

Action Planning – Business of Curling© Phase 2

Introduction

Simply put, strategic planning identifies where the organization is going over the next one to three years and how it's going to get there. The "strategic" part of this planning process is the continual attention to current changes in the organization and its environment, and how this affects the future of the organization. Skills in strategic planning are critical to the long-term success of your club. This form of planning includes:

- Taking a wide look around at what's going on outside the club and how it might affect you (an environmental scan).
- Taking a hard look at what's going on inside the organization, including its strengths, weaknesses, opportunities, and threats (a SWOT analysis).
- Establishing statements of mission, vision, and values.
- Establishing goals to accomplish over the next three years or so, because of what's going on inside and outside the organization.
- Identifying how those goals will be reached (strategies, objectives, responsibilities, and timelines).

Strategic planning determines the overall direction and goals of the organization. Consequently, strategic planning influences numerous aspects of the club's operation, including:

- What programs and services will be provided by the club and how those programs and services will be designed?
- The organizational design and roles are needed by the organization.
- Establish performance goals.
- Board committees should be developed.
- Resources are needed to reach those goals, and consequently, how much money is needed to procure those resources (amounts are needed for inclusion in fundraising plans).

Key Points

- The planning process is at least as important as the planning document itself.
- The planning process is never "done" -- the planning process is a continuous cycle that's part of the management process itself.

Step One - Visioning Exercise - Dreaming into the Future

Create a vision for success, and what it is hoped the curling club will be like in 3 to 6 years. Consider the following areas and outline the vision for each:

- Membership.
- Staff & Administration.
- Building & Property.
- Programs and Services.
- Atmosphere.

Tips: your vision should be...

- challenging and compelling – a stretch beyond what is comfortable. It should make people 'wiggle' a bit, in that it needs to be a reach, but feasible!
- rooted but focused on the future.
- easy to read and understand.
- able to capture the desired spirit of the club.
- compact – concise but clear.
- used to guide decisions.

Step Two - Assessment

The SWOT (strength, weaknesses, opportunities, and threats exercise) provides the current snapshot, situation, and circumstances of the club. The results create a 'picture' of where the club is at today.

Strengths: These are the characteristics, which contribute to the ability of the curling club to accomplish its goals. They describe what the curling club does best. For example: the strengths may be the commitment of the members to support curling events, the support of the business community, or the school in that it sponsors a youth curling program.

Weaknesses: These are areas that may hinder or limit the ability of the curling club to achieve its goals. These may include such areas as: increasing operational costs, the inability to attract enough volunteers or coaches, or perceptions about the club in the community.

Opportunities: Are there any shifts or trends that the curling club can capitalize on to strengthen the ability to accomplish the goals? The trends may include a shift in funding priorities, non-traditional partnerships, and/or shifts in the economy, social attitudes, or advances in technology.

Threats: Threats may vary from: increased competition from other sectors, stakeholders, or groups within or outside of the curling community.

Step Three - Analysis

Compare the two pictures: the assessment (SWOT) and the future (Vision).

- Where are the gaps?
- What is the club doing now that will help reach the vision?
- What will the club have to focus on to close the gap?

Once the SWOT has been identified there is a need to conduct a strategic analysis process considering the following options:

- Identify any similarities. Look at the strengths and opportunities and pull-out similar areas. At time the strengths of a club are parallel to the opportunities and thus should be enhanced and built upon, so seek ways to work with the strengths!
- Can something be "tweaked"? Can a shift somewhere in the club open a new opportunity?
- Are there strategies that can change a weakness to strength or reduce the threats?
- Develop strategies and priorities that will have the greatest degree of influence and have the highest factors for success. Add these strategies to the strategic plan.

Step Four - Mission and Values

The curling club's purpose (reason for being) in life is also known as a mission statement. What the club does, for whom, and how. On the surface, a mission statement may look like it states the obvious. It lays out the club's description of its business in broad term. A mission statement should include:

- What does the curling club do? What particular purpose does it serve? For example, does it exist to address member/client's needs?
- Whom does the club serve? With whom is it primarily concerned?
- How. This component of the mission describes how the club will achieve its mission. It may include a combination of processes through which the club delivers its programs and services.

Club values are the underpinning of the club. They, for example, guide decision-making, how people work together, and the types of programs and services and the methods used to deliver them. Values are standards or qualities that are the club's core benefits and convictions and they describe what the curling clubs stands for. Finally, values are expressed in day-to-day behaviors of the board, the members, and the staff of the club.

As you develop the values for your club, think about the following questions:

- What do we stand for?
- What are the ideal values and principles that guide us?
- What behaviors mirror these values?
- How do we want to be seen by our community?

Step Five - Goals and Objectives:

Define your goals and objectives. Describing what you are trying to achieve will help you focus on the who, why, when, and how of your planning process. Goals are the overall changes you wish to cause. Objectives are the short-term, measurable steps you take to reach your goal. The goals and objectives represent needs to be done to close the gap between the current situation and the ideal future. Worksheets are used to develop the goals and objectives. Two or three key goals will be identified.

Example of Goals & Objectives

Goal: We will provide and maintain facilities used for curling and curling related programs.

Objectives:

- Improve ice conditions with purchase of a new scraper.
- Improve and maintain pace of play policies.
- Encourage better communication between board and members.
- Develop more participation in bonspiels through better promotion.
- Increase the selection of bar-related products and services.
- Train staff in all areas of the operation.
- Decrease hourly wages while maintaining sufficient customer service.
- Keep ice area clean and litter free.
- Provide a more successful clinic and teaching program for our customers.

Step Six - Strategies:

Strategies take the club into action. They are the techniques or initiatives that, when complete, give staff and volunteers the green light. Participants will identify the two or three key strategies they feel will give their club the 'best bang for the buck'. The completed worksheets can be rolled up as a first draft of the plan.

Step Seven - Evaluation:

Developing an evaluation framework as part of the planning process allows a club to accurately measure progress. From this you learn how the components of your plan worked, what activities had the most impact, and where expectations were not met.

