

Strategic and operational planning toolkit



This toolkit is to assist sport and recreation organisations develop strategic and operational plans.

Planning enables an organisation to define its values and main objectives, have greater control over its direction, be proactive, build teamwork and improve financial performance.

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Using this toolkit

This toolkit has been developed to assist sport and recreation organisations to develop strategic and operational plans.

Strategic and operational planning is at the foundation of an organisation's activities. A strategic plan sets out where your organisation is heading and why it's heading there. An operational plan details how your organisation will get there.

This toolkit provides a process and tools to develop a strategic and operational plan.

This toolkit will help those involved in sport and recreation organisations to better understand the environment in which their organisation functions, its strengths, weaknesses and any issues the organisation may be attempting to address.

The toolkit contains a series of task sheets. Multiple copies of some task sheets will need to be printed or photocopied for distribution amongst the planners. The number of copies required is noted in the instructions of each work sheet. Other task sheets such as the attendance should be printed off just once.

The majority of task sheets also include a partially completed version, for the facilitator to use to prompt participants or to give examples of the style of answers required. At the back of the resource is a series of sheets to guide the facilitator through collating and condensing the information gathered during the planning sessions to produce the strategic and operational plan. A number of these task sheets are available online:

- [Strategic Plan Template \(Word\)](#)
- [Club Snapshot Template \(Word\)](#)
- [Strategic Plan Brochure Template \(Publisher\)](#)
- [Strategic and Operational Planning Presentation \(Powerpoint\)](#)

What you'll need

The facilitator of the planning sessions should have a complete copy of this toolkit, as should anyone taking notes.

Each participant should have:

- agenda
- ground rules
- copy of each task sheet and planning grid
- pen and notepaper

Other useful items and equipment

- Data projector/projector screen
- Sample generic plans
- Laptop computer
- National sport plans
 - Strategic plan
 - Operational plan
- Power board/extension cords
- State sport plans
 - Strategic plan
 - Operational plan
- Pens/highlighters
- Sticky notes/butcher paper
- White board markers/eraser
- Stopwatch
- Name stickers/badges

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Why plan?

Planning enables an organisation to:

- define its values and main objectives
- have greater control over its direction
- be proactive rather than reactive
- build teamwork
- improve financial performance
- learn from and avoid past mistakes
- evaluate performance.

Planning involves your organisation discussing:

- the purpose of your organisation
- where your organisation is currently at
- where your organisation would like to be in the future
- how your organisation might get there
- how you know when your organisation gets there
- national sporting organisation strategic plans
- state sporting organisation strategic plans
- local government recreation/open space plans
- ways to measure progress.

Planning seeks:

- a clear and common direction
- objectives, strategies and actions
- allocation of responsibility and resources
- time frames
- ways to measure progress.

Planning is for a specific audience:

- organisation members and their families
- board/committee
- local council
- new members
- sport and recreation organisations
- funding bodies.

A good plan will:

- enable the organisation to decide how it will reach an objective
- help the organisation move beyond crisis management to sensible planning and use of resources
- help to resolve issues of sequence or the order in which things should be done
- provide a basis for holding people accountable for what they do
- provide a basis for measuring and reviewing progress
- provide a basis for job descriptions
- provide a basis for budgeting.

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Types of plans

Strategic plan

The strategic plan outlines the organisation's direction for the future and a broad framework of goals and objectives to be achieved in line with this direction.

The strategic plan typically applies across a three to five-year period, and identifies the areas that need particular attention during this period to ensure the organisation gets to where it wants to be.

If the objectives identified in the strategic plan are to be achieved, it is essential the related strategies are further mapped out in an operational plan that details specific actions to be undertaken.

Mission	A comprehensive statement of the purpose of the organisation.
Values	The core values that describe how an organisation will carry out its mission. These should underpin all elements of a strategic plan.
Vision	Image of the desired future for the organisation and members.
Goals	The main focus areas for the organisation. Examples include participation, sport development, administration, promotions and marketing, finance, facilities and infrastructure.
Objectives	Specific statements detailing what will be accomplished in relation to each goal.
Strategies	How the objectives will be achieved. Strategies must be specific, measurable, achievable, reviewable and time bound.

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Types of plans

Operational plan

The operational plan details how the organisation will accomplish the goals, objectives and strategies outlined in the strategic plan. It includes the actions to be undertaken in line with the strategic plan objectives, who are responsible for carrying out these actions, and the time frames, costs and key performance indicators associated with these actions.

The operational plan should apply to the life of the strategic plan, but should be reviewed on a regular basis to ensure sufficient progress is being made towards achieving the objectives and so priorities can be revised as necessary.

Strategies	How the objectives in your strategic plan will be achieved.
Actions	Detailed description of the key actions to be undertaken to achieve each strategy.
Prioritise actions	The importance of each particular action: low, medium, high. This gives an indication of which actions should be completed earlier or later in the plan.
Timeframes	Describes the 'due date' for completion of each action.
Resources	Resource implications: financial, material and human resources.
Responsibility	Who is responsible for completing the actions.
Performance indicators	Indicators of what successful completion of each action looks like.
Risk management	Assess the potential for elements of the plan to be unsuccessful and plan to manage this.
Communication plan	How will the plan be communicated to have maximum benefit.
Review of plan	Develop annual systems to ensure the plan remains current and progress is monitored.

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Readiness assessment - task sheet 1

This assessment will help to identify what needs to be done prior to commencing the strategic and operational planning process.

The organisation's management team should work through the assessment.

Score your project or organisation as follows on each statement:

- 0 = yes
- 1 = somewhat
- 2 = no.

Where a statement has two parts and you would answer 'yes' to one part but not another, then go with the weaker response.

So, for example, you may be able to answer 'yes' your organisation has a constitution, but does not abide by it all the time. Your response then is 'somewhat'.

If your total is between 0 and 10 then your organisation is ready to undertake the planning process.

If your total is between 11 and 20, then your organisation would benefit from putting in place some key structures/documents. These would be ideal to focus on during the planning process.

If your total is between 21 and 30, then your organisation would benefit from undertaking key tasks prior to commencing the planning process. These tasks should be evident from the answers.

