

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





























CURLING

CANADA











TRUE

LIVES HERE





Athletes **CAN**

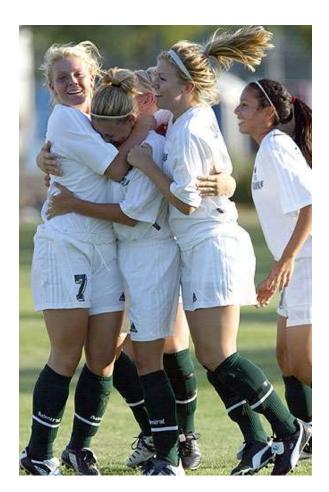
Overview

- ✓ 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

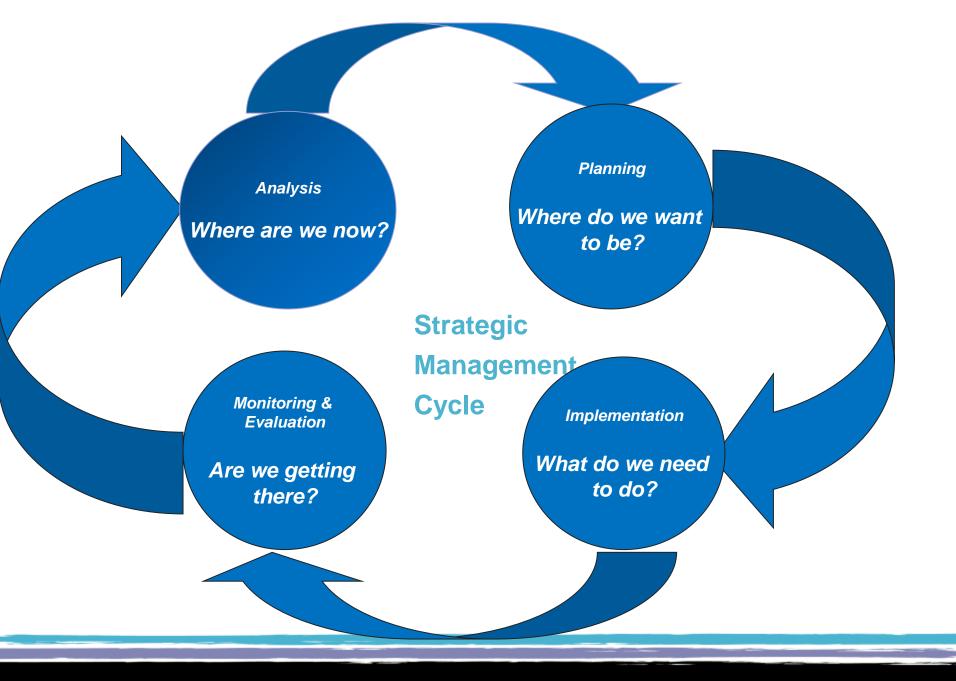
Various organizational practices help us leverage our organization's assets and facilitate progress:

- 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

Mission

Why we exist

Vision

What we aspire to be

Values

What we believe in

Goals

What we want to focus on

Objectives

Steps to help us achieve goals

Success Indicators and targets

How we will know we've been successful

Operational Plan

What we need to do, when, by whom, with what

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