

Planning 101
Creating our plan for this year
A step by step guide

There is no one planning process for groups to follow. While there are some basic principles or components to help you develop a plan, the plan is only a tool to help you and your organization achieve your priorities and goals. The plan and the process needs to fit your organization. While it would be great for all organizations to have a multi-year long term vision and plan. The reality for many organizations, and particularly local sport clubs that may only operate 4-6 months of the year, is that the time and complexity of some processes may not suit their situations.

The following process is designed to assist community sport clubs/organizations to develop a 12 month plan that identifies focus and priorities for the upcoming year/season. The process can be facilitated with a number of individuals in the organization or completed by key individuals to prepare a draft for further input and conversation with Board members or the general membership.


Key Areas of Emphasis – the initial stage is to identify key areas that your club/organization needs to achieve some results in to be successful. The following keys areas of emphasis is not an exhaustive list but does cover most of the basis areas sport clubs need to direct some attention and/or effort.

- Leadership: (instructors/coaches/program leaders; Board/committee volunteers/other volunteers; officials)
- Facilities: (Game/training)
- Programs
- Fiscal stability
- Communications – internal (members/Board/committees)
- Club culture: (Fun, safe, positive, respect) why do we exist, what is it that we want, what kind of an environment do we want?
- Evaluation: Quality experiences for all (Retention: participants, leaders, CS4L/LTAD)

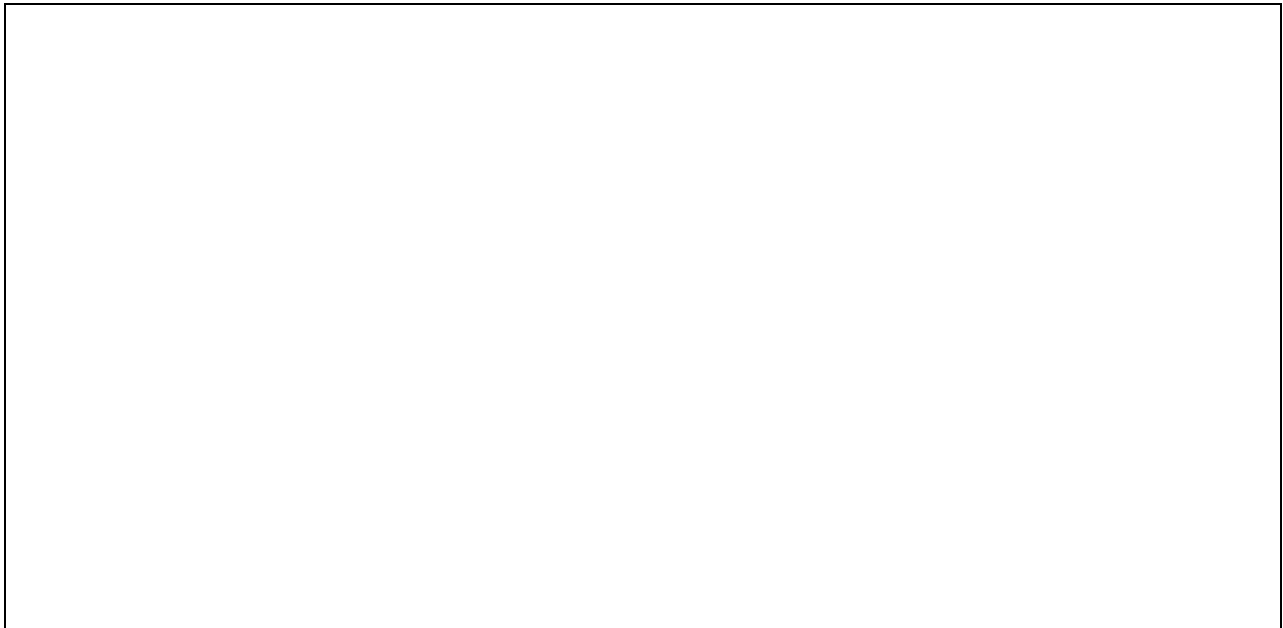
Process: before looking at the key areas of emphasis it is worthwhile to look at what has been positive for the organization and identify challenged the organization may face. Pending on the number of individuals involved you could give the participants the opportunity to complete the questions individual (5-10 min) and then share and record the responses on a flip chart.)