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Readiness assessment - task sheet I

Statement	Yes (0)	Somewhat (1)	No (2)	Score
We are incorporated.				
We have a constitution guiding our organisation.				
Our board/committee meets regularly and follows a set agenda.				
We have current position descriptions for all board/committee positions, paid positions and key volunteer roles.				
We have qualified administrators, qualified coaches and qualified volunteers.				
We produce an annual report and audited financial statements.				
We have effective financial controls and reporting structures.				
We have policies that guide our decision making, such as inclusion, communications, member protection and grievance.				
We hold appropriate insurance cover for our activities and facilities.				
We have, and adhere to, occupational health and safety procedures in regards to facilities and equipment to meet legal requirements.				
We adhere to all laws and regulations that apply to: <ul style="list-style-type: none"> • employment of personnel • operation of bars and food stalls • fundraising • selling of merchandise, products or services • organising public events • operation and maintenance of facilities. 				
We have an organisational structure that all members and stakeholders are aware of.				
We maintain accurate membership records.				
We are affiliated with the relevant regional/state/national sporting organisation.				
Our board/committee and the membership body is committed to the planning process.				
Does your organisation have the capacity to implement a strategic and operational plan, including delivering on actions, monitoring progress and reviewing the plan on a regular basis?				
Total				

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Pre-planning meeting - task sheet 2

It is important for the team managing the planning process to meet well in advance of the actual planning sessions.

This will enable the team to consider the following critical parts of a successful planning session:

Facilitators - An experienced facilitator helps and should be considered. However this toolkit has been created to assist organisations independently manage their planning. A scribe or assistant for the facilitator should also be considered.

Background - Ensure the facilitator is properly informed about the organisation, including: structure, history, achievements, membership, programs, events, partnerships, marketability, challenges, opportunities, future and potential goals.

Date/s - You can either run multiple short sessions or a single long session.

Time/s - Think about when you are most likely to have the most people attend, weekdays or weekends, business hours or after hours.

Venue - Make sure the venue has accessible amenities (especially if you're using it after hours), tea and coffee facilities, seating, space for a projector or whiteboard, access to power and heating.

Session requirements - keys, projector, butcher paper, tea and coffee, catering and heating.

Invitees - It's important to invite a broad spectrum of people to the planning sessions. Consider inviting: management, board members, staff, participants, community stakeholders, state/national association and local council.

Pre-planning questionnaires - Leave a few days between the return of the questionnaires and the first planning session to allow time to adapt the session to meet the needs of the organisation.

More questionnaires completed and returned equals less time needed on the planning day.

Agenda - Set an agenda following the agenda guidelines. Distribute the agenda to participants well ahead of the session.

Supporting documents:

- constitution/by-laws
- policies
- previous plans
- strategic/operational plans from relevant governing bodies for the sport
- strategic/operational plans from similar organisations
- position descriptions for staff/board members/volunteers
- fee structure
- annual report.

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Participant questionnaire - task sheet 3

This questionnaire will help participants in the planning process to prepare themselves so they can make a useful contribution to the process. The facilitator will also use the responses to shape the planning session/s and to gauge the current situation of the organisation. A [Word version of the Participant Questionnaire](#) is available online.

You've distributed the questionnaire to planning participants and now need to sort through the information.

Information from the questionnaires can be offered as suggestions and indications on the day and serve as a catalyst for conversation but the plan must be developed by consensus on the day.

The answers to the questionnaire will give you a fair idea of some of the topics that will need to be discussed on the day and the direction the plan is likely to take. Spend some time drafting the answers together to present to the group on the planning day. For example the answers relating to question nine about culture will be useful to set a starting point for discussing and establishing values for the organisation.

Similarly the answers to each question will be useful in setting starting points for the following:

Question	Theme	Areas of planning	
1	Strengths	Do well/do better	SWOT
2	Do better	Do well/do better	SWOT
3	Sector/region	PEST	Stakeholder analysis
4	Opportunities	PEST	SWOT
5	Threats	PEST	SWOT
6	Mission/vision	Mission/vision	Goals
7	Successes	Organisation history	Do well/do better
8	Challenges	Organisation history	Do well/do better
9	Culture	Values	Organisation history
10	Outcome	Goals, strategies, actions	Expectations

NB: SWOT - Strengths, weaknesses, opportunities and threats.

PEST - Political, social, economic and technological.

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Participant questionnaire - task sheet 3

Name and role (optional)

1. What are the strengths of our organisation?

2. What could our organisation be doing better?

3. What has happened in the past three years in the <insert sport> sector and/or <insert region> area that could affect our organisation?

4. What opportunities exist for us in the changing <insert sport> sector and/or <insert region> area?

5. What threats are facing us in the changing <insert sport> sector and/or <insert region> area?

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Participant questionnaire - task sheet 3

6. Do you think we have a clear mission and vision? That is we know what the purpose of the organisation is (mission) and we know what we would like the organisation to look like in the future (vision).

Clear mission	Yes/No
Clear vision	Yes/No

Write what you think the mission of the organisation is/should be:

Write what you think the vision of the organisation is/should be:

7. What successes have we achieved and what enabled us to achieve them?

8. What challenges have we not achieved and what prevented us from achieving them?

9. What is the current culture of the organisation?

10. What is the most important outcome that you would like to achieve?

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Strategic planning: agenda

Activity	Method	Duration	Sheet
Welcome and introductions	Whole group	25 mins	-
Register			4
Expectations and concerns			5
Roles			-
Ground rules			-
What is strategic planning and why do it?			-
Where is the organisation at?			
1. Community trends (PEST)	Three groups - one task each group	45 mins	6
2. Organisation history			7
3. Stakeholder analysis			8
Where is the organisation now? Do well/do better	Whole group brainstorm	10 mins	9
What does the organisation do? Why does it exist?	Whole group brainstorm	10 mins	10
Developing and drafting a mission statement	Small groups – discussion	15 mins	11
Developing and drafting values	Small groups to brainstorm and report back	20 mins	12
Break			
Where would the organisation like to be in the future?	Individual – futuring exercise	15 mins	13
Developing and drafting a vision statement	Small groups - discussion	15 mins	14
Developing and drafting goals	Whole group – dots exercise	10 mins	15
SWOT analysis of goals	Split into groups so each group completes SWOT on one or two goals, then shares	30 mins	16
Developing and drafting objectives	Whole group	30 mins	17
Drafting preliminary strategies	Small groups - discussion	30 mins	18
Summarise session one, complete evaluations	Whole group - evaluations done individually	25 mins	19

Note: A [Word version of the Strategic Planning Agenda](#) is available online.

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Strategic planning: introductions

Register

As participants arrive, they should add their details to the attendance register (task sheet 1).

Welcome and introductions

The facilitators should introduce themselves and any other facilitators and explain the reasons why they have been asked to facilitate the planning session. Housekeeping should be covered and then everyone should be given the opportunity to introduce themselves and explain their role within the organisation.

Expectations and concerns

During introductions it is often insightful to ask people to briefly describe what they expect and what they are concerned about the planning process. These expectations should be recorded to refer back to during the planning session (task sheet 5).

