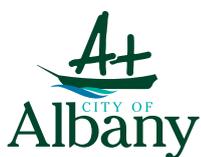


Smart Clubs

Introduction to Business Planning Toolkit



Department of
Sport and Recreation

*Improving Club Governance
& Facility Management*

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How to use this 'Introduction to Business Planning' Toolkit

The toolkit provides a basis for your club to develop an 'Introduction to Business' Plan.

This toolkit is designed as a 'one-size-fits-all' resource for clubs within the City of Albany and is likely to require each club/association to modify the resource to best suit their individual needs.

The 'Introduction to Business Planning' Toolkit includes:

- Introduction to Business Planning Workbook
- Simple Strategic Planning template
- Asset Management planning templates
- Financial Management planning templates

Stage 1 involves a committee working through a series of questions within this workbook. Encourage the committee to include representatives who hold different roles within the club to ensure a cross section of interests is catered for in the long term planning approach.

Once these questions have been completed and the group is happy with the outcomes you can then move on to the second stage of this process. The information collected in this Workbook also provides a useful 'ready reference' of key information on the club or association.

Prompts are provided in red, to assist the committee work through the Workbook.

Stage 2 involves transferring the appropriate information into the 'Introduction to Business' Planning templates.

It is important to remember that your club is always changing and your plan needs to be reviewed and updated. It is essential that everyone around the club is familiar with the plan so they can be working together to achieve the common goals.

The City of Albany's Smart Club Officer is more than willing to support your club/ association in either the development of your inaugural business plan, update of an existing plan or provide assistance in the completion of an existing plan.

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Geoff McNeill

Enterprise Care Consulting Group (2002) Inspired Strategies: The Secrets to Developing Not for Profit Strategic Plans that Work, www.enterprisecare.com.au

Shire of Jerramungup Sport Club Business Plan Template

City of Gosnells Business Plan Template

Rebecca Cotton (2011) Art and Science of Strategic Planning, Video Conference Notes, Injury Control Council of WA

Useful Links

Australian Sports Commission: www.ausport.gov.au/clubs/

Australian Sports Commission Play by the Rules: www.playbytherules.net.au/

Department of Sport and Recreation WA:

www.dsr.wa.gov.au/organisationaldevelopment

www.clubsonline.dsr.wa.gov.au/

Sports Community Website www.sportscommunity.com.au/

Background Questions and Directions

Introduction

The role of this document is to simplify the process of developing a Business Plan for your sport or recreation club within the City of Albany. Business plans are a great tool for clubs to plan their long-term viability and develop and maintain their facilities and programs.

Planning helps to:

- Review your clubs background and history,
- Identify where your club is at now and where they would like to be in the future
- Bring order into the hectic business of running your club
- Identify the main goals for your club
- Encourage the members to get involved
- Adjust to changes in the current environment that may have an impact on your club
- Ensure that resources (human, physical and financial) are used effectively
- Assist your club with managing your assets
- Provide clear and transparent directions for 'future proofing' your club
- Build a strong case for funding applications and sponsorship support

What type of planning?

Like many things there is no right or wrong way to prepare a Plan. They can incorporate Strategic Plans, Business Plans and Operational Plans. They can vary from a few pages to a fully laid out document with images, charts and diagrams. They will reflect the size and scope of your organisation as well.

What is a 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/organisation.

While there is no specific format or contents for a Business Plan (generally this is related to the type of business), in general terms it 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.
- Asset Management Plan – details of the assets owned by the organisation and plans and budgets for the maintenance. May also include long-term planning for future assets.
- 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. They are more often developed by the commercial sector and well-resourced non-commercial organisations.

If your club is new to preparing a Business Plan we suggest that you keep it simple at first. The plan can grow and evolve over time as your organisation develops.

The City of Albany's '**Introduction to Business Planning**' includes the following:

- Simple Strategic planning and action planning
- Asset Management planning
- Financial Management planning

As an introduction, it provides a basic framework and starting point for your club/association to:

- review your **current governance practices**
- review your **asset management plans**
- plan for successful **financial management**
- update your documentation and
- help your Executive committees to make great decisions

Who should be involved in the planning process?

