understands the direction it is taking for the future.

The board's involvement in strategic planning will depend primarily upon the management structure of the organisation and the available resources.

For organisations that do not have paid staff, directors may have a more hands-on approach to producing a strategic plan. Strategic planning should be an integral part of the culture of your organisation. Growth will come from communicating successes to your members. A strategic plan provides a living document to give guidance for future development. Ensure your SSO plan aligns with your sport National Sporting Organisation (NSO) Plan(s).

1.4 What is a strategic plan?

'If you don't know where you are going every road will get you nowhere' Henry A. Kissinger

Your strategic plan is a road map developed to take your organisation from where it is today to where you want it to be, typically over a three to five-year period. A strategic plan covers all aspects of a business including finances, people, structures, systems, process, products, customers, suppliers and competitors.

1.5 Why do strategic planning?

All successful organisations are built on a platform of sound planning and administration.

A strategic plan is a simple tool that can be used to assist you in the planning and administration of your organisation. A strategic plan is often required by funding bodies, local government and corporate sponsors to demonstrate that the board of a SSO:

- has a clear picture of how the monies will be spent and how they will benefit the organisation in a manner that is consistent with the long term strategic direction of the organisation
- will use the funds to provide maximum exposure for the funding body or sponsor.

1.6 Benefits of strategic planning

There are many benefits associated with strategic planning:

- It clearly defines your organisation's purpose.
- It sets out in a logical and clearly thought out manner your vision and how you plan to achieve your goals and objectives.
- It ensures effective utilisation of resources by implementing relevant strategies that achieve the greatest gains.
- Where funding is being sought a strategic plan provides information required by financial institutions.
- It shows potential sponsors, government funding authorities and other stakeholders that you understand your business.
- It allows you to communicate clearly the direction the organisation is taking.
- It assists you to develop and implement effective strategies to counteract your threats, work on your weaknesses, use your strengths and capitalise on your opportunities.

1.7 Useful terms used in this resource

The following are definitions of key terms that are mentioned throughout this resource:

- **Board or Executive OR Committee of Management (the Board)** - the body comprised of the directors and includes executive committees of management as per the entity's rules.
- **Committee** - a body delegated authority by the Board to undertake tasks on behalf of the Board.
- **Director** - a person (office bearer) who is a member of the Board and who is charged with the management (in a governance sense) of the entity.
- **Goal** - The overall aspirations which the SSO strives to achieve. While usually difficult to measure and quantify, goals set the direction of the SSO and support the mission statement.
- **Key performance areas** - The specific areas of operation which the SSO wishes to categories its desired achievements. Focus areas are those specific operational sub areas.
- **Mission statement and corporate goals** - A statement of your SSO's purpose and what it wants to achieve in the larger environment. These are normally specified in the constitution.

- **Not-for-profit** - according to the Australian Tax Office is any organisation which is not operating for the profit or gain of its individual members, whether these gains would have been direct or indirect. This applies both while the organisation is operating and when it winds up. A not-for-profit can still make a profit but it must be used to carry out its purposes as per its Constitution and must not be distributed to any of its members.
- **Objective** - A set of clear statements of obtainable results or ends within a defined term. They are expressed as **SMART** - specific, measurable, achievable, realistic, and time bound, and are consistent with the SSO's goals. A good objective will have its own performance indicators.
- **Office bearers** - are elected or appointed to boards or committees of sporting clubs/associations who are often seen as community sports leaders. Typically, club office bearers have higher levels of involvement and are responsible for running their club. Office bearers have legal obligations as directors and are often given titles including committee member, sports administrator, president, chairperson, treasurer, secretary, public officer, company secretary.
- **Operational planning** - describes milestones, conditions for success and explains how, or what portion of, a strategic plan will be put into operation during a given operational period, in the case of commercial application, a fiscal year or another given budgetary term. An operational plan is the basis for, and justification of an annual operating budget request. Therefore, a five-year strategic plan would typically require five operational plans funded by five operating budgets.
- **Outcomes** - In the context of the strategic plan, each strategy has an outcome(s) by which the consequence of the SSO's goals, objectives and strategies can be measured. The outcomes must be measurable to indicate the success of implementing the plan.
- **State Sporting Organisation** - means a State Sporting Organisation whether incorporated or not, public or private, that has its own functions(s) and administration. If incorporated it will generally be incorporated under the Act or an Australian Public Company Limited by Guarantee under the Corporations Law.
- **Strategic planning** is an organisation's process of defining its strategy, or direction, and making decisions on allocating its resources to pursue this strategy. It may also extend to control mechanisms for guiding the implementation of the strategy.
- **Strategies** - Activities that are implemented towards the achievement of stated measurable objectives. They describe the actions to be taken by the SSO in order to achieve each objective.
- **Volunteer** - a representative from the community who freely chooses to give their time, skills and experience to support their sport or recreation activities.