General questions:

1. What has been positive for our organization over the last 2-3 years? What are we doing well



2. What do we need to address/improve upon to strengthen our organization and/or our delivery of programs.



Process: (Once you have selected your key areas of emphasis – either adopted the ones identified or may some additions/deletions have the group complete the questions below. Once again you can do this in the group setting, you may wish to give people an opportunity to complete individually and then share/discuss in the group; or you can simply begin with the group discussing collectively.)

Area of Emphasis: Technical Leadership: (instructors/coaches/program leaders)

What are we currently doing well in this area?

What challenges/issues do we need to address in this area over the next 12 months?

What are our top 3-4 priorities to accomplish in the area over the next 12 months?

Area of Emphasis: Governance Leadership: (Board and committee members)

What are we currently doing well in this area?

What challenges/issues do we need to address in this area over the next 12 months?

What are our top 3-4 priorities to accomplish in the area over the next 12 months?

Area of Emphasis: event/project volunteers

What are we currently doing well in this area?

What challenges/issues do we need to address in this area over the next 12 months?

What are our top 3-4 priorities to accomplish in the area over the next 12 months?

Area of Emphasis: Facilities (game and training)

What are we currently doing well in this area?

What challenges/issues do we need to address in this area over the next 12 months?

What are our top 3-4 priorities to accomplish in the area over the next 12 months?

Area of Emphasis: Programs

What are we currently doing well in this area?

What challenges/issues do we need to address in this area over the next 12 months?

What are our top 3-4 priorities to accomplish in the area over the next 12 months?

Area of Emphasis: Finances/fiscal stability

What are we currently doing well in this area?

What challenges/issues do we need to address in this area over the next 12 months?

What are our top 3-4 priorities to accomplish in the area over the next 12 months?

Area of Emphasis: Communications (internal – members/Board/Committees)

What are we currently doing well in this area?

What challenges/issues do we need to address in this area over the next 12 months?

What are our top 3-4 priorities to accomplish in the area over the next 12 months?

- **Area of Emphasis: Club culture** (Fun, safe, positive, respect) what kind of an environment do we want for our organizations and programs?

What are we currently doing well in this area?

What challenges/issues do we need to address in this area over the next 12 months?

What are our top 3-4 priorities to accomplish in the area over the next 12 months?

Area of Emphasis: Evaluation – how are we doing, are we achieving our desired results, are people enjoying/value our programs and their experiences, How can we improve the experience?

What are we currently doing well in this area?

What challenges/issues do we need to address in this area over the next 12 months?

What are our top 3-4 priorities to accomplish in the area over the next 12 months?

IDENTIFIED PRIORITIES TO ACCOMPLISH (12 MONTHS)

List all of the priorities identified in the previous exercises. At this time keep them listed by area of emphasis. This will probably give you 25-35 priorities, which likely are too many for you to manage at this point. In order to help prioritize where you should put your energies for the next 12 months try the following exercise. Allow each member of the planning group to rate the priorities in the following manner: You get 5 each. You can only use one letter on any one priority.

“C” Critical – we need to achieve these ones – failure is not an option.

“I” - Important – we should really get these done but we can live with it if we don’t.

“NT” – Nice To’s – these would be a bonus but we’re not going to lose any sleep over them.

“W” – Wants – be good if we get them done but we’re not going to put them on the credit card.

Once the group has completed this exercise, give each member the opportunity to rate their top 5 “E’s” – Easy wins – they get us some early successes with limited effort and build our momentum. List the top 5 with the most “C’s”, “I’s” and “E’s” (if some of your C’s and I’s are in your top 5 “E’s” that’s ok – in fact it’s a bonus.. Now you have the basis for your top 10 - 15 priorities for the next 12 months. Have some conversation with the group to see how people feel about the priorities. Are there any concerns? Are there still too many? Do we think there are any C’s we need to add?

Once the group has decided on the top priorities, you can still have the other list in the event that other resources (volunteers etc) become available to step up and take on one of the other items that didn’t make the top list.