Try to involve as many people in the planning process as possible. The more people who are consulted in the development of the plan, the more it will reflect the true direction of your organisation. Your members will also feel that the plan belongs to them and they will be more comfortable in assisting with its implementation.

A group of people should be invited to a planning meeting to brainstorm the basics of the plan. This group should be representative of:

- Board/ committee members
 - Sport participants (juniors, seniors, social, competitive)
 - Coaches
 - Officials
 - Parents
 - Volunteers
 - Paid staff
 - Facilities operators
 - Sponsors
 - Other stake-holders in your organisation
- Representative from your Local Government, i.e. Smart Club Officer.

After the planning meeting, the draft plan should be circulated as widely as possible to your members to make sure that it reflects their needs.

When should you plan?

You will need to set aside a specific time-slot in your schedule (perhaps 2- 3 short sessions) for your planning meeting. The meeting should be long enough to develop the basic framework of the plan so the duration will depend on the size and complexity of your club/ association. It is preferable this occurs during the pre-season (or off-season) so that your club starts their year with a clear direction.

The planning pathway

Form a planning committee

A small group of committed people should get the planning process under way and ensure the plan is implemented and reviewed regularly.

Hold a planning workshop

Invite a group of people (including administrators, coaches, officials, athletes, sponsors, facilities managers and councils Club Development and Funding Officer) to attend a planning meeting to develop the framework of the plan. A facilitator, or a person who is experienced in leading planning workshops, may assist your organisation to get the most out of the workshop.

Develop your plan

The planning committee or an entrusted individual writes up your plan. The pages provided in this document are a guide only and sections may be removed or added at the discretion of your planning committee. It is important to remember to keep it simple.

Consult with your members

- Make sure that your members understand your plans.
- Remember that it is their plan too.
- Make any necessary changes to the plan.

Promote your plan

- Make sure your new plan gets plenty of publicity – put it in your newsletter, send a copy to sponsors.
- It's your plan – you should be proud of it.
- The more you promote the plan, the more people will know about it and help you to implement it.

Deliver it

- There's no point in developing a plan that will gather dust on the shelves.
- Make your plan a 'living, breathing document' that helps people to get the job done.
- Ensure the plan is a set agenda item on your committee meetings
- Review it and modify it if necessary – it may not be exactly what you want or can achieve first time around.
- At least once a year, your planning committee should reconvene to review what has been achieved

Celebrate success

As strategies in the plan are achieved, let everyone know about it, no matter how small.

Signature Page

It is always important to ensure key personnel are committed to the plan. Empower them by encouraging their input into the planning process and signing this signature page once the contents are agreed upon.

Modify this table to reflect your organisational structure.

The 'Introduction to Business' Plan has been developed, agreed to and signed off by the following representatives of (name of club/ association):

| The Board/Committee | Portfolio/Position | Signature |
|----------------------------|---------------------------|------------------|
| 1. (name) | eg President | |
| 2. | Vice President | |
| 3. | Treasurer | |
| 4. | Secretary | |
| 5. | | |
| 6. | | |
| 7. | | |

The 'Introduction to Business' Plan should be regularly reviewed and updated.

Use the table below to record when this was undertaken

| Date | Action | Position | Signature |
|-------------|---------------|-----------------|------------------|
| | Endorsement | eg President | |
| | Amended | | |
| | | | |
| | | | |
| | | | |

Club Details

Fill in this short summary of your clubs important details:

Club Name

Establishment Date

Club Address

Postal Address

Club Phone Number

Email Address

Web page

ABN Number

Incorporation Number

Period Covered by Plan

Vision/Mission of the Club/Association

Vision statement

A vision statement should inspire a team to DREAM. It should outline what the club/ association wants to be. A vision statement will be one or more short phrases that convey the hopes for the future. A vision statement should be:

- Understood and shared by all members
- Broad enough to include a diverse range of perspectives
- Inspiring and uplifting
- Easy to communicate

Examples of a Vision Statement:

- **Skate Australia**

To be viewed as an inclusive & progressive sporting organisation, distinguished for engaging and retaining skate participants.

