



buddle.

Future

Planning



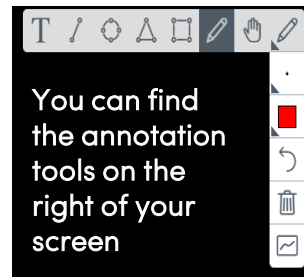
Welcome.

Your session will

begin shortly.

If you are using social media, please tag:
#Buddle, @SportEngland @SportStructures

Use this doodle box to try the annotation tools whilst you wait.



Before we start, please ensure that:

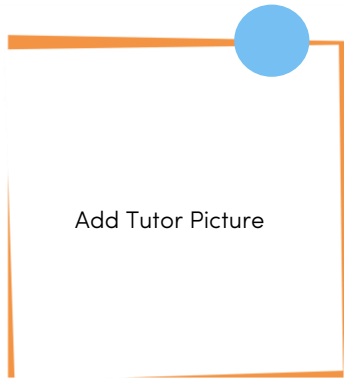


Your microphone is muted



You can see and use the chat box

A little about me...



- Insert name
- Insert Experience
- My favourite ...

... and you!

Add some info about you in the chat box:

- Your Club/Organisation Name
- Where you are based
- What would you like to gain from this workshop?

Learning Agreement

- Respect everybody
- Participate actively
- Use technology responsibly
- Be engaged
- Challenge each other positively
- Put phones on silent and return calls at an appropriate time
- Avoid sharing any personal/sensitive information outside of the session



What we'll cover:

By the end of this workshop, you will be able to:

- Understand what constitutes a business plan, its value, function and who should be involved in the process
- Begin developing a business plan using a simple framework
- Describe how to structure an effective business plan to meet the needs of their organisation
- Understand how to access further information to support business planning.

Why Plan?

For you:

- Clear goals and direction – shapes your thoughts
- Identifies where to focus time and energy
- Helps communicate your organisation plan within your organisation
- Identifies weaknesses and opportunities
- Motivates
- Identifies the resources your organisation needs
- Long term sustainability
- Identified how your organisation will measure impact

Why Plan?

For stakeholders (members, funders, sponsors etc):

- Helps communicate your organisations plan
- It tells the organisation story; past, present and future
- Demonstrates business control over your organisation
- Shows how your organisation will make a difference.

What is a business plan?

What is a business plan?

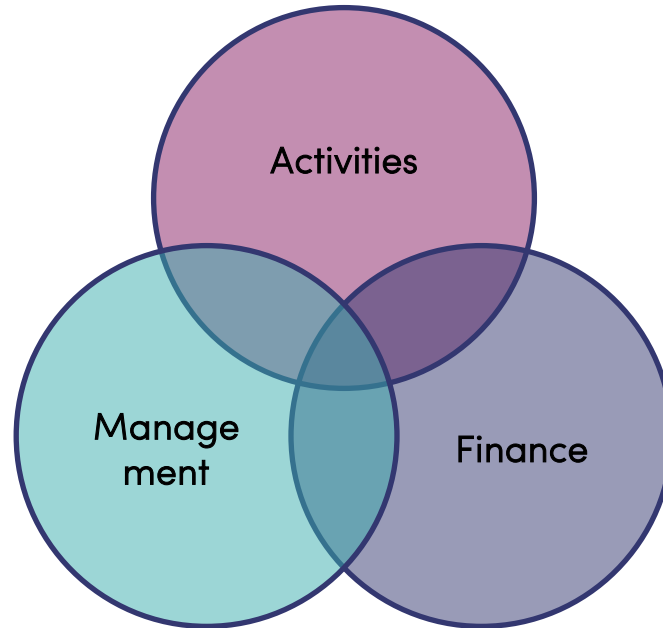
- Is a **decision-making** tool
- Sets out what **actions** you will use to implement your strategy and achieve your organisation **objectives** and **vision**
-
- Spells out **what** needs to be done, by **whom** and by **when**
- Focuses on **how** you are going to achieve rather than just **what** you are going to achieve.

A simple framework

In its simplest form, there are four major areas of focus to consider when developing a business plan:



3 pillars of a successful plan



Where are we now?



SWOT - exercise

Undertake a SWOT analysis for your organisation

Think about:

- What is the current position of your organisation?
- What do you do really well? What are you known for?
- What are the key limiting factors to you achieving your goals? How can you address these?
- What about your organisation keeps you awake at night?
- What are the local opportunities? Large school? New estate? Supportive local council? Supportive community?
- Who are your competitors? Other organisations? Other sports? Other leisure activities?

Where do you want to be? – Vision

A vibrant, healthy and progressive organisation that thrives on providing enjoyable tennis playing opportunities for all ages.