1.8 More information

- **Community Club Toolkit – Planning**
<http://www.communityclubtoolkit.com/PlanningForTheFuture.html>
- **Clearinghouse for Sport**
 A huge library of info and resources specifically for Australian sport.
<https://www.clearinghouseforsport.gov.au/>

1.9 Strategic planning checklist

The following checklist will help determine your understanding of your organisation's strategic plan

Directors Note

This checklist should be used by new directors on appointment and by the board annually when reviewing strategic plans.

Question	Yes	No	Action
Do you have a clear understanding of where your organisation is going over the next 3 - 5-year period?	<input type="checkbox"/>	<input type="checkbox"/>	
Do members of the board, employees and volunteers who work within your organisation understand your organisational vision, goals and objectives?	<input type="checkbox"/>	<input type="checkbox"/>	
Do you know the strengths, weaknesses, opportunities and threats faced by your organisation?	<input type="checkbox"/>	<input type="checkbox"/>	
Do you have strategies in place that use the strengths of your organisation, capitalise on the opportunities, mitigate your threats and improve your areas of weakness?	<input type="checkbox"/>	<input type="checkbox"/>	
Do all the board members, employees and volunteers know their role in achieving your organisational goals?	<input type="checkbox"/>	<input type="checkbox"/>	
Is your progress against your strategic plan being monitored with relevant key performance indicators?	<input type="checkbox"/>	<input type="checkbox"/>	

If you do not have a strategic plan, consider the benefits of using one.

If your response to any of the above questions was **No** but you do have a strategic plan, you may need to revisit its content.

Director Checklist Points to remember

Introduction to strategic planning

Please tick the box if you have read and understood the information relating to each question from the previous section.

What is a strategic plan?

A strategic plan is a road map developed to take your organisation from where it is today to where you want it to be.

Why do Strategic Planning?

A strategic plan will provide you with a tool to assist the board and the organisation

Benefits of strategic planning

Benefits of strategic planning include:

- access to a wide variety of government and corporate funding
- demonstrating a strong understanding of the organisation's purpose
- detailing the organisation's vision
- detailing the direction the organisation is taking
- maximising the chances of successful marketing initiatives
- providing a communication medium through which the organisation can communicate its vision to members

2. Development of a strategic plan

2.1 A good practice approach to strategic planning for SSOs with or without paid staff

Consider the following planning process

1. Establish the context with which your board must assume responsibility for strategic planning.
2. The board takes a structured approach to strategic planning, considering the pre-planning activities that need to occur, the planning session itself, the documentation of the operational plan and the follow up of the plan.
3. The board identifies key performance areas (KPA's) and assigns portfolios for each area to specific board members.
4. The board analyses the strategies for each KPA.
5. The board communicates the strategies to all appropriate levels of the organisation.
6. The director assigned to each portfolio consults with the relevant people associated with implementing the identified strategies.
7. The board assesses the strategies for each KPA at board meetings using reports on each KPA as an agenda item.
8. The board monitors and reviews the strategies for each KPA and reports any modification to the relevant people associated with overseeing each strategy.

Use the above as a checklist. Once you have achieved each step, tick the box.

To assist your organisation in determining the level of involvement the board should take in strategic planning please refer to the tables in the organisational context.

2.2 Setting the context

Organisational characteristics

SSOs are not all the same. Differences arise because of many different factors such as:

- size of the organisation
- sport activities
- funding.

