

ACTIVE

PLANNING TOOLKIT

DISCOVER THE RIGHT DIRECTION
AND HOW TO GET THERE



OVERVIEW

Planning is the key to the long-term success of a club/code. Whether at a national or local level, your club needs to make long term plans to progress and grow. A structured plan of attack lets you know what changes your club or organisation wants to see, how you think you can achieve those changes and provides a way of checking that your agreed ideas turn into a reality. This allows you to plan your expenditure and prioritise your actions based on the growth you can expect to see. It also helps you monitor and evaluate progress and take each task step-by-step.

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THE PURPOSE



Auckland is a complex multi-cultural environment with many challenges and unparalleled opportunities to increase and sustain participation in sport and recreation. This has led to the establishment of *The Auckland Approach to Community Sport*, a strategic response aiming to create a world-class community sport system in *Tāmaki Makaurau*, community by community. This toolkit has been developed (and will be updated) by Aktive, with input from delivery partners CLM Community Sport, Harbour Sport, Sport Auckland and Sport Waitakere, based on insights and good practice examples from across Auckland.

The purpose of this generic planning toolkit is to provide information, insights and ideas that will assist leaders of clubs/codes to foster successful club activity, through strategic, financial and operational planning. It can be tailored and implemented as each club/code sees relevant.

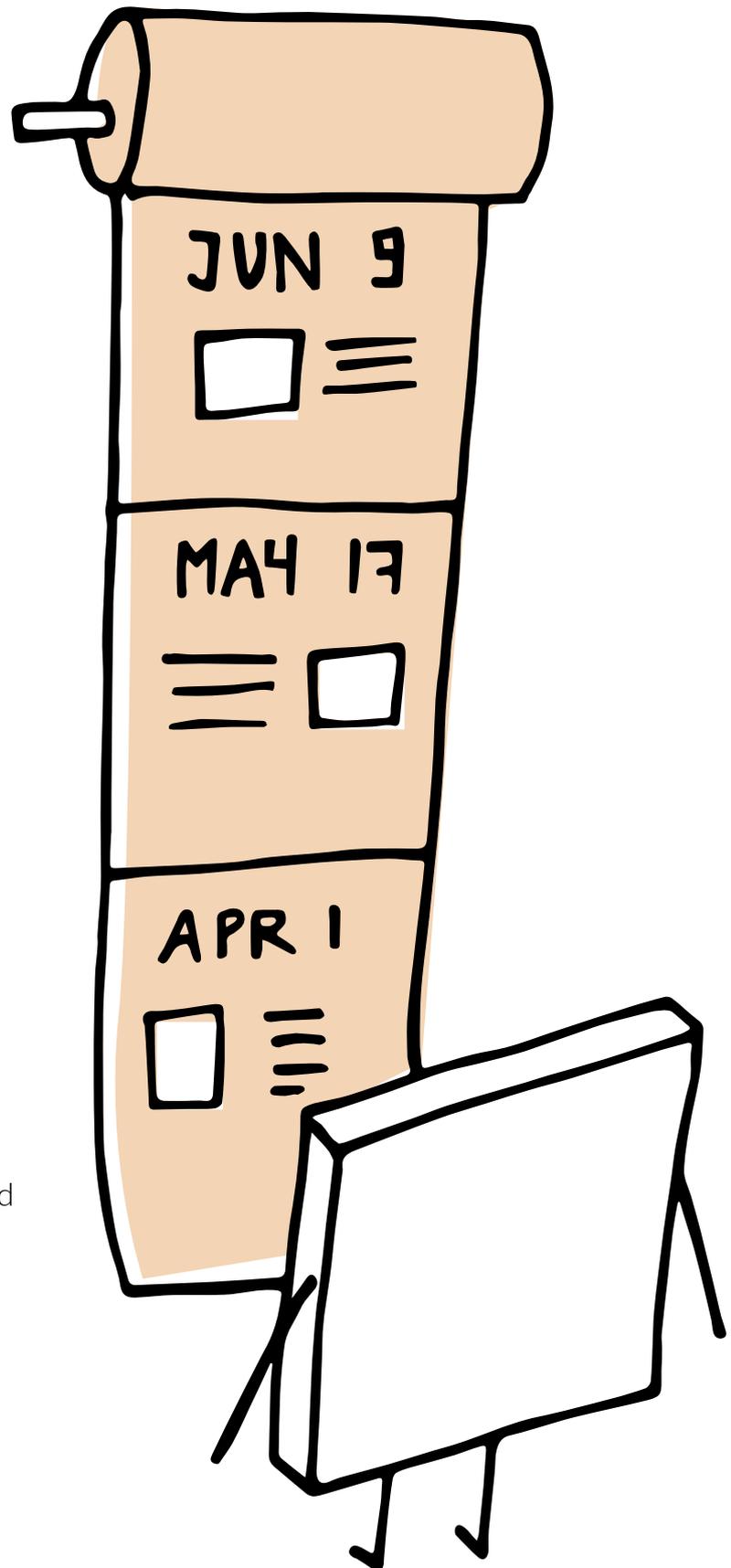
WHY YOU SHOULD PLAN?