To provide a quality experience within a friendly and welcoming atmosphere.

To be the best community organisation within five miles of the organisation headquarters.

The organisation will play at the highest level. To be the recognised performance organisation in our community as well as a clear pathway for your players to start and progress.

What do you want your organisation to look like in 5-10 year's time?

Your vision

Set out a vision for your organisation that you believe in and are proud to share with your members

Business plan themes

Sport delivery

Objective: To provide competitive opportunities for all ages and genders
Strategy: Develop consistent competition and training programme

Facilities

Objective: To meet facilities requirements for Level X within 3 years
Strategy: Target investment into facility development

Financial

Objective: To ensure the organisation is financially managed well
Strategy: Ensure management of the accounts to make sure all expenses are covered and an agreed surplus is met

Commercial

Objective: To increase non membership revenues by 50%
Strategy: Focus on the off-the-pitch experience of families to encourage additional revenues

Workforce

Objective: To ensure all roles have a responsible person
Strategy: Focus on the right people supporting the delivery and management of the organisation activity

For each plan you would then want to consider: Actions – Personnel – responsibilities – Timeframe

Setting Your Objectives

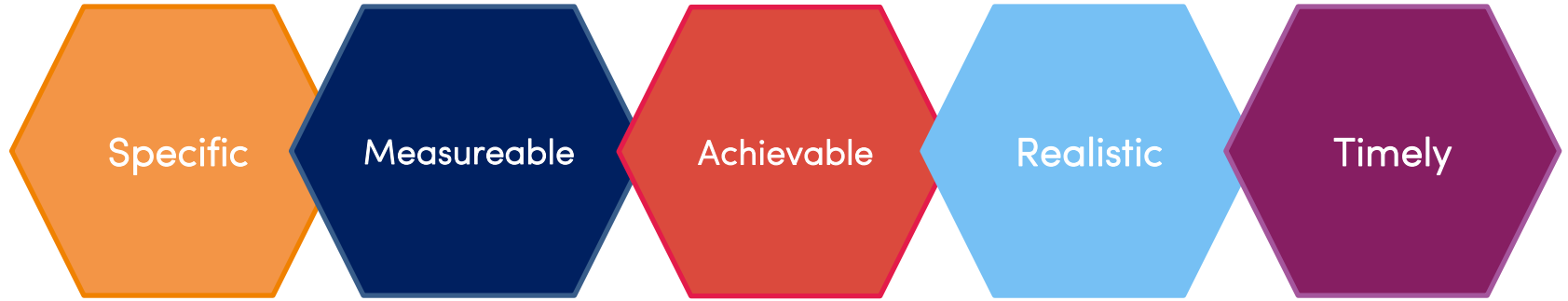
What are your organisation's goals for the next 3-5 years?

Think about:

- Thinking and planning together as an organisation
- Consider the different options and approaches your organisation could take
- What research can you do to help your organisation select the right goals to turn into objectives and actions? E.g. member surveys
- What did your SWOT analysis tell you?
- What goals can help your organisation move closer to their vision?
- What does your organisation need to consider in terms of Activity, Management and Finance?

Where do you want to be? - Objectives

When developing objectives, they should be SMART:



General:

Grow our membership



SMART:

Increase our junior membership by 20% over the next year

Where do you want to be? – Objectives example



Underpinning part of the Vision:

The organisation will play at the highest level possible but always operate on a responsible and prudent financial basis and always for the benefit of our members.

Within the next 5 years the organisation's objectives are:



- Activity: For the first team to be playing in the _____ league in 2 years.
- Activity: To provide an increase in coaching contact time by 50% to increase the skill level of players
- Management: To have fully qualified (level 2) coaches available for all age groups to ensure quality consistent coaching for all our teams, and to facilitate our first team being made up of local players.
- Financial: To achieve and annually maintain a financial surplus of at least 1 years estimated running costs.

Agreeing Your Objectives

Turn your goals into the key objectives for your organisation

Think about:

- Your research and SWOT
- Consider the goals you have identified, which ones are priorities for the organisation for the next 3 years?
- Which goals can become SMART objectives and therefore can become a reality?
- Do they help achieve the organisations overall vision?

Tell us your objectives...

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How do we get there? – Actions example

Example objective: To have fully qualified (level 2) coaches available for all age groups to ensure quality consistent coaching for all our teams, and to facilitate our first team being made up of local players.

- _____ to review current coaching methods and best practice, present to playing committee and organisation coaching policy to be agreed by January 2020.
- _____ to evaluate what current coaching resource (numbers and qualifications) we have and what we need in the long term by March 2020.
- _____ to produce coaching development plan. To be discussed and agreed by August 2020.

Your actions

Discuss and develop the actions your organisation needs to achieve its objectives.