Use the following table to identify the type of your organisation:

Characteristics	Type 1	Type 2	Type 3
Legal status	Basic constitution, unincorporated or small incorporated association	Small to medium incorporated association or company	Medium to large incorporated association or company
Workforce	Volunteer	Volunteer, part paid	Paid administrators
Organisational structure	Basic committee	Properly constituted committee/ subcommittees	Board of directors, management committee
Management expertise	Volunteer only	Training encouraged	Expertise sought/ paid
Planning	Short term	Short/medium term	Long term
Membership	<200	<500	>500
Technical expertise In any SSO, there is a technical level of work that requires specialised knowledge and skill. It can be learned through education, experience, or both. Depending on the organisation and level of skill, different types of education and perhaps formal qualifications are required.	Formal qualification encouraged and supported	Formal qualification encouraged and supported	Formal qualifications required for full time staff* *Full time positions in a large SSO will require some formal education/training/qualifications. Examples of such positions that may exist in large SSOs are <ul style="list-style-type: none"> • Financial Officer • Coaching Director • Officiating Director • High Performance Program Manager • Participation Development Manager • Competition/Operations Manager • Media/Communications Manager • IT Manager
Range of activities	Narrow	Expanding	Broad

Characteristics	Type 1	Type 2	Type 3
<p>Assets</p> <p>Any item of economic value owned by the SSO. Examples are cash, securities, accounts receivable, inventory, office equipment, real estate, a car, and other property.</p>	Equipment only	Equipment, club rooms, offices	Equipment, club rooms, offices and facilities
Affiliation with a NSO	Affiliated	Affiliated	Affiliated

2.3 The role of the board in strategic planning

The role of a board and its members is to give direction to the organisation and accept responsibility for its management.

The board has a responsibility to facilitate discussion and debate about the inevitable range of key strategic issues involved in shaping the longer-term business strategy.

The board should seek a comprehensive corporate and strategic plan covering at least a three-year horizon be prepared or reviewed each year, and in a very rigorous and disciplined way.

Broadly speaking the role of a board in **strategic planning** may be to complete all or some of the following:

- approve developed strategy
- monitor progress against the strategic plan on a regular basis
- debate strategic issues
- guide and trigger the strategic planning process
- design an
- d generate the strategic plan
- produce the strategic plan.

The board's involvement in strategic planning will depend primarily upon the management structure of your organisation and your available resources.

Use the following table to identify the level of involvement that your board should have in strategic planning, based on the type that your organisation belonged to in the organisational characteristics table above.

Activity	Type 1	Type 2	Type 3
Approve strategy developed	✓	✓	✓
Monitor progress against the strategic plan on a regular basis	✓	✓	✓
Debate strategic issues	✓	✓	✓
Guide and trigger the strategic planning process	✓	✓	✓
Design and generate the strategic plan	✓	✓	✓
Produce the strategic plan	✓	✓	✓

KEY

- ✓ Optional
- ✓ Recommended

2.4 The role of directors in strategic planning

Given that a strategic plan is an essential tool to ensure that an organisation is financially viable, properly managed and constantly improved, directors are required to be actively involved in the determination of the strategic direction.

As a director your responsibilities with regards to strategic planning may include:

- participation in strategy development depending upon both the structure and resources available to the organisation
- implementation/ assisting the management team to implement strategy
- monitoring and evaluation of progress against the strategic plan

2.5 Who else should be involved in strategic planning

All key personnel should be involved in the strategic planning process. Key personnel may include board members, management, and volunteers who play an integral role within the organisation. Active participation in the process by key personnel helps to ensure that the strategic direction is consistent and well communicated throughout the organisation.

Responsibility for the following activities should be clearly stated in your strategic plan:

- Who is responsible for implementation of the plan?
- Who is responsible for the achievement of goals and objectives?
- Who is responsible for evaluating performance against goals and objectives?
- How will performance against the plan be communicated to relevant stakeholders?

When assigning responsibilities careful consideration must be given to the skill level of the staff or volunteers being given the work. Planning skills, time management and a genuine commitment to the sport and recreation organisation are valuable.

Given that the sport industry relies upon many volunteer workers it is important to ensure that those who are being assigned roles of responsibility are able to commit their time to complete the relevant activities.

2.6 Stakeholder needs

Prior to the development of your strategic plan it is important that the board, directors and all key personnel understand their stakeholder needs.