Roles in the planning session

It is important to clearly outline what roles everyone will need to play during the planning session. Participants are the experts of their organisation, so their role is to provide the practical knowledge, facts and history required to complete the tasks and own the outcomes of the process. The facilitator is there to assist with the process and guide the conversation where necessary. Their role is to keep the session on track, and to coordinate the knowledge and expertise in the room into a workable plan.

Ground rules

It is important to set some clear and basic ground rules to ensure the session runs smoothly. Sometimes organisations can have a history of infighting or distinct factions that need to be brought together on the planning day. The facilitator should discuss how the group should work together towards the creation of the plan. The behaviour at the planning session should be an example of how the organisation will operate moving forward.

Key terms and rules

Openness

Confidentiality

Timeliness

Attack challenges - not each other

Respect - each other/ the group/ the process

Discuss - the here and now/ the future

Participate - actively/continuously

Think - strategically/big picture/positively

Listen - unconditionally/patiently

Explore - all possibilities/alternate solutions

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Strategic planning: attendance register - task sheet 4

Name
Position
Email

Name
Position
Email

Name
Position
Email

Name
Position
Email

Name
Position
Email

Name
Position
Email

Name
Position
Email

Name
Position
Email

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Strategic planning: expectations and concerns - task sheet 5

Expectations and concerns	

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Strategic planning: PEST analysis - task sheet 6

Purpose:	To consider external political, economic, social and technological (PEST) forces and trends currently affecting the organisation, or which may affect the organisation in the future. This allows you to understand the context of your organisation and its services.
Time:	45 minutes as a small group 15 minutes as a large group
Resources:	Butchers paper Task sheet 6 (one copy per group)
Steps:	<ol style="list-style-type: none">1. Brainstorm external factors that are affecting the organisation.2. Sort the factors into categories of political, economic, social or technological and record them on the task sheet.3. Double check if any external influences have been missed by cross-checking with the examples given.4. Briefly report back to the whole group about your findings.

Questions 3, 4 and 5 in the pre-planning questionnaire ask participants to consider opportunities, threats and changes that influence their organisation. This information should be presented to this group for analysis.

The information from this task sheet may be relevant:

Expectations and concerns (task sheet 5).

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Strategic planning: PEST analysis - task sheet 6

Sample	
Political	Economic
Availability and trends in funding. Regulatory bodies. Awareness of legal rights. Ecological/environmental factors. Burden on volunteers.	Critical consumers. Working parents. Part-time/casual working trends and hours. Fee for service. Organisation specific expenses.
Social	Technological
Casual versus regular participation trends. Aging population base. Volunteering culture/requirements. Traditional sport and organisation participation trends. Demographic trends in client base/s.	Use of discretionary time (tech. versus sport). Aging technological frameworks. Social networking Communication pathways. Pace of technological change.

Note: A [Word version of the PEST Analysis Task Sheet](#) is available online.

Political	Economic
Social	Technological

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Strategic planning: organisation history - task sheet 7

Purpose:	To understand the series of events and milestones that contributed to the organisation's current position.
Time:	45 minutes as a small group 15 minutes as a large group
Resources:	Task sheet 7 (one copy per group)
Steps:	<ol style="list-style-type: none">1. Brainstorm significant events and milestones that contributed to the organisation's current position.2. Place these events and milestones in chronological order from the organisation's inception to today on the task sheet provided.3. Double check if any events or milestones have been overlooked by cross-checking with the sample provided and the following prompts:<ol style="list-style-type: none">a. when and why the organisation was foundedb. when new programs/services were offeredc. when and why key policies were implementedd. hosting of key eventse. awards/successesf. key challenges.4. Briefly report back to the whole group about your findings.

Questions 7, 8 and 9 in the pre-planning questionnaire ask participants to list successes, challenges and the culture of the organisation. These responses may assist with prompting discussion.

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Strategic planning: organisation history - task sheet 7

Where is the organisation now?

Sample

2002 organisation increases services to offer competitive and recreational participation opportunities, competes in state organisation events throughout the year.	Organisation founded in 2001 as other organisations in the same area were at capacity and unable to meet demand – first AGM in November.
Feb 2004 Membership decline, club cancels some competitive services and training days and plans for a concerted membership push	2003 regular governance training introduces for all voluntary board members and key volunteers – boost in professionalism of the organisation.
2005 Organisation hosts state association championships and advertises some facilities for hire to local community.	August 2004 High performance squad introduced as organisation attracts interstate coach on relocation to Tasmania.; immediate improvement in gifted athletes programs.
2007 inclusion policy adopted and community engagement focus to increase use of facilities through school and disability sector involvement .	2006 Increased revenue allows for paid part time manager to be appointed.

Note: A [Word version of the Organisation History Task Sheet](#) is available online.

Where is the organisation now?

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Strategic planning: stakeholder analysis - task sheet 8

Purpose:	To identify the organisation's key stakeholders.
	To analyse the stakeholders core expectations of, interests in and potential to contribute to the organisation.
Time:	15 minutes as a large group
Resources:	Butchers paper
	Task sheet 8 (one copy per group)
Steps:	<ol style="list-style-type: none">1. Brainstorm a list of internal and external stakeholders. These might include state sporting organisations, members, staff, local schools, community organisations or local government.2. List each stakeholder's interest in the organisation.3. List each stakeholder's expectations of the organisation are.4. List what each stakeholder could potentially contribute to the organisation.5. Rank the stakeholders in order of their importance/influence on the organisation.6. Briefly report back to the whole group about your findings.

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Strategic planning: stakeholder analysis - task sheet 8

Stakeholder	Interests	Expectations	Potential	Ranking
	What is their interest in the organisation?	What do they expect from their relationship with the organisation?	What contribution could they make to the organisation?	Rank the stakeholders in order of importance

Note: A [Word version of the Stakeholder Analysis Task Sheet](#) is available online.

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Strategic planning: do well/do better - task sheet 9

- Purpose:** To review what the organisation does well (its strengths), and could do better (its weaknesses).
- Time:** 10 minutes as a whole group
- Resources:** Butchers paper
Task sheet 9 (one copy)
- Steps:**
1. Brainstorm a list of areas and activities that the organisation could perform better.
 2. Double check the lists against key areas in the task sheet.

Questions 1, 2, 7 and 8 in the Pre-Planning Questionnaire ask participants to list the strengths, successes, challenges and things that could be done better at the organisation.

This information should be presented to the full group now.

The information from these tasks may be relevant:

Expectations and concerns (task sheet 5), organisation history (task sheet 7).