To keep up with the needs of your community, you'll need to plan where you are going and how you will get there.

This will enable you to:

- Become proactive rather than reactive - to clarify club purposes and direction
- Initiate and influence outcomes in favour of your club/code
- Exert more control over your clubs'/code destiny - deciding where it wants to be in the future
- Adopt a more systematic approach to change and reduce resistance to change
- Improve financial performance and use resources more effectively
- Increase awareness of your environment (for example other clubs/codes, government policy)
- Improve organisational control and coordination of activities
- Develop teamwork off the field
- Educate and provide information to groups/stakeholders external to your club/code

Without adequate planning, your club/code will likely deal only with immediate problems and may fail to consider future needs. A good plan should be simple, focused and ideally be able to be summarised on one page. It should be clear about your club's path, prioritise outcomes and provide a reference for decision making.



WHAT PLANS SHOULD YOU HAVE?

There are many different types of plans that your club/code could have. Some of the more common ones have been listed below:

STRATEGIC PLAN

A strategic plan is a document that contains the long-term (two to four years) objectives of the club. It lays out the overall purpose and direction of the club and how objectives will be achieved. It also takes into account the strengths and weaknesses, as well as the external opportunities and threats, and outlines some strategies to address these.

OPERATIONAL PLAN

All the tasks to be completed in the short term (within the next 12 months) are separated out of the strategic plan and placed into another document called an operational plan. The operational plan will guide your members or volunteers in their work during this period.

■ Examples of various plans >> 

MANAGEMENT PLAN

This explains the structure of the organisation such as the membership, board structure and staff employed. It may include an organisational chart and constitution or other relevant legal documents relating to ownership of premises. It often includes facility management planning too.

FINANCIAL PLAN

This includes current and projected budgets, cash flows, and details of assets and liabilities. Clubs may also want to look at developing a coordinated fundraising plan.

MARKETING PLAN

This provides information and research related to market demographics, products and services, price structures, delivery of products or services, an analysis of the competition and promotional strategies.

WHO SHOULD BE INVOLVED WITH PLANNING?

In order to get a true representation of your community you should 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. Remember that it is their plan too!

Also consider involving people from your national / regional sports organisations, local council, community groups and schools too. Your local Regional Sports Trust / CLM - Community Sport can also be a good starting point to get this process underway. There may be an opportunity for them to facilitate some discussion within your club on the process and link into other opportunities in the community.

A group of people should be invited to a planning meeting to brainstorm. This group could be representatives including:

- board/committee members
- volunteers
- participants and members
- paid staff
- coaches
- facility managers
- officials
- sponsors
- parents
- other stakeholders
in your organisation

WHEN TO PLAN

It is important to set aside some time for your planning to ensure that it receives the attention it requires. A good time to do planning is in the off season of the club ahead of the next season, or prior to the end of the financial year so the current year's performance can be reviewed and plans are in place for next year. It is probably most economical to schedule your planning meeting with one of your sport's regular gatherings.

This could be a:

- general meeting
- club tournament
- social occasion



You will need to set aside a specific time slot in your schedule (perhaps a day or half-day) 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 organisation.

KEY INFORMATION YOU WILL NEED

Using insights on a regular basis is becoming more and more important to the sport and recreation sector. Used well, insights can give your club an understanding of where it is at, where it is heading and the opportunities that are available by identifying who is playing, who used to play, who isn't playing and more importantly, who could play. Once you have

this information available, you can start putting together solutions to meet the different motivations of the identified leads your club/code could target.