The following table may be used early in the strategic planning process in order to highlight who your stakeholders are and their needs.

It is also important to redo your stakeholder needs analysis whenever your board reviews your strategic plan as changes may have occurred.

Stakeholder needs analysis – a pre-planning task

Step 1. Begin by asking the question 'who are our stakeholders?'

E.g.

	STAKEHOLDER GROUP		
	Members	Coaches	Spectators

Step 2. Brainstorm the needs of each stakeholder group. There are a number of ways to capture view of stakeholders including via surveys, calls for submission, steering groups.

E.g.

	STAKEHOLDER GROUP		
NEED	Members	Coaches	Spectators
Safe environment	✓		✓
Value for money	✓		✓
Health and fitness	✓		
An understanding or rules & regulations		✓	

Step 3 Rate the importance of each need to the stakeholder as high, medium or low.

E.g. Stakeholder group **Members**

	IMPORTANCE TO THE STAKEHOLDER	
NEED		
Safe environment	High	
Value for money	Med	
Health and fitness	Med	
An understanding of rules and regulations		

Step 4 Rate the potential positive or negative impact on the organisation from providing each of the stakeholder needs as high, medium or low.

E.g. Stakeholder group **Members**

	IMPORTANCE TO THE STAKEHOLDER	POTENTIAL IMPACT ON THE ORGANISATION
NEED		
Safe environment	High	High
Value for money	Med	Med
Health and fitness	Med	High

Those stakeholder needs that have scored a high level of importance to the stakeholder and a high impact on the organisation are critical success factors that should be considered when developing your strategic plan.

In the example shown above, providing a safe environment is a critical success factor that the organisation will need to focus upon in order to satisfy existing members and attract new members. Therefore, in developing the strategic plan in this example some of the goals and objectives should be aligned with providing members with their recognised needs.

2.7 Stakeholder Needs Matrix

STAKEHOLDER GROUP

NEED	IMPORTANCE TO THE STAKEHOLDER	POTENTIAL IMPACT ON THE ORGANISATION

2.8 Components of a strategic plan

As discussed in the *Setting the context* section of this document each organisation may be different for a variety of reasons. As a result, some of the standard sections of a strategic plan may not be applicable to all SSOs.

The following table can be used to assist you to determine those sections that you should consider including in your own strategic plan.

CHARACTERISTICS	TYPE 1	TYPE 2	TYPE 3
Cover sheet	✓	✓	✓
Signature page	✓	✓	✓
Executive summary	✓	✓	✓
Table of contents	✓	✓	✓
List of major assumptions	✓	✓	✓
List of critical success factors and issues facing your organisation	✓	✓	✓
Organisation history	✓	✓	✓
Vision of the organisation	✓	✓	✓
List of goals and objectives over the long term	✓	✓	✓
Tables identifying key performance areas, goals, objectives, strategies, action plans	✓	✓	✓
Management structure	✓	✓	✓
SWOT analysis	✓	✓	✓
Financial data	✓	✓	✓
Appendices	✓	✓	✓

KEY

- ✓ Optional – include where you think relevant
- ✓ Recommended

2.9 Content inclusions

Some of the standard sections of a strategic plan may not be applicable to all SSOs.

The table below includes a breakdown for each component and can be used to assist you to determine those sections that you should consider including in your own strategic plan.

Strategic Plan Section	Context	Now, where, how model reference	Yes	No
Cover sheet	<p>A cover sheet includes:</p> <ul style="list-style-type: none"> • Name of the organisation • Address of the organisation • Telephone, fax details • Directors' names • Date, stated as the <i>Strategic plan for the 3 year period beginning XX.XX.XX</i> 	General	<input type="checkbox"/>	<input type="checkbox"/>
Signature page	<p>A signature page states the names of each:</p> <ul style="list-style-type: none"> • director • key personnel within the organisation • and requires each of their signatures to show their commitment and ownership of the strategic plan 	General	<input type="checkbox"/>	<input type="checkbox"/>
Executive summary	<p>Information to be included in an executive summary includes:</p> <ul style="list-style-type: none"> • an overview of the organisation's line of business • a brief outline of planned major events • the strategic direction of the organisation 	General	<input type="checkbox"/>	<input type="checkbox"/>
Table of contents	List the content of the strategic planning documents and relevant page numbers	General	<input type="checkbox"/>	<input type="checkbox"/>
Major assumptions	Clearly detail all assumptions made to determine goals, objectives, strategies and action plans	General	<input type="checkbox"/>	<input type="checkbox"/>
Critical success factors and issues facing the organisation	Discuss the factors that significantly impact upon the organisation's ability to be successful	Now	<input type="checkbox"/>	<input type="checkbox"/>
Organisation history	A short overview of historical milestones and past successes of the organisation	Now	<input type="checkbox"/>	<input type="checkbox"/>
Vision of the organisation	<p>The organisation'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, etc. 	Where	<input type="checkbox"/>	<input type="checkbox"/>