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Strategic planning: do well/do better - task sheet 9

Key area	Do well	Do better
Participation		
Sport development		
Administration		
Promotions and marketing		
Finance		
Facilities and infrastructure		

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Strategic planning: core purpose - task sheet 10

Purpose:	To identify and understand the core purpose of the organisation.
Time:	10 minutes as a whole group
Resources:	Task sheet 10 (one copy)
Steps:	<ol style="list-style-type: none">1. Consider the following questions.<ul style="list-style-type: none">• Why does the organisation exist?• How would you describe the organisation to a non-member?• If the organisation can only do a handful of things what is the most important?• Who does the organisation serve and how does it serve them?2. Record the responses on your task sheet.

The information from these tasks may be relevant:

Organisation history (task sheet 7), stakeholder analysis (task sheet 8).

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Strategic planning: core purpose - task sheet 10

Why does the organisation exist? / What does it do?

How would you describe the organisation to a non-member?

If the organisation can only do a handful of things, what is the most important?

Who does the organisation service and how does it service them?

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Strategic planning: mission statement - task sheet 11

Purpose:	To create a statement of the purpose of the organisation.
Time:	15 minutes
Resources:	Task sheet 11 (one copy per group)
Steps:	<ol style="list-style-type: none">1. Ask participants to make small groups of two or three.2. In this group, using the core purpose.3. Draft a mission statement based around your analysis of the information and thoughts.4. Draft a one to two sentence statement which describes the mission of the organisation.

Question 6 of the Pre-Planning Questionnaire asks participants about the mission of the organisation.

This information should be presented to the full group now.

The information from these tasks may be relevant:

Organisation history (task sheet 7), stakeholder analysis (task sheet 8), core purpose analysis (task sheet 10).

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Strategic planning: mission statement - task sheet 11

Draft a one to two sentence mission statement in the box provided.

A mission statement should include:

- what the organisation is
- what the organisation does/achieves
- who the work is aimed at (the target group).

Key words

Provide, protect, cater, grow, promote, include, create, service, champion, offer, save, represent, build, train and encourage.

Examples

Save lives in the water (Surf Life Saving Tasmania, 2011).

The Launceston Bike Plan will encourage increased participation in cycling by improving the quality and quantity of safe cycling opportunities for Launceston residents and visitors (Launceston Bike Plan, 2004-2009).

The North Esk Rowing Club will cater for a diverse range of members needs whilst seeking success in both competition and recreational rowing. The club will develop quality facilities and equipment, through well organised and enthusiastic management committees (North Esk Rowing Club, 2003).

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Strategic planning: values statement - task sheet 12

Purpose:	To clarify the behaviours which are encouraged by all who participate at the organisation.
Time:	20 minutes
Resources:	Task sheet 12 (one copy per group)
Steps:	<ol style="list-style-type: none">1. Make small groups of two or three and list the behaviours you would like to see exhibited by everyone involved with the organisation.2. List common themes that appear in the listed behaviours.3. Create a values statement or series of statements that capture these common themes.

Question 9 of the pre-planning questionnaire asks participants to list what they think the culture of the organisation is. This information should be shared with the group now.

The information from these tasks may be relevant:

Do well/do better (task sheet 9), core purpose analysis task sheet 10).

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Strategic planning: values statement - task sheet 12

List some values statements that describe how the organisation should behave and interact.

A values statement is a commitment from the organisation to behave a certain way.

Your organisational values are the shared values that underpin your work as an organisation and your relationships with users and other stakeholders.

They are what you believe is:

- the right way to do things
- the right way to deal with people
- how your organisation should work.

Some decisions your values will assist you to make in your organisation are:

- Should we work with this group of people, or project, or organisation?
- Should we spend money on this?
- Is what we are doing worthwhile or could the money be better spent doing something else?
- How should staff/volunteers behave when they approach and do their work?

Key words

Act, deliver, passion, share, right, embrace, partnership, excellence, diverse, drive, healthy, learning, fun, respect and achieve.

Examples

We act with integrity.

Our people matter.

We make a real difference. (Dept. of Economic Development, Tourism and the Arts, 2010)

teamwork - national unity through constructive relationships.

autonomy - of state and territory associations.

professionalism - demonstrated through integrity.

progressive - adapt to the changing needs of society.

innovative - proactive culture attuned to environmental changes. (Bowls Australia 2009-2012)

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Strategic planning: the future - task sheet 13

Purpose:	To discuss what aspects of the organisation would be different in an improved version of the organisation.
Time:	15 minutes
Resources:	Butchers paper Task sheet 13 (one copy per person)
Steps:	<ol style="list-style-type: none">1. Think about the following scenario: You've been out of the country for 10 years. In that time you've had no contact with the organisation and you arrive back to find that everything that wasn't working well is fixed and that everything that was already going well is now going great.2. Discuss what the most noticeable differences are.3. Record the most noticeable differences. <p>It may be useful to consider: participation / sport development / administration / promotions and marketing / finance / facilities and infrastructure</p>

The information from these tasks may be relevant:

Organisation history (task sheet 7), stakeholder analysis (task sheet 8), do well/do better (task sheet 9).

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Strategic planning: the future - task sheet 13

What are the most noticeable differences between the current organisation and an improved vision of the organisation?

Participation

Sport development

Administration

Promotions and marketing

Finance

Facilities and infrastructure

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Strategic planning: vision statement - task sheet 14

Purpose:	To create a statement of the desired future for the organisation and members.
Time:	15 minutes
Resources:	Task sheet 14 (one copy per group)
Steps:	<ol style="list-style-type: none">1. Make small groups of two or three people.2. In this group, using the futuring information and thoughts, draft a one to two sentence statement which describes the vision of the organisation.

Question 6 of the pre-planning questionnaire asks participants to draft a vision statement.

This information should be shared with the group now.

The information from these tasks may be relevant:

Futuring (task sheet 13), mission statement (task sheet 11) and values statement (task sheet 12).

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Strategic planning: vision statement - task sheet 14

Draft a one to two sentence vision statement in the box provided.

Why is a vision statement important?

It is an easy way to communicate to others what you strive for and will become.

It helps you to clarify and focus your work towards one shared future.

If any of these components change, then the vision statement needs to change as well.

It is important to review your vision statement from time to time.

A vision statement will include the following components:

What the organisation will be.

What the organisation will do/achieve.

Who the organisation will work with (the target group).

Key words:

Modern, successful, strong, high-profile, well-managed, professional, active, healthy, motivational, stable, industrious, responsive, pro-active, fun and inclusive.

Examples:

All Tasmanians participating in sport, recreation and physical activity as part of their everyday life (Surf Life Saving Tasmania, 2009).

Bowls – The sport for all Australians

We will stimulate innovation of the business and sport of bowls so that peak bodies and clubs become known for their delivery of excellent services and resources, so facilities become contemporary community venues and the game attracts people of all ages and backgrounds (Bowls Australia, 2009-2012).