- **Nike**

To bring inspiration and innovation to every athlete in the world. If you have a body, you are an athlete.

- **Drummoyne Sailing Club**

To be recognised as a vibrant and respected sailing club encouraging participation in sailing through all age groups.

- **Geelong Football Club**

To be the greatest team of all: a club people can be proud of because of how we play the game, live our values, conduct business and engage with the community.

List your clubs/ associations Vision statement.

Mission statement

A mission statement should inspire and encourage a team to ACT.

A mission statement will describe WHAT the club/association is generally going to do and WHY

Examples of a Mission Statement:

- **WA Volleyball**

WA Volleyball will be recognised as the primary provider of quality volleyball products and services for its members and potential members in WA, and acknowledged as a leading sporting organisation in terms of administration, development, participation, performance and profile.

- **Surfing Australia**

We will grow Surfing's position and profile through successful working relationships with stakeholders; innovative thinking; the performance of Australian athletes; and a dynamic management team delivering world's best surfing programs

- **Eaglemont Tennis Club**

To become the elite junior development program in Australia, and to make Eaglemont Tennis Club the strongest club in the NEJTA in terms of junior participation and retention

- **McDonalds**

McDonald's aims to be the world's best quick service restaurant experience. Being the best means providing outstanding quality, service, cleanliness, and value, so that we make every customer in every restaurant smile.

- **Great Southern Sports Talent Association**

GSSTA supports talented regionally based athletes, allowing them to continue their development and progression along their athletic pathway while remaining at home.

List your clubs/ associations Mission statement.

Values of the Club/Association

Club values are an important area to cover in your planning as they define what your club believes in and what kind of behaviour is expected from all those involved. Core values are timeless, guiding principles that can build the foundation for culture and communication.

Examples of a Values Statement:

- **Higgins Park Tennis Club**

To promote and advance the game of tennis by providing and maintaining control of suitable grounds and premises for the playing and practice of the game.

To promote sporting etiquette, gamesmanship, and fair play in a family friendly social environment.

- **Netball Australia**

Passion, Teamwork, Integrity, Excellence and Accountability

- **Geelong Football Club**

Precision – we seek excellence in everything that we do and always look for ways to improve
United – we are selfless, we support and care for each other and we collaborate across our club
Respectful – all people are treated with respect regardless of their background or position

List your clubs/ associations 3-4 core values.

1.

2.

3.

4.

Club/Association Goals

This is a list of 6-8 broad statements about different goals the club wishes to accomplish in the future. Think of these in terms of the long term success of the club and they could be from key areas such as: facility management, membership, participation, governance, people management, financial management, marketing/promotion, education, volunteers, community.....

Your goals need to be short and provide a strategic direction for the club.

(Note: if your committee has experience in strategic planning/project management you might find some of the terminology varies, depending on the sector and experience. Don't worry too much, just follow the simple process, the prompts and your plan will be a useful tool for all members of your Executive.)

Examples of Goals:

- To increase the number of junior participants in the sport
- To provide opportunities for all members of the community to participate in basketball
- To increase general community use of our Sporting Facility
- To increase the level of professionalism, transparency and consistency within our club

List your clubs/ associations 6-8 broad goals.

1.

2.

3.

4.

5.

6.

7.

8.

Continue working through the document. You will come back to this page to help to develop up a simple strategic plan.

Club Planning Checklist *

If your committee is struggling with identifying your key goals, it may be worthwhile for your committee to take 10 minutes to complete the quick Club Planning Checklist