Strategic Plan Section	Context	Now, where, how model reference	Yes	No
List of goals and objectives over the long term	Simply state the organisational 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.	Where	<input type="checkbox"/>	<input type="checkbox"/>
Tables identifying key performance areas, goals, objectives, strategies and action plans	A simple tabular section that details strategies and action plans to be implemented with the view to achieving long term goals and objectives	How	<input type="checkbox"/>	<input type="checkbox"/>
Management structure	An organisational chart showing the relationships between different areas of the organisation such as the board, committees and management	Now	<input type="checkbox"/>	<input type="checkbox"/>
SWOT analysis	An analysis of the strengths, weaknesses, opportunities and threats that exist within the current environment	Now	<input type="checkbox"/>	<input type="checkbox"/>
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 strategic plan • Statement of cash flow 	Where/Now	<input type="checkbox"/>	<input type="checkbox"/>
Appendices	Relevant supporting information	General	<input type="checkbox"/>	<input type="checkbox"/>

Director Checklist Points to remember

Developing a strategic plan

Please tick the box if you have read and understood the information relating to each question from the previous section.

Setting the context – organisational characteristics

Depending upon the type of organisation, legal structure and workforce participation, and the involvement in development, implementation, monitoring and modifications to strategic plans will vary.

The role of the board in strategic planning

Broadly speaking the role of a board in strategic planning is to:

- approve strategy being developed
- monitor progress against the strategic plan on a regular basis

The role of directors in strategic planning

A director's role in strategic planning may include:

- participation in strategy development
- implementation/assisting in implementation
- monitoring and evaluation of progress.

Who else should be involved in strategic planning

All key personnel should be involved in the strategic planning process.

Stakeholder needs analysis

A stakeholder needs analysis should be completed prior to the development of a strategic plan.

Components of a strategic plan

The components of a strategic plan will depend on the size and other characteristics of the organisation.

3. Implementing your strategic plan

3.1 Communication

Your strategic planning document demonstrates to stakeholders, funding bodies and prospective members that your organisation has a future and a management team who are planning for the future. It should be easily accessible to all stakeholders who are interested in the direction the organisation is taking.

You may wish to distribute a copy of your strategic plan to all your members or use communication media such as a web page, email or meetings to distribute the information to interested parties.

It is important that roles and responsibilities are well communicated to ensure that the strategic plan is successfully implemented within agreed timeframes. Prior to beginning your action plan it may be of benefit to answer the following questions.

3.2 Communication responsibilities matrix

To be completed annually by the board for each key performance area.

Question	Answer	Action
Who is responsible for implementation of the strategic plan?		
Who is responsible for the achievement of goals and objectives?		
Who is responsible for evaluating performance against goals and objectives?		
How often will you review your strategic plan and ensure that your action plans are achieving your stated goals and objectives?		
How are you going to distribute your strategic plan to relevant stakeholders?		
How are you going to communicate progress against your strategic plan to relevant stakeholders?		

3.3 Communication responsibilities checklist

Directors Note

This checklist should be used by new directors on appointment and by the board annually when reviewing strategic plans.

The following checklist will help with determining your understanding of your organisation's strategic plan.

