

## QUESTION: Do you have a Strategic Plan and what is its status?

- » *A **Strategic Plan** refers to a medium/long term plan that is used organisation-wide to guide the organisation towards achieving its vision.*

### Expectations:

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1. Evidence of a Strategic Plan in place that provides medium/long term guidance. (If not, why?).
2. The plan timeframe is appropriate for the organisation and operating environment (e.g. 3–5 years).
3. The strategic plan may be provided or directed by your national organisation (as relevant)
4. The strategic plan is available to members and stakeholders.

### Detailed Expectations for ‘Sustainable’ Organisations:

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1. Evidence of a Strategic Plan in place that provides medium term guidance. If not, why? (May be in development).
2. The plan timeframe is appropriate for the organisation and operating environment (e.g. 3–5 years).
3. The strategic plan may be provided or directed by your national organisation (as relevant). In some case the overriding plan of a governing organisation is used to dictate or guide regional organisations in their medium term direction with regions focusing on annual planning. Regions may choose the most applicable parts of the national strategy to guide them in annual/operational planning, in which case they may not have a separate strategic plan.
4. The strategic plan is available to members and stakeholders (as relevant). It may be on the organisation’s website or held by Board members and/or staff or at the organisation’s offices as a reference for members.

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation ‘High Performing’ or ‘World Class’. Examples are noted against the relevant Expectation number.*

1. Example

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#### Further Reference

[Price Waterhouse Coopers – Strategic planning, why do we plan?](#)

[SPARC – Strategic and business planning resource](#)

[SPARC – Planning templates](#)

[SPARC – Seminar Programme \(Strategic planning, development and delivery\)](#)

[Tasman RST SportAssist Resource – Strategic Planning](#)

[SPARC – Club planning \(ClubKit\)](#)

[SPARC – Club Strategic Plan template](#)

[BisVision – Strategy Planning Toolkit](#)

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ID Number: 426 Ref: B1.1-1

## QUESTION: How do you make sure key stakeholders have appropriate input into the development of your Strategic Plan?

### Expectations:

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1. Key stakeholders identified with face-to-face input into planning proactively sought.
2. Stakeholders understand that they are contributing to, rather than dictating, the plan.
3. Draft plan is circulated to key stakeholders for feedback.
4. Board/committee contributes and determines the 'high level strategy'.
5. CEO manages the overall process.
6. Staff and key stakeholders are involved at appropriate stages.
7. Board approve and sign-off final plan.

### Detailed Expectations for 'Sustainable' Organisations:

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1. Key stakeholders are identified and their input into the development of the Strategic Plan is proactively sought through face to face opportunities such as meetings, forums, workshops (where possible) and/or other communication.
2. Stakeholders understand that they are contributing to, rather than dictating the plan. Equally stakeholders should not be having the plan dictated to them (making the consultation with them pointless).
3. Draft plan is circulated to key stakeholders for feedback.
4. Board/committee contributes to the development and determines the 'high level strategy' (purpose, strategic direction/vision, strategic goals).
5. CEO manages the overall process. In a larger organisation the detailed management and actual planning steps may be handled by administrative staff (or external consultants), but the holistic overview and management sits with the CEO.
6. Staff and key stakeholders are involved at appropriate stages. This is typically in groups, but stakeholder feedback may be captured individually. The premise "the whole is greater than the sum of the parts" holds true in strategic planning and, if well-facilitated, feedback from a large mixed-representation group can drive very valuable thinking.
7. Board approve and sign-off final plan.

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

7. Every member of the Board and staff/volunteers physically sign off on the plan in a promotion event to display their buy-in and support.

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#### Further Reference

[SPARC – Strategic and business planning resource](#)

[SPARC – Planning templates](#)

[SPARC – Club planning \(ClubKit\)](#)

[SPARC – Seminar Programme \(Strategic planning, development and delivery\)](#)

[Tasman RST SportAssist Resource – Strategic Planning](#)

[SPARC – Club Strategic Plan template](#)

[BisVision – Strategy Planning Toolkit](#)

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ID Number: 203 Ref: B1.1-2

## QUESTION: What are your strategic challenges and opportunities?

### Expectations:

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1. Understand what enables/prevents the organisation achieving its Purpose/Vision.
2. Key challenges and opportunities identified through a robust process.
3. Common key strategic challenges (and risks) are covered.
4. Plan identifies significant opportunities and key strategies to capitalise on them.