Make sure you write each of your priorities as a S.M.A.R.T goal (specific, measurable, attainable, realistic, timely). See appendix A. Once the goals have been established you can have a work group identify the specific action steps to achieve the goals.

WORK STRUCTURE AND ACTION PLANS

Now that you have identified the top priorities for action, it is time to create your work structures and specific action plans. First make sure that you are clear on what the actual priority/goal is: ie, recruit and train 15 new coaches/leaders in the Rally Cap program by July 1st. The next step is to assign that task to an individual or existing work group to develop the action steps and plan to achieve the goal. You may decide to have a committee or work group that may deal with more than one priority and may deal with the key area. The action plans are simply the smaller tasks/steps that need to be taken to achieve the priority/goal. It should identify the steps, who is responsible, our timeline for completion, and any resources required (financial or human) to achieve the goal.

A sample action plan sheet is attached

ACTION PLAN SHEET

Area of emphasis: **Technical Leadership**

Goal: **To recruit and train 15 new coaches/leaders for the Rally Cap program by July 1st.**

Action Steps (What)	Responsibility (Who)	Timelines (when)	Resources required
1. Identify 10 potential leaders from last years registration	Rally Cap Coord	May 15	
2. Recruit 10 potential leaders from new registrations	John Doe	May 25 registration	
3. Confirm trainer, site location, date to host training session	Rally Cap coord	June 1 st	Trainer cost, facility rental, Participant meals
4. Host session – determine if any additional support required by leaders	Rally Cap Coord	June 15	As above
5. Follow up feedback and support to leaders	Rally Cap Coord	Ongoing	

Appendix A

Creating S.M.A.R.T. Goals

Specific

Measurable

Attainable

Realistic

Timely

Specific: A specific goal has a much greater chance of being accomplished than a general goal. To set a specific goal you must answer the six “W” questions:

*Who: Who is involved?

*What: What do I want to accomplish?

*Where: Identify a location.

*When: Establish a time frame.

*Which: Identify requirements and constraints.

*Why: Specific reasons, purpose or benefits of accomplishing the goal.

EXAMPLE: A general goal would be, “Get in shape.” But a specific goal would say, “Join a health club and workout 3 days a week.”

Measurable - Establish concrete criteria for measuring progress toward the attainment of each goal you set.

When you measure your progress, you stay on track, reach your target dates, and experience the exhilaration of achievement that spurs you on to continued effort required to reach your goal.

To determine if your goal is measurable, ask questions such as.....

How much? How many?

How will I know when it is accomplished?

Attainable – When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities, skills, and financial capacity to reach them. You begin seeing previously overlooked opportunities to bring yourself closer to the achievement of your goals.

You can attain most any goal you set when you plan your steps wisely and establish a time frame that allows you to carry out those steps. Goals that may have seemed far away and out of reach eventually move closer and become attainable, not because your goals shrink, but because you grow and expand to match them. When you list your goals you build your self-image. You see yourself as worthy of these goals, and develop the traits and personality that allow you to possess them.

Realistic- To be realistic, a goal must represent an objective toward which you are both *willing* and *able* to work. A goal can be both high and realistic; you are the only one who can decide just how high your goal should be. But be sure that every goal represents substantial progress.

A high goal is frequently easier to reach than a low one because a low goal exerts low motivational force. Some of the hardest jobs you ever accomplished actually seem easy simply because they were a labor of love.

Timely – A goal should be grounded within a time frame. With no time frame tied to it there's no sense of urgency. If you want to lose 10 lbs, when do you want to lose it by? "Someday" won't work. But if you anchor it within a timeframe, "by May 1st", then you've set your unconscious mind into motion to begin working on the goal.

Your goal is probably realistic if you truly *believe* that it can be accomplished. Additional ways to know if your goal is realistic is to determine if you have accomplished anything similar in the past or ask yourself what conditions would have to exist to accomplish this goal.

T can also stand for Tangible – A goal is tangible when you can experience it with one of the senses, that is, taste, touch, smell, sight or hearing.

When your goal is tangible you have a better chance of making it specific and measurable and thus attainable.