



Strategic Planning 101 ... what sport leaders need to know

MARCH 5, 2016

Sport Law & Strategy Group



Providing strategic insight to the Canadian sport community through professional services in these areas:

- ✓ Legal Solutions and Policy Development
- ✓ Risk Management, Strategic Planning and Good Governance
- ✓ Communications, Facilitation and Integral Coaching™
- ✓ Event Management and Marketing
- ✓ Financial Planning and Human Resource Management

Our Values

We strive for excellence in all we do, and provide exceptional value to our clients. We embrace the following values:

- ✓ **Professional Integrity** – we believe in acting fairly, ethically and with compassion
- ✓ **Continuous Learning** – we invest in learning, both ours and yours
- ✓ **Passion** – we want to make a difference in sport



Some Of Our Clients

CCES



COACHES
of Canada



TRUE
SPORT
LIVES HERE



—JEUX DU—
CANADA
—GAMES—



Athletes**CAN**



Overview

- ✓ Goal of the workshop is to:
 - Increase your understanding of strategic planning
 - Share good planning practices that work for sport
 - Provide you with an inclusive methodology that is scalable to your needs
 - Increase your confidence so you can get started

How Well Are You Doing?

How effectively does your organization plan?

- ✓ Really effective – we rock at it
- ✓ Somewhat effective – we still have room to improve
- ✓ Not effectively at all – we need to do a lot better



A Better Way to Manage

Various organizational practices help us leverage our organization's assets and facilitate progress:

- Risk management
- Good governance
- Strategic planning
- Leadership development
- Crisis management
- Auditing practices
- Cultural transformation
- Change management



Strategic Planning

- ✓ A **systematic** process through which an organization agrees on – and builds **commitment** among key stakeholders to – priorities that are essential to its **mission**, connected to the **vision**, and reflective of the organization's **values**
- ✓ Takes into account **internal** and **external** environment
- ✓ Focuses more on answering “are we doing the right thing?” not “are we doing things right?”



Strategic Plan



Designing the Process

- ✓ Is this your first plan? If not, what worked well and what do you want to do differently this time?
- ✓ What is your timeline?
- ✓ What do your funders require?
- ✓ What is your planning capacity?
- ✓ What is your budget?
- ✓ Do you want to engage members? To what extent?



Simplified Approach

✓ Board meeting(s):

- Series of conversations or weekend retreat
- Review mission, vision, values
- Environmental scan
- Determine long-term strategic goals
- Identify short-term objectives
- Map out indicators/ targets
- Communicate plan to members

Comprehensive Approach

- ✓ Step 1: Strike a strategic planning committee:
- ✓ Step 2: Creating connections
- ✓ Step 3: Environmental scanning
- ✓ Step 4: Planning workshop(s)
- ✓ Step 5: Pulling it together
- ✓ Step 6: Communications
- ✓ Step 7: Commit to continuous learning
- ✓ Step 8: Implement the plan



Step 1 – Strike a committee

- ✓ Identify a champion
- ✓ Seek out knowledgeable and diverse people
- ✓ Create a terms of reference; clarify governance
- ✓ Determine timeline, timeframe, scope (new or renewed)
- ✓ Determine resourcing (capacity, budget, time)
- ✓ Agree on planning language
- ✓ Map out vision – what do we hope to achieve
- ✓ Develop critical path

Step 2 – Creating Connections

- ✓ Have you ever connected with your stakeholders?
- ✓ Difference between consultation and engagement
- ✓ What do you hope to achieve or gain?
- ✓ What will you do with the information?
- ✓ Is this a 'one off' or a new philosophy?



Step 3 – Determining Methods

- ✓ Qualitative, quantitative, both?
- ✓ Capacity to analyze and interpret: time, resourcing, expertise
- ✓ Is data ‘evidence’ or ‘information’?
- ✓ What form will the data take: reports, graphs, charts, presentations ...
- ✓ Who is the audience?
- ✓ How will you share it?

Step 4: Planning Workshop

- ✓ Hosting planning session(s):
 - Board, staff, key stakeholders, funders
 - How many?
 - External or internal facilitator
- ✓ Location and duration
- ✓ Meeting agenda and format
- ✓ Background materials

Sample Agenda

- ✓ Welcome and introductions
- ✓ Overview of data
- ✓ Review and renewal of mission, vision, and values
- ✓ What does success look like
- ✓ Determining strategic priorities/ directions
- ✓ SMART indicators/ targets
- ✓ Priorities for next calendar year
- ✓ Budget and operational plan
- ✓ Communications to key stakeholders and partners
- ✓ Continuous improvement

Step 5: Pulling it Together

- ✓ Good strategic plans:
 - focus on the why and the what ... not the how
 - include a story of how the plan came together
 - references relevant data
 - renews commitment to mission, vision, values
 - describes impact on key stakeholders
 - identifies 3-5 objectives and desired outcomes
 - provides performance targets

Step 6: Communications

- ✓ Be clear on who needs to know, by when, and how
- ✓ If you engaged people early on, then close the loop
- ✓ Think about how to present your strategic plan .. post cards, videos, marketing tool, newsletter, annual report
- ✓ Notice to members about the completed plan
- ✓ Consider ratifying at your AGM
- ✓ Invite ways for members to get involved in implementation



Step 7: Continuous Learning

- ✓ Think about the following:
 - What are we discovering ...
 - We will monitor our progress by ...
 - So what difference did we make ...
 - We will report to our stakeholders as follows ...
 - We will adapt our strategies if things don't work out as planned ...

Step 8: Implement the Plan

- ✓ Prioritize the strategies over a realistic timeframe
- ✓ Assign ownership to staff or volunteers
- ✓ Create a budget
- ✓ Monitor progress on the most important things
- ✓ Share success

Remember that ...

Strategic planning is an important tool for organizations who want to:

- ✓ Get better at what they do
- ✓ Prioritize what matters most
- ✓ Set longer term goals
- ✓ Engage key stakeholders
- ✓ Make smart decisions
- ✓ Remain relevant
- ✓ Be effective
- ✓ Recruit and retain good people



For more information:
www.sportlaw.ca