### Detailed Expectations for 'Sustainable' Organisations:

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1. Understanding of what key strategic challenges and opportunities will enable, or prevent, your organisation from achieving its Purpose and fulfilling its Vision.
2. Key challenges and opportunities identified through a robust process (SWOT analysis is distilled down to manageable number of critical challenges and opportunities).
3. Common key strategic challenges include effective governance and leadership, financial sustainability, effective communication and stakeholder management, club/game participation and development, achieve international success, and increase internal capacity and capability. The plan identifies any significant risks and key strategies incorporate actions to mitigate them.
4. Plan identifies significant opportunities and key strategies to capitalise on them. Common opportunities may include modernising the sporting structure (i.e. restructuring traditional regions/clubs), changing the membership basis for individuals, establishing innovative product/service offerings for the casual market, maximising collaboration potential, taking on board new technologies etc)

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

1. Example

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### Further Reference

[SPARC – Strategic and business planning resource](#)

[SPARC – Planning templates](#)

[SPARC – Seminar Programme \(Strategic planning, development and delivery\)](#)

[SPARC – Seminar Programme \(Giving direction in the boardroom, strategic thinking and effective decision-making\)](#)

[Tasman RST SportAssist Resource – Strategic Planning](#)

[SPARC – Club planning \(ClubKit\)](#)

[SPARC – SWOT analysis template](#)

[BisVision – Strategy Planning Toolkit](#)

[Community Net – Review and Renewal](#)

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ID Number: 12    Ref: B1.1-4

## QUESTION: How do your strategic goals respond to your challenges and opportunities?

### Expectations:

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1. Provide a summary of strategic goals (or objectives/outcomes).
2. Strategic goals are not normal 'business as usual' activity.
3. Strategic goals are S.M.A.R.T. (i.e. Specific, Measurable, Achievable, Relevant, Time-bound).
4. Limited in number (4–6 likely to be ideal).
5. Clearly respond to the organisation's key challenges and opportunities.
6. Aligned with the purpose and vision.

### Detailed Expectations for 'Sustainable' Organisations:

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1. Provide a summary of strategic goals (or objectives/outcomes).
2. Strategic goals are not normal 'business as usual' activity. They are bigger picture goals that the organisation is striving for which will help it to achieve its vision. While BAU activity is critical to an organisations' ongoing success and will be key part of annual plans, it is not part of the strategic step-change or transformational goals that are considered in strategic planning. These are the goals your organisation plans to achieve to take it beyond the day-to-day state.
3. Strategic goals are S.M.A.R.T. – Specific, Measurable, Achievable, Relevant, Time-bound. Specific – get straight to the point about what you want to achieve, by who, by when, where, which way (requirements and constraints) and why. Measurable – be able to measure your current performance against the goal to show change. When you measure your progress you stay on track, reach your target dates and experience the exhilaration of achievement to spur you on to put more effort in to reach your ultimate goal. Achievable – Be realistic with targets so they're not too easy and not too difficult to attain. It must be an objective which you're both willing and able to work towards. Relevant – make sure they link to your organisation's vision and purpose and the environment you're operating in. Time-bound – targets are of no use unless they're set within a given timeframe to establish a sense of urgency.
4. Limited in number (4–6 likely to be ideal). Too many goals spread your resources and focus too thin. Selecting a small number of critical goals improves your staff/volunteers focus and increases your organisation's chances of achieving them.
5. Strategic goals clearly respond to the key challenges and opportunities your organisation faces.
6. Strategic goals are aligned with the purpose and vision (achieving the goals will enable the vision to be achieved and for the organisation to meet its obligations defined by its purpose).