The North Esk Rowing Club will be a modern, successful club – with strong membership, sound finances and an outstanding future (North Esk Rowing Club, 2003).

Strategic and operational planning toolkit

Strategic planning: goals - task sheet 15

- Purpose:** To specify the main focus areas for the organisation.
- Time:** 10 minutes
- Resources:** Task sheet 15 (one copy)
- Steps:**
1. Review the major goal areas that were identified at the pre-planning meeting or through the pre-planning questionnaires and what each one entails.
 2. Consider whether there any major areas of the organisation that have been missed and if so add them to the list of potential goals?
 3. Vote for the three goals that you feel are most important for the organisation to focus on for the life of the plan.
 4. After voting have a brief discussion about the goals that are definitely included and those that may be dropped due to low votes.
 5. After voting check the following.
 - Do we have all the bases covered?
 - What is the main focus? / Does it align with the mission statement?
 - Where will this take us? / Does it align with the vision statement?
 - Are these the right things to focus on? / Does it align with the values statement?

Six broad areas that are commonly included in strategic goals for sport and recreation organisations are:

Participation, sport development, administration, promotions and marketing, finance, facilities and infrastructure.

These areas may be sufficient or you may want to narrow the categories. For example, governance may be a significant enough area to stand on its own rather than as a sub category of administration, similarly events may come out of promotions and marketing.

The information from these tasks maybe relevant: core purpose analysis (task sheet 10), mission statement (task sheet 11) vision statement (task sheet 14).

Question 2, 4 and 10 of the pre-planning questionnaire asks participants to describe what outcomes they would like from the planning session; this information should be shared with the group now.

Strategic and operational planning toolkit

Strategic planning: goals - task sheet 15

Vote for the three most important areas that the organisation should focus on for the life of the plan		
Participation		Total
Sport development		Total
Administration		Total
Promotions and marketing		Total
Finance		Total
Facilities and infrastructure		Total
<Insert suggested area>		Total
<Insert suggested area>		Total

Strategic and operational planning toolkit

Strategic planning: SWOT analysis - task sheet 16

- Purpose:** Analyse the organisation's current situation in terms of strengths, weaknesses, opportunities and threats (SWOT).
- Time:** 30 minutes
- Resources:** Task sheet 16 (enlarge to A3 – one copy per goal)
- Steps:**
1. Split into groups, one group per potential goal if possible.
 2. Analyse the organisation's performance in the goal area and list the strengths, weaknesses, opportunities and threats (SWOT) of and to the organisation.
 3. Briefly report back to the whole group.
 4. After the SWOT you should encourage discussion to come to consensus on which goals should be included in the plan and what the scope of these goals will be.

Questions 1, 2, 4 and 5 of the Pre-planning Questionnaire asks participants to list the strengths, weaknesses, opportunities and threats of the organisation as a whole; this information should be shared with the group now.

The information from these tasks may be relevant:

Do well/do better (task sheet 9), PEST analysis (task sheet 6), mission statement (task sheet 11).

Strategic and operational planning toolkit

Strategic planning: SWOT analysis - task sheet 16

Goal:	
Strengths	Weaknesses
What we do well	Something we do poorly
Assets (human/physical/financial)	A disadvantage
Why do our members come back?	A deficiency in expertise
Personnel (staff/volunteers/members/committees)	What we could do better
Opportunities	Threats
How can we create a competitive advantage?	Competitive behaviour
Where is the potential to improve/expand?	New product/service
Partnerships	Complacenc
Training	Demographic changes

Note: A [Word version of the SWOT Analysis Task Sheet](#) is available online.

Goal:	
Strengths	Weaknesses
Opportunities	Threats

Strategic and operational planning toolkit

Strategic planning: objectives - task sheet 17

Purpose:	Develop specific statements detailing what will be accomplished in relation to each goal.
Time:	30 minutes
Resources:	Task sheet 17 (one copy per goal)
Steps:	<p>Split into groups, one group per confirmed goal if possible. Refer to task sheet 12 for the goals.</p> <p>Review the SWOT analysis of the goal (task sheet 16).</p> <p>Develop a specific objective in relation to the goal which does the following.</p> <ul style="list-style-type: none">• Capitalises on the strengths.• Improves on the weaknesses.• Takes advantage of the opportunities.• Minimises threats. <p>Ensure that the objective will aid in achieving the vision of the organisation.</p> <p>Share the objective/s with the group.</p> <p>The information from these tasks may be relevant:</p> <p>Values statement (task sheet 12), vision statement (task sheet 14), SWOT analysis (task sheet 16).</p> <p>If you cannot decide on one definitive objective, list all the possibilities.</p>

Strategic and operational planning toolkit

Strategic planning: objectives - task sheet 17

Draft a one sentence objective for your goal in the box provided.

Goal:

Objective/s:

An objective will do the following.

- Capitalise on the strengths.
- Improve on the weaknesses.
- Take advantage of the opportunities.
- Minimise threats.

Examples.

Governance

A strong organisation that can lead and govern Softball Victoria, that is strategic, dynamic and efficient. (Softball Victoria, 2010-2015)

Participation

Manage a sustainable increase in participation across age groups and genders. (Football Federation Tasmania 2009-2013)

Marketing and communication

Effectively communicate with key stakeholders and raise the profile of water polo in the eyes of the Tasmanian public. (Tasmanian Water Polo 2007-2010)

Strategic and operational planning toolkit

Strategic planning: preliminary strategies - task sheet 18

Purpose: To draft strategies describing how the objective will be achieved.

Time: 30 minutes

Resources: Task sheet 18 (one copy per objective)

- Steps:**
1. Split into groups, one group per objective if possible.
 2. Brainstorm possible strategies that the organisation can implement which, once completed, achieve the objective.
 3. Share the preliminary strategies with the group.

Please note that these strategies will be preliminary only. They create the end point for the strategic plan and the beginning point for the operational plan.

The section on operational planning explains how to confirm and edit your strategies to ensure they are ready to launch into an operational planning process.

Strategic and operational planning toolkit

Strategic planning: preliminary strategies - task sheet 18

Draft three one sentence strategies to achieve the objective in the box provided.

Goal:
Objective:
Strategies:

A strategy will do the following

- Describe a course of action.
- Enable achievement of the objective.
- Actively contribute towards the vision of the organisation.

Key words

Foster, develop, provide, prepare, produce, organise, perform, nurture, support, explore, promote, advance, build, introduce, deliver, adopt, sustain and build.