Think about:

- What are the actions you need to focus on to turn your vision into reality and meet your objectives?
- What is the first action you are going to undertake?
- Who is going to be responsible for these actions?
- How long will this action take and when will it be completed by?
- What resources are required?
- Have you considered the overlap with objectives in Management and Finance?

Tell us your actions...

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Financial planning – things to consider

- Your action plan should highlight the **resources** you require to implement actions
- Extrapolate these into a **budget sheet**
- Consider the **existing resources** of your organisation and where you have **gaps**
- Identify how you are going to resource these **funding gaps** as a **finance objective** with **designated actions**
- Consider sources of **funding** including **grants and fundraising**.

How do you know you're there ?

- Agree regular time periods to review your business plan i.e. quarterly at committee meetings
- Setting clear objectives and actions will help you identify if you have achieved them or not
- Giving clear timescales on when actions need to be completed by
- Hold people responsible for actions
- Update your plan if and when things move.

Things to consider

Tailor to your audience

- Who will read it?
- What do they want to know?

Clear messages

- Can it be read and understood on its own?

Positive

- Does it leave me with a good impression?

Logical

- Does it flow and make sense?

Who should be involved?

Don't leave it up to one person!



Structure your plan

Summary

Introduction & organisation description

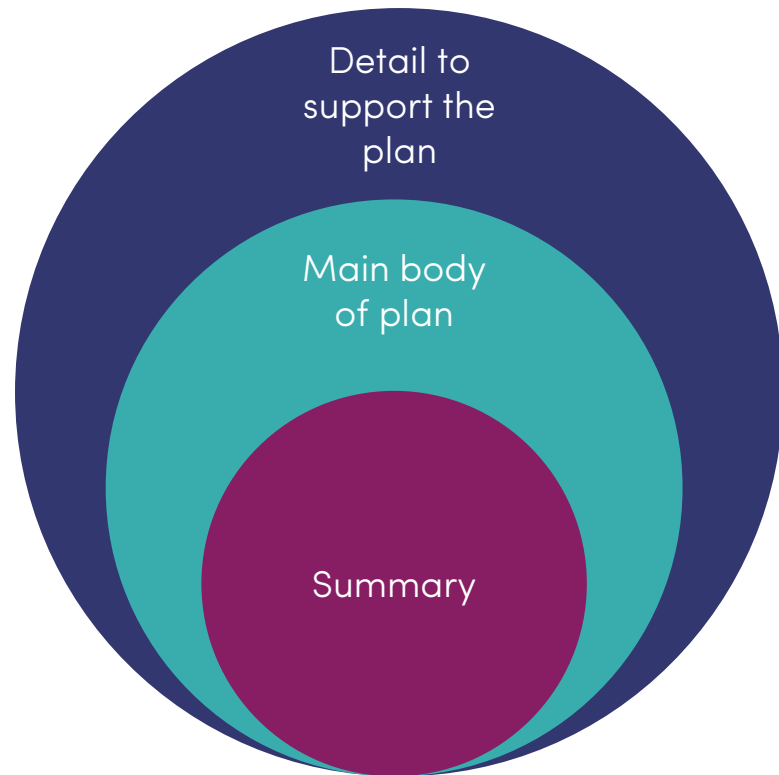
Where are you at?

Your vision and objectives

Action plan – how are you going to do it?

Financial plan

Appendices



When do I use my plan?

- Main agenda at Management/committee meetings
- Regular reviews – as frequent as appropriate
- AGM
- When making key decisions
- When applying for funding.

Your business plan is a living document

Top tips

- Start your **planning early** – time disappears faster than you think
- **Involve** the right people and discuss the plan with affected parties
- **Don't be afraid** to change the plan if circumstances change radically, but also try to plan for changes
- Set **realistic and achievable targets**; don't make the plan over-optimistic
- Get **help** where
- Above all, create a business plan and **use it** regularly you need it.

What will you take away from this session?



Any questions?



Please complete the evaluation



Good luck!

Feedback

Please take the time to fill in the evaluation survey by scanning the QR code.

Alternatively, the tutor will put the link in the chat box for you.

- Thanks in advance, the Buddle Team.



Recap:

By the end of this workshop, you will be able to:

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Getting Organised	Inclusion	Getting Help From People	Money Matters	Develop and Grow
Leadership and Governance	Your Culture and Values In Your Organisation	Maximising Your Volunteers Experience	Raising Money to Sustain Your Organisation	Promoting Your Offer Using Social Media
Exploring Legal Structures	Engaging different People		Financial Management	Creating a Marketing Strategy
Future Planning	Positive Experiences For All People		Dealing With Increasing Costs	Engaging your community

See future dates at www.Buddle.co

Thank you!



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