Question	Yes	No	Action
Do you have a clear understanding of where your organisation is going over the next 3 - 5-year period?	<input type="checkbox"/>	<input type="checkbox"/>	
Do you understand how and why goals and objectives have been developed?	<input type="checkbox"/>	<input type="checkbox"/>	
Do you understand your role and responsibilities with regard to the implementation of the strategic plan?	<input type="checkbox"/>	<input type="checkbox"/>	
Do you understand the implementation process?	<input type="checkbox"/>	<input type="checkbox"/>	
Do you know how often status updates will be done?	<input type="checkbox"/>	<input type="checkbox"/>	
Do you know the timeframe within which each target is to be met?	<input type="checkbox"/>	<input type="checkbox"/>	

If you have answered no to any of these questions it may suggest that communication issues exist that will need to be resolved before implementing your strategic plan.

As with most planning activities strategic planning is a process most effective when followed up by an agreed process of monitoring and evaluating, as shown on the following sample implementation plan.

Whilst strategic planning is generally an annual process, implementation, monitoring and modifying plans can be done daily, monthly or quarterly as appropriate depending upon the organisation.

Within your SSO you may choose to complete the strategic planning process at your annual board meeting and present your strategic plan to your members at your annual general meeting.

3.4 Implementation plans

Implementation plans should be completed soon after the strategic planning process has been completed. Implementation plans simply state the following:

- key performance areas (KPA)
- each goal
- each objective
- strategy developed
- people responsible for taking
- action
- dates by which actions must
- be completed
- progress reports.

Implementation plans should be seen as working documents that should be reviewed at regular intervals.

3.5 Making it happen

Many organisations find it difficult to implement some of the strategies developed through their strategic planning process.

This can be due to:

- assigning responsibilities to personnel who do not have the time or skills required
- lack of communication
- not completing the monitoring and evaluation phase on a regular basis
- accountability.

When assigning tasks from the implementation plan to personnel, ensure that you have considered the time required to be invested and the skills required to successfully complete the task. Prior to assigning tasks it may be of benefit to complete a training needs analysis to better understand the skills of relevant personnel.

All relevant stakeholders must be made aware of the strategic plan, and action/implementation plan.

Relevant stakeholders may include:

- board members
- committee members
- management team
- other personnel who are responsible for outcomes.

Key personnel must have a clear understanding of:

- what the organisation is doing over the next 3-year period
- why and how goals and objectives were developed
- their responsibilities in the implementation of the plan
- the complete strategic planning process.

Individual directors and/or key personnel may be asked to complete the following statement to make sure they understand their responsibilities. The statements could then be collated and reviewed periodically as part of the implementation plan.

My responsibilities in strategic planning include the following:

1.
2.
3.
4.
5.
6.
- .

3.6 Planning guide

Before you start your planning exercise, these questions should be answered to make sure everyone has a united goal for your SSO with developing the plan.

1. Briefly describe what goes into a strategic plan
2. Why is a strategic plan important for your SSO?
3. Identify the advantages of developing goals, objectives and strategies for your SSO
4. Sketch an outline for your strategic plan
5. What sort of information do you think is relevant for your strategic plan?
6. Determining your mission and vision

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

“A mission statement is one that truly reflects the deep shared vision and values of everyone within the organisation and creates a great unity and tremendous commitment. It creates in people’s hearts and minds a frame of reference they have bought into...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 SSO is now?

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

Our mission encapsulates

- the overall objective of our SSO
- our unanimity of purpose
- attitudes and outlook
- reason our SSO exists
- our philosophy and purpose.

Understanding the uniqueness of our SSO. It is important we have some understanding of the things, which help to set our SSO apart from other sporting or recreation SSOs. 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 SSO

The SSOs norms

What the SSO 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 SSO to achieve in the future.

From determining our mission and our vision we can then move on to forming a mission statement. Many SSOs have a central mission statement, then each key performance area may write their own individual mission statement in keeping with the central mission statement.

3.7 Understanding the environment

Before writing your plan, you need to understand the environment in which the SSO operates. One technique for doing this is called SWOT analysis. It is a review of the strengths, weaknesses, opportunities and threats to your SSO.

To complete a SWOT analysis, use the worksheet below, identifying all the:

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

Internal Environment	Strengths	Weaknesses
External Environment	Opportunities	Threats

3.8 Problems for directors in the strategic planning process

As a director, your role will involve dealing with many of the problems that may arise throughout the planning and implementation process. The following points highlight some of these problems and direct you to potential solutions or areas of this resource that may assist in resolution.