Examples

Goal - governance:

Manage and strengthen stakeholder relations. (Boxing Australia, 2010-2014)

Goal - participation:

Develop initiatives and programs that engage new and diverse participation and membership. (Cycling Tasmania 2011 and beyond)

Goal - sport development:

Coaching to be recognised as a desirable profession. (Gymnastics Australia 2009-2012)

Strategic and operational planning toolkit

Strategic planning: review - task sheet 19

Purpose:	To recap what has been achieved so far.
Time:	25 minutes
Resources:	Evaluation form (task sheet 19).
Steps:	<p>Summarise session one and review the process so far in relation to developing the following topics:</p> <ul style="list-style-type: none">• mission statement.• values statements• vision statement• goal areas• objectives.

Review your session by completing the evaluation form on the following page.

Confirm the date, time and location of the operational planning session/s if they are scheduled.

Strategic and operational planning toolkit

Strategic planning: review - task sheet 19

Please complete the quick evaluation form below to allow the facilitator to improve their facilitation skills and to improve the content of the planning presentations.

1. The strategic planning process was logical and understandable.

Strongly Disagree ☐ Disagree ☐ Not Sure ☐ Agree ☐ Strongly Agree ☐

Comments: _____

2. The strategic planning process will have a positive impact on my organisation.

Strongly Disagree ☐ Disagree ☐ Not Sure ☐ Agree ☐ Strongly Agree ☐

Comments: _____

3. I feel that I have contributed to the direction and goals of my organisation.

Strongly Disagree ☐ Disagree ☐ Not Sure ☐ Agree ☐ Strongly Agree ☐

Comments: _____

4. There was sufficient time for each section of the planning process.

Strongly Disagree ☐ Disagree ☐ Not Sure ☐ Agree ☐ Strongly Agree ☐

Comments: _____

5. The facilitators aided the process of creating our strategic plan.

Strongly Disagree ☐ Disagree ☐ Not Sure ☐ Agree ☐ Strongly Agree ☐

Comments: _____

Strategic and operational planning toolkit

Operational planning

The operational plan details how the organisation will accomplish the goals, objectives and strategies outlined in the strategic plan.

It includes the actions to be undertaken in line with the strategic plan objectives, who are responsible for carrying out these actions, and the time frames, costs and key performance indicators associated with these actions.

The operational plan should apply to the life of the strategic plan, but should be reviewed on a regular basis to ensure sufficient progress is being made towards achieving the objectives and so priorities can be revised as necessary.

The key components of the operational plan include.

Strategies

Actions

Prioritise actions

Timeframes

Resources

Responsibility

Performance indicators

Risk management

Communication plan

Review of plan

Strategic and operational planning toolkit

Operational planning: agenda

Activity	Method	Duration	Sheet
Recap day one, confirm the values, mission and vision	Whole group	30 mins	20
Recap goals and objectives	Whole group	15 mins	20
Introduce the planning grids	Whole group	15 mins	20
Develop and draft strategies	One/two goals per group	30 mins	21 (20)
Break 20 mins			
Develop actions	One group member rotate to a new group		22 (20)
Prioritise actions	One group member rotate to a new group	15 mins	23 (20)
Allocate timeframes, resources and responsibility to actions	One group member rotate to a new group	20 mins	24, 25, 26 (20)
Allocate key performance indicators	One group member rotate to a new group	20 mins	27 (20)
Risk management overview	Whole group	10 mins	28 (20)
Communication plan / where to from here?	Whole group	10 mins	29 (20)
Reviewing the plan	Whole group	10 mins	30
Evaluation, close and thanks	Whole group	5 mins	31

Note: A [Word version of the Operational Planning Agenda](#) is available online.

Strategic and operational planning toolkit

Operational planning: recap and planning grid - task sheet 20

Purpose:	To recap the values statement, mission statement and vision statement from the strategic planning sessions.
	To confirm the goals and objectives.
	To introduce the planning grid as the resource for operational planning.
Time:	30 minutes
Resources:	Task sheet 20 - planning grid (enlarge to A3 – one copy per goal).
Steps:	1. Review the values statement, mission statement and vision statement from the strategic planning sessions.
	2. Confirm, change and/or add to the goals and objectives.
	The remainder of the operational tasks will be completed on the planning grids.
	The planning grids provide a simple way to record the information from the following steps.
	There should be a planning grid for each goal/objective.
	It is best to print/copy the sample planning grid as an A3 sheet.

Operational planning: planning grid - task sheet 20

[illegible]

Note: A [Word version of the Operational Planning Grid](#) is available online.

Strategic and operational planning toolkit

Operational planning: strategies - task sheet 21

Purpose:	To confirm the strategies that the organisation will implement in order to achieve the objectives.
Time:	30 minutes
Resources:	Task sheet 18 Planning grid (task sheet 20)
Steps:	<p>Split into groups, one group per objective if possible.</p> <p>Distribute task sheet 18 from the strategic planning session and confirm, change and/or add to the strategies.</p> <p>Ensure that the listed strategies, if achieved, will enable achievement of the objective.</p> <p>Ensure that the listed strategies will contribute towards achievement of the vision.</p>

Transpose confirmed strategies from task sheet 18 to the planning grid (task sheet 20).

The remainder of the operational tasks will be completed on the planning grid.

Strategic and operational planning toolkit

Operational planning: actions - task sheet 22

Purpose:	To detail the actions that the organisation will undertake in implementing the strategies.
Time:	20 minutes
Resources:	Planning grids (task sheet 20)
Steps:	<p>Split into groups, one group per objective if possible.</p> <p>Brainstorm actions that need to be undertaken to implement each strategy (many strategies will require more than one action to be implemented).</p> <ol style="list-style-type: none">1. Add confirmed actions to the planning grids.2. Ensure that the listed actions contribute to the implementation of the strategy.3. Ensure that each action is specific, measurable, achievable, reviewable and time-bound.
Example:	<p>Strategy – Attract and retain members.</p> <ol style="list-style-type: none">1. Advertise junior programs in local school newsletters.2. Host an annual Come and Try Day3. Implement national sporting association grass roots participation program in conjunction with Active After School Communities.4. Implement exit surveys for non-returning members. <p>Most strategies will require more than one action to achieve them and that it is the action stage which breaks large tasks down into smaller components.</p> <p>Depending on group size, groups may need to develop actions for two or more objectives.</p> <p>Participants should add confirmed actions to the planning grids.</p>

Strategic and operational planning toolkit

Operational planning: priorities - task sheet 23

Purpose: To give a priority rating to each particular action: low, medium or high, giving an indication of which actions should be completed earlier or later in the plan.

Time: 10 minutes

Resources: Planning grids (task sheet 20)

- Steps:**
1. Split into groups, one group per objective if possible.
 2. Determine which actions require other actions to be completed first to be viable.
 3. Prescribe a priority rating to each action. Actions that need to be completed for other actions to take place should be awarded a higher priority than the preceding action.
 4. If there are a lot of actions give each one a priority out of ten with ten being the highest and allocate L/M/H priority as follows:
 - low: 0-4
 - medium 5-7
 - high 8-10

The actions cannot all be high priority.