■ [More information link to the Participation and Membership Toolkit >>](#) 

THE PLANNING PROCESS

There is no right or wrong way to prepare a plan.
However, there are some basic elements that should be included:

WHERE YOUR CLUB/CODE IS NOW

~ Benchmark

WHY YOUR CLUB/CODE EXISTS AND FOR WHOM

~ Purpose or Mission

WHAT IT MEANS TO BE A MEMBER OF YOUR CLUB/CODE AND WHAT IS IMPORTANT

~ Culture and Values

WHERE YOUR CLUB/CODE IS GOING IN THE FUTURE

~ Vision

WHAT YOUR CLUB/CODE WILL FOCUS ON DEVELOPING

~ Priorities

HOW YOUR IDENTIFIED OBJECTIVES* ARE GOING TO BE ACHIEVED

~ Actions - who will do what, where and when

HOW AND WHEN YOU WILL MEASURE PROGRESS

~ Success Criteria - to check against your benchmark

*Good objectives are specific, measurable, and realistic and include “doing” words. For example: We will increase club membership by 50 by the end of the year by holding three club open days.



A good idea is to check to see if it all aligns with the national and regional plans for your sport or activity. **Here is a planning process checklist to get you started:**

WHERE YOUR CLUB/CODE IS NOW

- What do our club/code members say?
- What do our financial statements show?
- Who is living in our community or will do in the future?

THE CLUB'S/CODE WHY, WHAT AND WHERE

- Why do we exist and what do we do? (purpose)
- What do we believe in? (values)
- What does our ideal future state look like? (vision)

SETTING STRATEGIES

- What do we want to achieve this season/year?
- Identify short-term and long-term goals
- Set 3-4 goals that reflect the direction of the club
- Use the SMART model when developing the key goals: Specific, Measurable, Achievable, Relevant, Timely

IDENTIFYING ACTIONS

- How are we going to do what we want to do?
- Delegate tasks to specific people in the club/code

ESTABLISHING MEASURES

- How do we measure our success in achieving our goals?
- Key performance indicators will allow your club to mark its achievements and see where it is at in relation to the set goals
- Put completion dates, numbers and quality measures against each goal

IDENTIFY RESPONSIBILITIES, TIMELINES AND FINANCIAL RESOURCES

- The person responsible for each portfolio area is responsible for ensuring the goals are achieved
- Ensure completion times are established to show when a particular result will be achieved by
- Financial indicators need to be identified for all actions. The financial indicators allow the club/code to prioritise

WRITE THE PLAN

- Draft a plan and circulate to other members of the club/code
- An executive summary should be included as an introduction
- Timelines, responsibilities and financial factors should be clearly identified
- The review process should be outlined indicating the ongoing monitoring of the plan

IMPLEMENT/MONITOR THE PLAN

- Ensure that the actual plan is being followed and not just some version of it
- Strategies may need to be modified if personnel change throughout the season/year
- The club/code must monitor progress on a regular basis and be ready to change direction if necessary

REVIEW

- What went well? What did not go so well?
- What was disappointing? What do we feel good about?
- What was a surprise?
- What needs your immediate attention and energy?
- What needs to be refreshed for next year?

PLAN FOR:					
OUR PURPOSE Why our club/code exists and what we do?					
OUR VALUES & BELIEFS How we will behave?					
OUR VISION Where we are going?					
OUR PRIORITIES What we will focus on?	PEOPLE Being friendly and welcoming with quality coaches	PLACES Having clean and well-maintained facilities and training / playing venues	PRICE Offering value for money and fair and equal opportunities		
OUR PLANS What we will do How we will do it Who will be involved When it will happen How much it will cost					
OUR MEASURES How we know we're making progress					
OUR PRIORITIES What we'll focus on	PROGRAMMES Providing a social environment and fulfilling potential	PROCESSES Being professional and well managed	PROMOTION Providing information when needed		
OUR PLANS What we will do How we will do it Who will be involved When it will happen How much it will cost					
OUR MEASURES How we know we're making progress					

To get you started writing your plans we have provided you with some ideas in each focus area later in this toolkit. This has been based on the **Sport NZ Voice of the Participant survey** >> 



PEOPLE

BEING FRIENDLY AND WELCOMING WITH QUALITY VOLUNTEERS AND COACHES

WHAT THIS MEANS...