Problem	Potential Solution
Change in board and management staff leads to lack of familiarity with the plan, its key strategies, and the implementation requirements.	Consistent and regular communication of this information will minimise this problem. The section earlier in this module on communication may provide ideas on how to do this.
Differing objectives and opinions between national, state and regional bodies may make general acceptance of the plan difficult.	Again, communication is the key. Asking for (and accepting) feedback on the draft plan may assist in general take up of the plan. This request for feedback should be ongoing e.g. Some organisations provide their plan on their website and invite feedback. Another area to consider is whether all the key stakeholders have been provided with the opportunity for input into any section of the plan that affects them. Stakeholder views can be captured in a number of ways including via surveys, calls for submissions, steering groups.
Directors and board members lack the time to prepare a relevant strategic plan, and end up with a largely generic plan that does not address key issues.	Whilst it is true that a few days set aside for strategic planning should produce a well prepared, relevant plan, a good strategic plan can be produced in a much shorter time frame with good facilitation and structure in the planning process. It is also important to recognise that the whole plan does not have to be reconstructed each time. There may be many sections of a prior plan that remain applicable to your organisation. Care should be taken however, to ensure that new issues are considered rather than just updating existing material.
Tasks in the plan do not seem to be getting accomplished.	The board needs to ensure that responsibility for follow up is allocated and actioned. In many cases the original time frame set may be missed, and the responsible board member needs to reassess an appropriate time frame and communicate this to the board and the relevant organisation members.
Issues arise that result in the plan being no longer appropriate.	There will be very few occurrences that will change the strategic direction of the organisation. If such occurrences do arise, the plan can be changed to reflect the new situation. It is very common for implementation plans to require modification. Directors and boards should not be hesitant to change specific actions, responsibilities and timeframes if required. Changing an operational action does not constitute changing the strategic direction of the organisation.

Director Checklist Points to remember

Implementation

Please tick the box if you have read and understood the information relating to each question from the previous section.

Communication

You may wish to distribute a copy of your strategic plan to all your members or use communication media such as web pages, email or meetings to distribute the information to interested parties.

Assigning responsibilities

Roles and responsibilities must be well communicated to ensure that the strategic plan is successfully implemented within agreed timeframes.

People who have accepted some of the roles and responsibilities as stated in the implementation plan must be made aware of the process to be used to monitor and evaluate performance against the strategic plan.

Implementation plans

The implementation plan is a working document that needs to be reviewed at regular intervals.

4. Monitoring and evaluation

Monitoring and evaluation of your strategic plan can be done daily, monthly or quarterly as appropriate. Depending upon the target dates set in the implementation/action plan. A formal status update session should be run by the board/management committees on a regular basis to ensure that management has a good understanding of activities being undertaken. A sample agenda for the status update session has been included below.

XYZ ORGANISATION STATUS UPDATE		
Agenda		
	RESPONSIBILITY	REFERENCE TO STRATEGIC PLAN
Welcome	Chairperson	
KPA 1		
<ul style="list-style-type: none"> • Targets achieved through the month • Progress towards goals & objectives • Progress against timelines • Resource requirements • Improvements to planning processes 	Mr Xyz	Section 2.1
KPA 2		
<ul style="list-style-type: none"> • Targets achieved through the month • Progress towards goals & objectives • Progress against timelines • Resource requirements • Improvements to planning processes 	Ms Abc	Section 2.2

4.1. Monitoring and evaluation checklist

Key questions that should be asked while monitoring and evaluating the status of your organisation's implementation/action plans, and some possible director issues:

Question	Yes	No	Director issue	Actions
Are targets being met?	<input type="checkbox"/>	<input type="checkbox"/>	Where targets have been met, celebrate your success. Acknowledge the effort that has been expended to achieve the set target and communicate your successes throughout your organisation. Positive reinforcement will stimulate interest in your strategic plan and participation from other stakeholders within your organisation.	
Will the goals/ objectives set be met as a result of meeting targets?	<input type="checkbox"/>	<input type="checkbox"/>	Targets stated in your implementation/action plans were developed with long-term goals and objectives in mind. If there is any suggestion that your targets will not result in your organisation achieving its goals and objectives you must review your action plan and consider changing it to include targets that are aligned to achieving your goals and objectives.	
Will the goals/ objectives set be met according to the timelines specified in the strategic plan?	<input type="checkbox"/>	<input type="checkbox"/>	Where it appears that your organisational goals or objectives will not be met within the time frames specified in your strategic plan you may wish to consider a revision of your action plan or a revision to your strategic plan. Before making this decision however, it is important to understand <i>why</i> organisational goals and objectives are not going to be met within specified time periods.	