Depending on group size, groups may need to allocate priorities for two or more objectives.

Participants should add confirmed priorities to the planning grids.

Strategic and operational planning toolkit

Operational planning: timeframes - task sheet 24

Purpose:	Describes the 'due date' for completion of each action.
Time:	20 minutes
Resources:	Planning grids (task sheet 20)
Steps:	<ol style="list-style-type: none">1. Split participants into groups, one group per objective if possible.2. Determine which actions require other actions to be completed before they can begin/progress.3. Allocate a timeframe to each action (at least month and year) – remembering that the plan runs for a number of years and the organisation needs to be realistic about its workload, especially if relying on primarily volunteer input. <p>It is the purpose of the plan to achieve the objective by the end of its lifespan (typically in three to five years – not the end of the current year).</p> <p>Participants should complete the timeframe, resources and responsibilities tasks simultaneously.</p> <p>Depending on group size, groups may need to allocate time frames, resources and responsibilities for two or more objectives.</p> <p>Participants should add confirmed time frames, resources and responsibilities to the planning grids.</p>

Strategic and operational planning toolkit

Types of plans: resources - task sheet 25

Purpose: To determine the resource implications: financial/material/human of each action.

Time: 20 minutes

Resources: Planning grids (task sheet 20)

Steps:

1. Split into groups, one group per objective if possible.
2. Determine what resources are required for each action to be achieved. Assess the need for resources against the three categories.

Financial	Material	Human
Budget planning	Equipment requirements	Volunteer/paid position
Fundraising	Facility requirements	Induction/supervision
Investment	Infrastructure requirements	Access and equity
Sponsorship	Technology requirements	Professional development
Approximate \$ figure(s)	Transport requirements	Occupational health and safety
		First aid

3. Allocate resources to each action and ensure that the organisation has the capacity to supply/provide these resources.

Complete the timeframe, resources and responsibilities tasks simultaneously.

Depending on group size, groups may need to allocate time frames, resources and responsibilities for two or more objectives.

Add confirmed time frames, resources and responsibilities to the planning grid.

Strategic and operational planning toolkit

Operational planning: responsibility - task sheet 26

Purpose:	Allocate who is responsible for completing/overseeing the action.
Time:	20 minutes
Resources:	Planning grids (task sheet 20)
Steps:	<ol style="list-style-type: none">1. Split into groups, one group per objective if possible.2. Determine who in the organisation is responsible for each action. <p>Allocate responsibility to a particular position or committee rather than to a specific person. For example give responsibility to the secretary but not to Jack Brown (the current secretary).</p> <p>Be aware of overloading a particular person or volunteer, it is often the president or general manager that receives the majority of responsibilities and if one individual receives too much responsibility the work will often not be able to be completed.</p> <p>Complete the timeframe, resources and responsibilities tasks simultaneously.</p> <p>Depending on group size, groups may need to allocate time frames, resources and responsibilities for two or more objectives.</p> <p>Add confirmed time frames, resources and responsibilities to the planning grid.</p>

Strategic and operational planning toolkit

Types of plans: performance indicators - task sheet 27

Purpose:	To establish what a completed action looks like for the purpose of monitoring and measuring performance.
Time:	20 minutes
Resources:	Planning grids (task sheets 20)
Steps:	<ol style="list-style-type: none">1. Split into groups, one group per objective if possible.2. Think about what will be different if each action is completed, what will exist that didn't exist before or what will have changed.3. Ensure that achievement of the performance indicator equates to completion of the action.4. Ensure that each performance indicator is SMART.

If a performance indicator is going to be of any value, there must be a way to accurately define and measure it:

'Be the most popular organisation.'

This is not a measurable performance indicator as there is no way to measure the organisation's popularity or compare it to others.

'Increase in organisation membership by two per cent.'

This is a measurable performance indicator as it is factual and can be demonstrated through an audit of the organisation's membership

Depending on group size, groups may need to allocate performance indicators for two or more objectives.

Add confirmed performance indicators to the planning grid.

Strategic and operational planning toolkit

Operational planning: risk management - task sheet 28

- Purpose:** Assess the potential for elements of the plan to be unsuccessful and how to manage this.
- Time:** 10 minutes
- Resources:** Butchers paper
- Steps:**
1. As a group discuss the concept of risk management and the importance of organisations incorporating risk management into their planning and day to day operations.
 2. Select one action from their planning grid and to ask the following questions in relation to this action:

What can go wrong?

What will we do to prevent it?

What will we do if it happens?

Sport and Recreation Tasmania has developed a risk management resource which is available to organisations at www.sportandrecreation.tas.gov.au.

Strategic and operational planning toolkit

Operational planning: communication - task sheet 29

Purpose:	Determine how the plan will be communicated to have maximum benefit.
Time:	10 minutes
Resources:	Butchers paper
Steps:	<ol style="list-style-type: none">1. Discuss the concept of developing a communications plan and the importance of taking the broader organisation and stakeholders on the journey of the plan with you.2. Brainstorm some activities/methods that the organisation could use to communicate the:<ul style="list-style-type: none">• existence of the plan• progress on the plan• successes of the plan.3. Encourage everyone to communicate the plan and create 'buy-in' from the organisation's members, volunteers and stakeholders.

Strategic and operational planning toolkit

Operational planning: reviewing - task sheet 30

Purpose:	Develop systems to ensure that the plan remains current and progress is monitored
Time:	10 minutes
Resources:	
Steps:	<ol style="list-style-type: none">1. As a group discuss the importance of regularly reviewing the plan, monitoring progress and updating the plan as achievements begin to occur.2. Brainstorm some ways that review of the plan could be worked into the standard operations of the organisation. Try to include ways for everyone to contribute towards the review of the plan. Ensure the following parties are included in the review process:<ul style="list-style-type: none">• external and internal stakeholders• committee/board• membership base.3. Develop systems whereby review and updating of the plan becomes standard practice.

Strategic and operational planning toolkit

Operational planning: evaluation - task sheet 3 I

Please complete the quick evaluation form below to allow the facilitator to improve their facilitation skills and to improve the content of the planning presentations.