- The club is open and inclusive in its culture
- The club welcomes new members
- The club is not hierarchical
- The club fosters a culture of approachability, understanding and warmth – all key personnel display these values: make conversation, smile, say hello to each other, invite people in
- All members are encouraged to take part in things
- Everyone is given a fair go at the playing area
- The club provides a safe and welcoming environment for families / children – juniors, youth
- Coaches are knowledgeable, understanding and compassionate
- They are available, patient and supportive
- Coaches have technical expertise
- Coaches can identify the strengths and weakness of players and act accordingly
- They offer constructive criticism
- Coaches offer suggestions / areas for

improvement to players e.g. chiropractor, gym exercises, running coaches for stamina / cross training

- Coaches respecting the individual and their technique – one size does not fit all
- The coaches are good communicators and communicate clearly
- They are passionate and enthusiastic about their sport and share this
- Available for the whole club e.g. workshops and master-classes

WHAT THIS DOESN'T MEAN...

- The club is cliquey / old guard / elitist
- People don't acknowledge or talk to each other
- People get ignored or rebuffed
- Inexperienced and lacking in people skills
- Not interested in developing players
- Not readily available / difficult to get access to them

WHAT we will do	HOW we will do it	WHO needs to be involved	WHEN



PLACE

HAVING CLEANED AND WELL-MAINTAINED FACILITIES AND TRAINING / PLAYING VENUES

WHAT THIS MEANS...

- The playing areas are well-looked after and fit for purpose (e.g. grass cut and courts well marked)
- There is the right equipment, in good condition and there is enough of it (e.g. balls, cones, bibs, nets, etc.)
- Clean and tidy changing rooms – benches, bins
- Hot water
- Large showers
- Appropriate necessities (e.g. hair dryers, heated mirrors)
- Good sized club-room with appropriate facilities (e.g. kitchen, bar)
- Cold drinking water is readily available
- There are good and working kitchen facilities – preparation and wash-up area, dishwasher, kettles, oven, etc. and BBQ for outdoors
- Good and ample parking
- Club bar – alcohol and soft drinks
- Club-room for social activities

WHAT THIS DOESN'T MEAN...

- Dirty changing rooms and club areas
- No hot water
- Damp, leaky and mouldy changing areas
- Lack of or damaged equipment

WHAT we will do	HOW we will do it	WHO needs to be involved	WHEN



PRICE

PROVIDING VALUE FOR MONEY AND FAIR AND EQUAL OPPORTUNITIES

WHAT THIS MEANS...

- Sponsorship – brands / businesses want to be associated with it
- Ability to secure local government funding
- Focusing on people rather than money
- Fees are fair and reasonable
- Details are provided that explain what the fee includes
- Different payment methods and terms are available
- There is a range of flexible and affordable membership categories / packages
- Membership fees are reviewed
- Having a current club membership provides good value for money (e.g. programmes, coaching, uniforms, equipment, support)
- A range of affordable food and drink options are available
- Sound finance processes are in place
- How finances are used is tangible / transparent
- Finances are used to improve the club

WHAT THIS DOESN'T MEAN...

- Finances are a mess
- Too expensive
- Increasing costs are put onto members

WHAT we will do	HOW we will do it	WHO needs to be involved	WHEN



PROGRAMMES

OFFERING A SOCIAL ENVIRONMENT AND OPPORTUNITIES TO FULFIL POTENTIAL

WHAT THIS MEANS...

- Contact and interaction between teams / players – mix things up e.g. men train with women
- Mid-week tournaments
- End of season prize-giving – not just the best performing player but e.g. fair play award, most improved, etc.
- Social events and functions throughout the season e.g. cinema, quiz night, junior quiz, vinyl evening, lip sync, fancy dress, dinners, BBQs
- Events that are alcohol free as well as ones with alcohol
- Include partners / family where appropriate
- Encouraging and supportive environment
- Expert coaching
- Teaching new skills
- Provision of nutritionist, physio, massage, etc. (more serious / competitive players)
- Allow people to challenge themselves against better players

- Asking players what their goals are and helping them to achieve those goals – support, training, coaching
- Mentors e.g. someone to support me as a club member not just as a player
- Recognition when potential is fulfilled e.g. prize-giving
- Competing in events nationally
- Regularly involved in the wider sports area e.g. at regional and national level

WHAT THIS DOESN'T MEAN...

