

# 1 DIRECTION



**Plans provide your organisation with direction. They are your roadmap and travel plan. They highlight your destination, your mode of transport, the route you will take, how you are going to deal with hazards, who you will have on your trip and who you have to involve or take along for the ride.**

You can go on a journey without a roadmap or a plan, it will probably be a fun adventure, but it will also be risky and stressful. You will likely take some wrong turns, spend more money, miss important opportunities and maybe even leave some people behind. You may not even end up where you intended to end up, or where others expected you to be. You may not know when you actually reach your destination. In organisations you are entrusted to use your resources wisely to achieve the purpose intended by the founding document. You cannot go off on your own adventure, without the accountability and discipline required from a good plan.

There are different types of plans, with the strategic plan generally the key plan. All other plans deliver to the core goals in the strategic plan. It depends on the size of your group or the complexity of the project you are undertaking, as to how many plans you may need.

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## Steps for developing a strategic plan

1. **Know your purpose:** Your purpose is why you exist. It should be held within your founding document (trust deed or constitution). It is important that you have a clear view of your purpose.
2. **Create your vision/view of the future:** Your vision is your chance to describe what you / your community will look like or be like in the future. A vision should be aspirational (in other words something motivational to aspire to), it should also be related to your purpose and be realistic.
3. **Analyse the environment in which you operate:** There are many ways you can do this, two common methods are:
  - a. **SWOT** (Strengths, Weaknesses, Opportunities and Threats); and
  - b. **PEST Analysis** (Political, Economic, Social and Technological).
4. **Analyse the distance (gap) between your future and where you are now:** There are many ways you can assess the gap. A simple approach is to give yourself a score out of 10 (10 being fully achieved).
5. **Develop strategies to close the gap:** Consider the results of your analysis of the environment you are operating in.
6. **Identify barriers and risks to the successful implementation of your strategy**
7. **Develop an action plan for implementation:**
  - a. **Time frames** (so you know when you intend to have achieved things).

**b. Milestones** (things that will tell you that you are making progress).

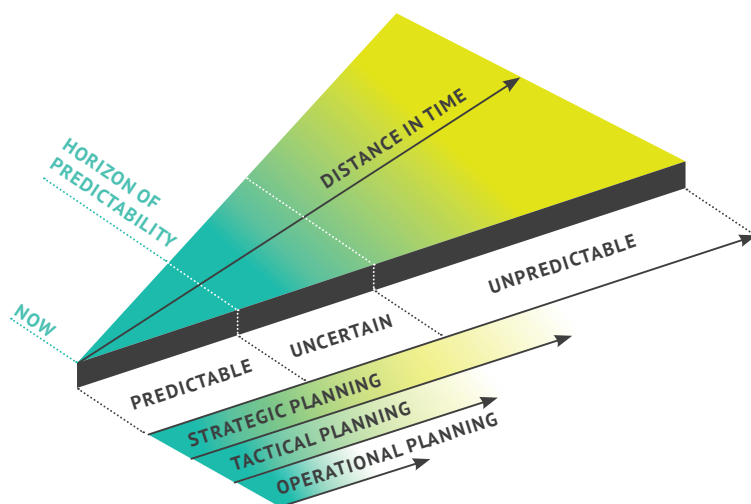
**c. Review steps** (to check if you are making progress as fast as you intended and in the right direction).

**d. Responsibilities** (making sure you know who will be undertaking your planned activities).

**e. All plans should be SMART** = Specific, Measurable, Achievable, Realistic and with a Timeframe.

**8. Create a calendar of planned activities to monitor progress.**

For plans to continue to remain relevant and provide value to an organisation they need to be regularly reviewed and modified. See on the right a simple model of planning cycle.



The planning horizon is how far ahead in terms of time an organisation should plan for, depending on the goal. This is also related to the level of complexity and risk.

There are cases where you can clearly see into the future and can set a course that will work for you for the next twenty years (i.e. large scale assets). There are also cases where the future is so uncertain that anything past the next six months is murky at best.

To determine your planning horizon, you need to have some sense of how clearly you can see the future environment in which your organisation will be operating, related to your goal(s).

## It is a good idea to set out a calendar of planning activities

<b>MONTHLY</b>	Monitor progress towards achieving your plan. Review milestones and KPI (Key Performance Indicators).
<b>ANNUALLY</b>	Review plan, amend actions as required to ensure it is still relevant. Acknowledge goals achieved and those not yet met. Set KPI for the year and review the annual plan/calendar.
<b>3 YEARLY</b>	Complete review of strategy and direction.

## In Summary

### Good planning:

- Fits the organisations need.
- Is realistic. It can be implemented.
- Is specific. You can track results against plan.
- Clearly defines responsibilities for implementation.
- Clearly identifies assumptions.
- Is communicated to staff and volunteers.
- Gets people committed.
- Is kept alive by follow up and planning process.

## MORE INFO



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