1. The strategic planning process was logical and understandable.

Strongly Disagree ☐ Disagree ☐ Not Sure ☐ Agree ☐ Strongly Agree ☐

Comments: _____

2. The strategic planning process will have a positive impact on my organisation.

Strongly Disagree ☐ Disagree ☐ Not Sure ☐ Agree ☐ Strongly Agree ☐

Comments: _____

3. I feel that I have contributed to the direction and goals of my organisation.

Strongly Disagree ☐ Disagree ☐ Not Sure ☐ Agree ☐ Strongly Agree ☐

Comments: _____

4. There was sufficient time for each section of the planning process.

Strongly Disagree ☐ Disagree ☐ Not Sure ☐ Agree ☐ Strongly Agree ☐

Comments: _____

5. The facilitators aided the process of creating our strategic plan.

Strongly Disagree ☐ Disagree ☐ Not Sure ☐ Agree ☐ Strongly Agree ☐

Comments: _____

Strategic and operational planning toolkit

Putting the plans together

The following pages will guide you through the process of compiling the information you have gathered into a strategic and operational plan for your organisation.

This will consist of:

- mission statement
- values statement
- vision statement
- goals
- objectives
- planning grid.

A [Word template for your Strategic and Operational plan](#) is available online, along with a [Strategic plan brochure template \(Publisher format\)](#).

Strategic and operational planning toolkit

Putting the plans together: mission statement

1. Review the suggested mission statements (task sheet 11) looking for common phrases that can be grouped together into themes. See if you can keep grouping phrases until each phrase from each statement is in a group (theme).
2. Give a title to each of the themes, for example:
 - a strong emphasis on governance and management practices could be themed as administration
 - a strong emphasis on programs and the sport itself could be themed as participation or sport development.

You should now have themes made up of a number of phrases.

3. Summarise all the phrases for each theme into a succinct sentence. Where possible, try to use the original language.

You should now have a sentence for each theme, work all these themes into a single statement which describes what the organisation does. Try to use no more than two sentences if possible. Mission statements can consist of multiple themes.

For example:

The mission of <insert organisation name> is to <insert verb> the <insert target market> of <insert location> through <insert core services>.

The mission of <insert organisation name> is to <insert verb> the <insert sport> through <insert core services>.

4. Where possible try to use the original language.
5. Check that each theme has been included.
6. Seek approval for the mission statement from the organisation.

Strategic and operational planning toolkit

Putting the plans together: values statement

1. Review the suggested values statements (task sheet 12) looking for common themes that can be grouped together. See if you can keep grouping themes until each statement is in a theme area.
2. Give a title to each of the themes, for example some common values theme areas are respect, community, achievement, honesty, teamwork, partnership, determination, tolerance, innovation, accessibility, reliability or trust.

You should now have a handful of themes with a number of statements.

3. Summarise all the statements for each theme into a succinct sentence.
4. Where possible, try to keep the original language.
5. You should now have a handful of sentences, one for each theme. Work these sentences into a series of statements which describes the values of the organisation.

For example:

- we act with integrity
- integrity – we own our actions and we do what's right.

6. Select the strongest values statements (between 3 and 6 is common)
7. Check that each of the identified themes have been included.
8. Seek approval for the values statements from the organisation.

Strategic and operational planning toolkit

Putting the plans together: vision statement

1. Review the suggested vision statements (task sheet 14) looking for common phrases that can be grouped together. See if you can keep grouping phrases until each phrase is in a group (theme).
2. Give a title to each of the themes, for example:
 - A strong emphasis on governance and management practices could be themed as administration
 - A strong emphasis on programs and the sport itself could be themed as participation or sport development.

You should now have a handful of themes with a number of phrases.
3. Summarise all the phrases into one succinct sentence. Where possible try to use the original language.
4. You should now have a sentence for each theme. Work these sentences into a one to two sentence vision for the organisation, using one of the following introductions.

We strive for...

We are committed to...

The organisation will be...

The organisation creates...
5. Where possible, try to use the original language.
6. Check that each of the themes has been included.
7. Seek approval for the vision statement from the organisation.

Strategic and operational planning toolkit

Putting the plans together: goals and objectives

1. List the goals identified at the planning session (task sheet 15).
2. Review the objectives (task sheet 17) looking for common themes and group them together.
3. Combine the objectives ensuring you emphasise the common themes.
4. Ensure that all aspects of the objective are relevant to the goal.
5. Check that the objective relates to the SWOT analysis (task sheet 16) in that it:
 - plays to the goal strengths
 - improves on the goal weaknesses
 - takes advantage of the goal opportunities
 - minimises the goal threats.
6. Once you have drafted an objective for each goal check that the objectives together will enable achievement of the organisation's vision.
7. Where possible try to use the original language. Check that the words and language are consistent and identifiably belong to the participants.
8. Seek approval for the objectives from the organisation.

Strategic and operational planning toolkit

Putting the plans together: planning grid

1. Review the information supplied

Review it row by row, ensuring each strategy and action pans across completely and is strategic, measurable, acheivable, reviewable, and time-bound (SMART).

2. Review the strategies

Does each strategy enable the organisation to achieve its objective?

3. Review the actions

Does each action contribute to the implementation of the strategies?

4. Review the priority

Are the priority ratings realistic; is there a workable mix of high to low priorities?

5. Review the timeframe

Do the timeframes reflect the life of the plan?

Most strategic and operational plans have a three to five year lifespan and actions in the planning grids should fall due across the full breadth of the plan and not all in the first or final year.

Check that the timeframes are logical and chronological, that is that the actions are completed in the correct order.

6. Review the resources

Check that the organisation has considered the financial/material and human resources needed for each action and that the organisation has or will have the capacity to provide the required resources.

7. Review the responsibility

Check that responsibility has been allocated for all actions and that the workload is spread across the committee/organisation.

8. Review the performance indicators

Strategic and operational planning toolkit

Putting the plans together: checklist

Strategic plan

Is the name of the organisation clearly marked on the cover?

Does the plan have a title?

Does the title include a clearly defined time frame for the plan?

Is the status of the plan confirmed (final or draft?)

Does the plan include clearly articulated mission statement; values statement; vision statement; goals; objectives; strategies?

Does the plan include or appendix other key information: stakeholder analysis/PEST analysis/organisational history?

Operational plan

Does the plan clearly articulate the linkages between the objectives and strategies outlined in the strategic plan and the operational issues that need to be detailed on an annual basis?

Does the plan include a current staffing chart: including paid part time and volunteer staff?

Does the plan provide details about how the strategies will be achieved: actions, priority, timeframe, resources, responsibility and performance indicators?

Important points for all strategic/operational documents

Is the plan succinct and easy to read?

Is it a useful governance/management tool identifying the future directions for the organisation?

Can the plan form the basis of the information reported on in the annual review and annual report?

Is the plan realistic and achievable in terms of the organisations capacity (resources and skills) to deliver?

Have the key stakeholders of the organisation adopted/endorsed the plan?

Is there a clearly defined framework within the organisation for implementation of the plan?



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