| Aspirational | Rank (out of 10) | Priority? | Goal/Strategy |
|---|-------------------------|------------------|----------------------|
| <i>How clearly defined are your clubs goals and objectives</i> | | | |
| <i>How well does your club promote their clubs goals, values to the members?</i> | | | |
| <i>How well does your club regularly review/analyse where they are heading and what they have achieved?</i> | | | |
| <i>How well defined is your club culture?</i> | | | |
| Governance | Rank (out of 10) | Priority? | Goal/Strategy |
| <i>How well does your club comply with all legislative obligations and requirements?</i> | | | |
| <i>How well do your club committees and/or portfolios function?</i> | | | |
| <i>Are your Executive Committee positions well defined?</i> | | | |
| <i>How well does your club identify and manage their risks?</i> | | | |
| <i>How well aligned is your club with your regional and/or state body?</i> | | | |
| Financial Management | Rank (out of 10) | Priority? | Goal/Strategy |
| <i>How well does your club manage their finances?</i> | | | |
| <i>How well do you report your financial position to members?</i> | | | |
| Asset Management | Rank (out of 10) | Priority? | Goal/Strategy |
| <i>How well does your club manage their current assets?</i> | | | |
| <i>How well does your club plan for their assets into the future?</i> | | | |
| <i>How well do you think your club has" future proofed" itself for emerging trends?</i> | | | |

You may also want to consider the following key result areas:

- *Participation*
- *Membership*
- *Competition*
- *Marketing*
- *Sponsorship*
- *People development*
- *Community*
- *Volunteers*

** Adapted from Sports Community Strategic Planning Questionnaire: www.sportscommunity.com.au/resources/*

Committee of Management of the Club/Association

What is your committee structure? Please list your current committee of management, plus their names, positions and responsibilities. This information can be helpful if you wish to draw an organisational chart or want to generate job descriptions for committee members. Include any sub-committees or portfolio's.

| Position | Name (optional) | Responsibilities |
|-----------------------------|-----------------|------------------|
| President | | • • |
| Vice President | | • • |
| Treasurer | | • • |
| Secretary | | • • |
| Registrar | | • • |
| Fundraising and Sponsorship | | • • |
| Competitions | | • • |
| Marketing and Promotions | | • • |
| State/Regional Delegate | | • • |
| Canteen | | • • |
| Bar Manager | | • • |
| General Committee | | • • |
| General Committee | | • • |
| Portfolio - | | • • |
| Portfolio - | | • • |
| | | |
| | | |
| | | |
| | | |

Membership Trends

Fill in the table below listing:

- The categories of membership (i.e. junior, adult, senior, social, life members)
- The membership numbers for the current year, past two years .
- The projected 2-3 years are the desired membership numbers the club is striving to achieve.

| Membership Category | This Year | Last Year | Previous Year | Projected Year1 | Projected Year 2 | Projected Year 3 |
|--------------------------|-----------|-----------|---------------|-----------------|------------------|------------------|
| <i>eg Junior Members</i> | 110 | 90 | 90 | 120 | 125 | 130 |
| Junior Members | | | | | | |
| Senior | | | | | | |
| Social | | | | | | |
| Association | | | | | | |
| Life Members | | | | | | |
| Male/Female | | | | | | |
| | | | | | | |
| | | | | | | |
| Total members | | | | | | |

In which areas/suburbs do most of your members live? Note: Approximately 80% of members of sport and recreation clubs reside within 5km of the clubs home ground.

Ideally, how many members would your club like to have?

What is the maximum number of members your club and facility can cater for?

What is the minimum number of members your club and facility can survive with?

SCORE Analysis

The SCORE analysis enables you to identify the strengths (S) and challenges (C) within your club/association and the opportunities (O) and risks (R) across the broader sector. SCORE is similar to a SWOT analysis, with an additional Ethical (E) consideration.

The SCORE analysis has three aims:

1. to help identify where the club/association is at;
2. to prepare the club/association to develop a plan that will utilise their strengths, manage their challenges, take advantage of opportunities and minimise any risks;
3. while working within a framework of the values of the club/association.

Almost every organisation displays at least 2-3 exceptional advantages (strengths) and disadvantages (challenges). The purpose of this step is to identify those internal elements that are so influential that they may affect the destiny of the club/association for many years, or may have played a significant role in the success or failure in the past.

Similarly, identifying the opportunities and risks is a similar process, except that the elements are not internal, but external. This analysis identifies the trends and events that are likely to have an impact on the club/association.