- Isolated approach to players / teams
- No events or out of play activities
- Disinterested in players' development

WHAT we will do	HOW we will do it	WHO needs to be involved	WHEN



PROCESSES

BEING PROFESSIONAL AND WELL MANAGED

WHAT THIS MEANS...

- Well-run (organised and efficient) and financially stable
- Volunteers and staff receive training and support (e.g. mentoring)
- Well-organised induction
- The club makes it easy for new members to feel at ease – buddy system, history of club, tour of facilities, introduction to coaches and managers, supplies contact list
- Transparency – governance, objectives, finances
- Good etiquette on and off the playing area
- Club uniform (if required) – smart and fosters pride
- Caring but firm with the rules
- Strong retention of members and development of new membership
- Don't be restrained by club resources
- Promote safety and comfort
- The club encourages good sportsmanship

WHAT THIS DOESN'T MEAN...

- Inward looking and lacking good organisation
- Obstructive or hierarchical

WHAT we will do	HOW we will do it	WHO needs to be involved	WHEN



PROMOTION

PROVIDING INFORMATION WHEN NEEDED

WHAT THIS MEANS...

- All club members have access to communications
- The club fully informs its members of events and activities and changes to schedules
- The club communicates in a meaningful, relevant and timely manner
- There is consistency in communications
- Communications are concise and accurate
- Communications are two-way e.g. mechanism for members to easily feedback to leadership committee / suggestion boxes etc.
- Ability to choose how I receive e.g. text, email, etc.
- Weekly newsletter during the season – past week’s results, upcoming events, today’s events, information about the club, event opportunities in New Zealand, social events and activities
- Wide range of ways to communicate – face-to-face, text, email, Facebook, Twitter, Snapchat

- Up-to-date website
- Give me information about what is available – give parents information for their kids
- Builds profile – interaction with other clubs

WHAT THIS DOESN'T MEAN...

- Sporadic and inaccurate communications and not timely
- Failure to communicate last minute changes e.g. cancellations, changes of venue
- Conflicting or confusing communications

WHAT we will do	HOW we will do it	WHO needs to be involved	WHEN

WHAT NEXT?

Once you've finished writing your club's/code plan, remember to communicate this with your members so they can see why, how and what they can do to help your club achieve it. Don't forget to treat this as a living document and review and update annually. Encourage feedback from your members.

PROMOTE YOUR PLAN

Make sure your new plan gets plenty of publicity. Put it in your newsletter, on your website and Facebook, and send a copy to sponsors. It is your plan – you should be proud of it so the more you promote the plan, the more people will know about it and help you to implement it.

REGULARLY REVIEW AND REPORT AGAINST YOUR PLAN

Make your plan a living, breathing document that helps people to get the job done. Your plan should form the basis of your reporting on progress and discussion at your club/code committee meetings. By doing this, each committee member will have a clear guide and understanding of what is expected from them as a member of the committee.

WHILE THE PLANNING PROCESS CAN SEEM LIKE A BIG TASK, BY KEEPING IT SIMPLE AND STICKING TO THE ABOVE STEP-BY-STEP PROCESSES, YOU CAN PUT YOUR CLUB/CODE ON A PATHWAY TO SUCCESS

WHAT IS GOING WELL?

As objectives in the plans are achieved, let everyone know about it – no matter how small!

WHAT NEEDS TO CHANGE?

Evaluate and modify it regularly if necessary – it may not be exactly what you want or can achieve first time around.

● We need to start doing...

● We need to stop doing...

● We need to keep doing...

LOOKING FOR FURTHER INFORMATION?

There is a range of resources available to assist with the running of your club/code.

HERE TO HELP

Your Regional Sports Trust/Organisations are also here to help – please don't hesitate to contact us if you would like to talk through any of this material and/or assistance for your club and/or code.

MORE INFORMATION CAN BE FOUND AT THE FOLLOWING:

aktive.org.nz >>

harboursport.co.nz >>

sportwaitakere.co.nz >>

sportauckland.co.nz >>

clmnz.co.nz/counties >> 

Information in this toolkit is for guidance only and does not constitute formal professional advice. Where specific issues arise in your club/code, advice should be sought from the relevant expert(s) as necessary.

NGĀ MIHI.