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

1. Example

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### Further Reference

[SPARC – Strategic and business planning resource](#)

[Tasman RST SportAssist Resource – Strategic Planning](#)

[SPARC – Club planning \(ClubKit\)](#)

[SPARC – Planning templates](#)

[SPARC – SWOT analysis template](#)

[SPARC – Seminar Programme \(Strategic planning, development and delivery\)](#)

[SPARC – Seminar Programme \(Giving direction in the boardroom, strategic thinking and effective decision-making\)](#)

**BisVision – Strategy Planning Toolkit**

**Community Net – Review and Renewal**

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**ID Number: 16    Ref: B1.1-5**

## QUESTION: How do you make sure your Strategic Plan is realistic and achievable?

### Expectations:

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1. Plan is financially viable, sustainable, and incorporates multiple revenue streams.
2. Detailed financial forecast for the period of the plan.
3. Potential key roadblocks addressed as key challenges or managed as risks.
4. Appropriate stakeholder input/feedback on the ability to effectively deliver the plan.
5. Strategic Plan is reviewed annually to align with Annual Plan achievements.

### Detailed Expectations for 'Sustainable' Organisations:

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1. The Strategic Plan is financially viable, sustainable, and incorporates multiple revenue streams. The 'future state' of the organisation predicted once strategic goals are achieved is one that is sustainable.
2. Supported by a detailed financial forecast for the period of the plan. A budget has allocated expenditure towards achieving strategic goals which ensures goals chosen are financially sound.
3. Potential key roadblocks have been addressed as key challenges or managed as risks. (e.g. required stakeholder support, legislative impacts, technological capability and economic conditions).
4. Appropriate input and feedback by Board, staff and key stakeholders on the ability to effectively deliver the plan. Stakeholders with funding implications may be able to predict their likely future funding. Others may be able to indicate their own plans or knowledge of other external issues/events which may impact your delivery.
5. Strategic Plan is reviewed annually to evaluate progress and take into account changes required as a result of Annual Plan achievements or outstanding actions. (e.g. if annual plan targets around participation growth are not met, then the actions and targets required for the following year will need to be adjusted up in order to stay on track to the existing strategic goals/measures, or potentially the strategic goals need to be adjusted if it's clear they are no longer realistic and/or achievable within the timeframe).

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

1. Example

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#### Further Reference

[SPARC – Strategic and business planning resource](#)

[Tasman RST SportAssist Resource – Strategic Planning](#)

[SPARC – Club planning \(ClubKit\)](#)

[SPARC – Planning templates](#)

[SPARC – Seminar Programme \(Strategic planning, development and delivery\)](#)

[SPARC – Seminar Programme \(Giving direction in the boardroom, strategic thinking and effective decision-making\)](#)

[Alberta NFP – Financial responsibilities of not for profit Boards \(Canada\)](#)

[Community Net – Financial management in community organisations](#)

[Community Net – Planning and budgeting for IT equipment](#)

[Community Net – Sustainable funding](#)

[BisVision – Strategy Planning Toolkit](#)

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ID Number: 291 Ref: B1.1-7

## QUESTION: How is your Strategic Plan aligned within your sport?

### Expectations:

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1. Plan developed through consultative process.
2. Plan communicated and promoted.
3. Importance of alignment clearly communicated.
4. Support and guidance provided to dependent or closely affiliated organisations to ensure alignment.
5. Input and alignment with governing body proactively sought.

### Detailed Expectations for 'Sustainable' Organisations:

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1. Plan developed through consultative process. Consultation should include governing bodies as well as delivery arms that are governed by your organisation (as relevant) i.e. your entire sporting structure..
2. Plan communicated and promoted. Proactive communication and use of the internet and other relevant mediums to ensure the plan is widely accessible throughout your sport.
3. Importance of alignment clearly communicated. (e.g. the traditional sporting structure of sport with national, regional and club organisations is similar to a business with head office, regional branches and retail stores – alignment of planning allows the key aspects of strategy to be implemented by the various organisations within this overall sporting structure which drives the sport forward faster and with more focus. For example, where a national body is focusing on growth of participation, the regional and club levels have greater capability to make this happen on the ground)
4. Support and guidance provided to ensure alignment by regions, clubs, and other key stakeholders. (e.g. a road show by an NSO to present the national strategy to regions/clubs is a common method of support; or a process of peer review so RSOs review club strategies or NSOs review RSO strategies to ascertain alignment)
5. Organisation proactively seeking input and alignment with governing body (e.g. international body, NSO, RSO, club). Involving the relevant organisations in planning consultation and ongoing communication.