To assess the Ethical consideration ask the following question: Are there any issues of right, obligation, fairness, relationships or integrity involved? Consider in relation to the values of your club/association. (eg An opportunity for a junior soccer club may be a major sponsorship deal with a fast food chain with the reward of a 'pie and coke' after every game for every player. How does this sit ethically with your Executive Committee?)

Strengths (internal)

- What are the advantages of your club/ association?
- What do you do well? (what do you brag about?)
- What have been the highlights for your club?

Challenges (internal)

- What could be improved?
- What is done badly? (what's embarrassing?)
- What should be avoided?
- What should you be doing that you can't/don't do well?

Opportunities (external)

- What good choices are you facing?
- What are the next steps?
- What are the trends in your community?

Risks (external)

- What obstacles or threats do you face?
- What are other clubs/ associations doing? What are they planning?
- What other sports or activities may have an impact?
- What are your sponsors doing? What are their plans?
- Are the required specifications for your services changing?
- How is the demand for your services? Are your clients less satisfied or more satisfied?

Ethical - Are there any issues of right, obligation, fairness, relationships or integrity involved?

SCORE Template

| | Helpful To achieving the objective | Harmful To achieving the objective |
|---|--|---|
| Internal origin Attributes of the organisation | Strengths <ul style="list-style-type: none">•••••••• | Challenges <ul style="list-style-type: none">•••••••• |
| External origin Attributes of the environment | Opportunities <ul style="list-style-type: none">•••••••• | Risks <ul style="list-style-type: none">•••••••• |

Additional Ethical Considerations:

1

2

3

Strategic Planning Template

Example: Key Result Area: Facility Management

Goal – To operate a professionally managed club facility

| Outcome | Strategies (Actions) | Performance Indicators (Results) | Priority | Date | Who | Cost |
|--|---|---|----------|--|-----|-------|
| Established operational policies and procedures | 1. Develop Operational manual for the club facility, incorporating Membership policy, RSA, Bookings, Security, Risk Management, Customer Service | <ul style="list-style-type: none"> Facilities committee established to review existing documentation Draft manual completed Manual endorsed by Executive All key staff (paid and volunteers) are aware of Operations Manual Additional training identified and completed Manual reviewed at end of season | 1 | Jan Feb March Pre-season Ongoing Sept | JC | \$400 |
| Maintain the club facility at a high standard | <ol style="list-style-type: none"> Identify existing building maintenance issues Identify future building maintenance requirements | <ul style="list-style-type: none"> Undertake audit to identify building maintenance requirements (current, future) Maintenance requirements identified Prioritise maintenance program | 3 | Jan Feb Feb | BM | |
| | <ol style="list-style-type: none"> Establish a building maintenance reserve fund Establish fully costed maintenance schedule for next 5 years | <ul style="list-style-type: none"> Maintenance schedule identified and costed Sources of fund are identified Fund is established | | Feb Begin Season | BM | |

Key Result Area: _____

Goal – broad statement of intent

| Outcome | Strategies (Actions) | Performance Indicators (Results) | Priority | Date | Who | Cost |
|------------------------------------|--------------------------------|---|----------|------|-----|------|
| What do you want to achieve | 1. What steps to reach outcome | <ul style="list-style-type: none"> Steps to complete outcome | | | | |
| | 2. What steps to reach outcome | <ul style="list-style-type: none"> Steps to complete outcome | | | | |
| | What steps to reach outcome | <ul style="list-style-type: none"> Steps to complete outcome | | | | |

Key Result Area: _____

Goal – broad statement of intent

| Outcome | Strategies (Actions) | Performance Indicators (Results) | Priority | Date | Who | Cost |
|------------------------------------|---------------------------------|---|----------|------|-----|------|
| What do you want to achieve | 3. What steps to reach outcome | <ul style="list-style-type: none"> Steps to complete outcome | | | | |
| | 4. What steps to reach outcome. | <ul style="list-style-type: none"> Steps to complete outcome | | | | |
| | What steps to reach outcome | <ul style="list-style-type: none"> Steps to complete outcome | | | | |