Question	Yes	No	Director issue	Actions
Do personnel have the necessary resources to achieve stated goals and objectives?	<input type="checkbox"/>	<input type="checkbox"/>	Often the underlying reasons why goals and objectives are not met within stated timelines is a lack of resources. Scarce resources that may not be available include human resources, funding and skills. Where goals and objectives are not being met as a result of a lack of resources, consideration should be given to developing necessary strategies to obtain relevant resources. There may also be the need to amend timelines surrounding goals and objectives in order to make the targets more realistic.	
Are the goals and objectives stated realistic?	<input type="checkbox"/>	<input type="checkbox"/>	Goals and objectives that are not realistic will need to be revised as soon as it is noted that they are not achievable. Unrealistic expectations can have the long-term effect of demotivating stakeholders and can be counterproductive.	
Can we improve our future planning processes?	<input type="checkbox"/>	<input type="checkbox"/>	Throughout the monitoring and evaluation stage consideration should be given to improvements that can be made to the process by which goals/objectives and targets are established.	

4.2. Modifications

Modifications to your strategic plan or implementation/action plan may be required. When this occurs it is important to note that deviations from the plan are a natural occurrence. Such changes demonstrate your awareness of changing conditions. In essence you are simply realigning your strategies or action plans to meet the needs of a dynamic environment. Some key questions that should be asked when making such modifications are:

QUESTION	ANSWER
What has highlighted the need to modify your plan?	
Why are you modifying your plan?	
What will you achieve through modifying your plan?	

If you are satisfied that the modifications to your plan must be made in order to meet realistic goals and objectives, ensure your implementation/action plan is updated. You may be required to reassign responsibilities and communicate these requirements through the implementation plan shown in previous sections of this module.

Director Checklist Points to remember

Monitoring and evaluation

Please tick the box if you have read and understood the information relating to each question from the previous section.

Monitoring & evaluation

The implementation plan must be monitored at regular intervals.

Key questions

Key questions that need to be answered when monitoring progress against the implementation plan includes the following:

- Are targets being met?
- Will goals and objectives set be met as a result of achieving targets?
- Will the goals and objectives set be met according to the timelines specified in the strategic plan?
- Do personnel have the necessary resources to achieve stated goals and objectives?
- Are the stated goals and objectives realistic?
- Can we improve our future planning processes?

5. Using a consultant

There are many consultants who specialise in the development and implementation of strategic plans. Potential advantages of using consultants can include:

- The specialised knowledge they can bring the organisation
- Objectivity - a fresh perspective
- The ability to drive the process to completion and delivery of the strategic planning document
- They bring information and best practices from other companies
- They can provide a transfer of knowledge to the organisation.

Some potential disadvantages include:

- A lack of ownership of the plan from the management team or board
- Cost.

Should you choose to engage the services of a consultant to assist you in the development and implementation of your strategic plan consider the following in the selection of a consultant, be clear and specific regarding the work you want the consultant to complete. A short scope document can assist both the consultant and the organisation to clarify their expectations.

Consider documenting the following in the scope:

- What do you want the consultant to do?
- When do you want the work to be completed?
- How often would you like progress reports?
- Who within the organisation is responsible for managing and reviewing the consultant's work?

Ask the consultant for references. Contact previous clients that the consultant has worked for and obtain an independent perspective of the quality of their work.

Meet with the consultant and select a consultant who has excellent communication skills.

Discuss the consultant's experience with other Not for Profit organisations within the sport and recreation industry.

5.1 Consultant pre-engagement checklist

Directors Note

This Checklist Should be used by the board when engaging a consultant.

Question	Yes	No	Action
Have you reviewed the consultant's references?			
Has the consultant shown strong communication skills?			
Does the consultant have some experience in the sport industry?			
Will the consultant assist in the implementation of the plan?			
Have you been clear and specific regarding what you want the consultant to do?			