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

5. As an RSO completes their quarterly review against their strategic plan they share progress measures with the NSO, identify their focus for the next quarter and ask for input around changed national strategies and/or priorities that might influence their regional strategies and/or priorities.

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#### Further Reference

[SPARC – Strategic and business planning resource](#)

[Tasman RST SportAssist Resource – Strategic Planning](#)

[SPARC – Club planning \(ClubKit\)](#)

[SPARC – Planning templates](#)

[SPARC – Seminar Programme \(Strategic planning, development and delivery\)](#)

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ID Number: 370 Ref: B1.1-8

## QUESTION: How do you effectively communicate your Strategic Plan?

### Expectations:

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1. Communication to internal and external stakeholders.
2. Plan widely distributed and supported by face to face meetings, where appropriate.
3. Strategic Plan available on the website or other media.
4. Appropriate version of strategy simplified for audience.

### Detailed Expectations for 'Sustainable' Organisations:

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1. Communication to internal and external stakeholders. All staff and volunteers and stakeholder groups should be aware of the strategic plan and how it can be accessed.
2. Plan widely distributed and where appropriate supported by face to face meetings with key stakeholders.
3. Plan available on the website or other media (e.g. posters, flyers)
4. Appropriate version of strategy simplified for audience. 'Strategy on a Page' (SOAP) is a common concept that provides the key aspects of an organisations strategy in one page for sharing, which makes what can be a longer document more accessible for general audiences.

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

1. Example

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### Further Reference

[SPARC – Seminar Programme \(Effective communication with your stakeholders\)](#)

[SPARC – Seminar Programme \(Strategic planning, development and delivery\)](#)

[Tasman RST SportAssist Training Resource – Communication](#)

[SPARC – Creating a stakeholder communications plan](#)

[SPARC – Strategic and business planning resource](#)

[Tasman RST SportAssist Resource – Strategic Planning](#)

[SPARC – Club planning \(ClubKit\)](#)

[SPARC – Planning templates](#)

[SPARC – Strategic Leadership \(Running Sport Series\)](#)

[Good Practice Government – Stakeholder Engagement](#)

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ID Number: 430 Ref: B1.2-2



## QUESTION: How do you measure progress towards achieving your Strategic Plan?

### Expectations:

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1. Performance measures are in place and are S.M.A.R.T.
2. Measures based on outcomes not outputs.
3. Strategic goal measures indirectly indicate progress towards vision and purpose.
4. Regular action plan measures indicate aligned Strategic Plan progress.
5. Systematic annual review against strategic measures involving key stakeholders.

### Detailed Expectations for 'Sustainable' Organisations:

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1. Performance measures are in place and are S.M.A.R.T (Specific, Measurable, Achievable, Relevant (i.e. to vision), Time-bound).
2. Based on outcomes not outputs. An outcome measure is a measure of the success of a system while an output measures is a measure of activity, For example, the outcome measure could be the percentage of people who do not get polio. An output measure, for example, would be the number of people vaccinated with the polio vaccine. Care should be taken to define good outcome measures to use in determining the success of programs and in determining whether improvement projects result in improved outcomes.
3. Performance measures directly measure progress against strategic goals (and/or critical success factors) and hence enable monitoring of progress against vision and purpose.
4. There is regular reporting (quarterly) to the board on progress against key performance measures from the annual plan that is directly linked to the strategic plan.
5. There is a systematic annual review of the progress against the Strategic Plan and its key performance indicators with key stakeholders involved.

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

1. Example

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### Further Reference

[CompassPoint – Library of sample performance indicators](#)

[Community Driven Institute – Creating and measuring real outcomes](#)

[SPARC – Online survey tools](#)

[CEO Online – Using KPIs as an organisational scorecard](#)

[Community Net – Monitoring and Evaluation](#)

[SPARC – Strategic and business planning resource](#)

[Tasman RST SportAssist Resource – Strategic Planning](#)

[SPARC – Club planning \(ClubKit\)](#)

[SPARC – Planning templates](#)

[SPARC – Seminar Programme \(Strategic planning, development and delivery\)](#)

[Community Net – Triple bottom line reporting](#)

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ID Number: 18    Ref: B1.3-1

## QUESTION: Do you have an Annual Plan and what is its status?

- » An *'Annual Plan'* refers to an operational or business plan that is used organisation-wide for a one year period.

### Expectations:

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1. Evidence of an Annual Plan in place that provides short term guidance. (If not, why?).
2. The plan timeframe is appropriate for the organisation (e.g. aligned with the financial year and/or key events, i.e. 1 year).
3. The annual plan is available to staff, the Board and possibly other stakeholders (as relevant)

### Detailed Expectations for 'Sustainable' Organisations:

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1. Annual Plan in place that provides short term guidance (one year). If not why? (May be in development). Annual Plan may be referred to as an Operational Plan or a Business Plan. In some cases there will also be more specific plans in place (e.g. Coaching Plan, High Performance Plan, Marketing Plan etc) but there should be an overriding (or collated) Annual Plan.
2. The plan timeframe is appropriate for the organisation (e.g. aligned with the financial year, with key events etc).
3. The annual plan is available to the Board and staff possibly other stakeholders (as relevant). It may be on a organisational website, or at least held or accessible by key operational staff/volunteers.

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

1. Example

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### Further Reference

[SPARC – Strategic and business planning resource](#)

[Tasman RST SportAssist Resource – Strategic Planning](#)

[Community Net – Operational Planning](#)

[SPARC – Planning templates](#)

[Community Net – Planning and budgeting for IT equipment](#)

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ID Number: 19    Ref: B2.1-1

## QUESTION: How do you make sure your Annual Plan is linked to your Strategic Plan?

### Expectations:

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1. Evidence that Annual Plan is clearly developed from Strategic Plan (e.g. aligned goals or focus areas).
2. Clear alignment of relevant measures between Annual and Strategic Plans.
3. Business as usual activities are separated from actions related to the Strategic Plans.

### Detailed Expectations for 'Sustainable' Organisations:

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1. Evidence that Annual Plan is clearly developed from Strategic Plan. Many Annual Plan goals and/or key result areas are taken from the Strategic Plan. For example, with a strategic goal "to develop a sustainable administration structure by 2011" there could be many different courses to achieve this i.e. it may be through a multi-sport organisation with a shared paid administrator; or maybe through a formal arrangement with a regional Lions Club or Secondary School that provide a regular source of trained volunteers to deliver key admin aspects; or through hiring a part-time administrator but partially funding that role through contracted admin services to neighbouring organisations in the off-season etc. The plan to achieve the strategic goal, step by step each year, is indicated in action plans (e.g. scope out admin tasks needed by the organisation, identify available resources, understand neighbouring organisations needs and identify possible shared solutions, develop and implement chosen solution that maximises admin resources and fits within budget etc).
2. Relevant Annual Plan performance measures are developed directly from Strategic Plan measures. Often (but not always) annual plan measures will be output measures, the achievement of which will culminate into the achievement of a strategic outcome. For example, where a strategic plan has a targeted growth in participation rates over 3 years, then an annual plan will indicate the required growth target for this particular year. (i.e. with a strategic measure "to increase junior membership by 10% by 2013 (over 3 years)", then the 2010 year's Annual Plan measure may be "to increase junior membership by 4% in 2010". The measures will relate to the focus being put on that strategy in the current year (i.e. annual measure is not always 1/3<sup>rd</sup> of the strategic measure target, as different years may have a different emphasis or priority for different goals)).
3. Business as usual activities are separated from actions related to the Strategic Plans. Business as usual is clearly incorporated within the annual plan but typically won't appear in the strategic plan (unless it's part of a key strategic objective). (e.g. registering teams with the NSO, nominating participants for national rep trials, running the annual RSO club day may be standard annual calendar activities, but running a "multicultural have a go day" may be a new event/activity designed towards meeting a strategic goal to increase membership numbers/awareness from targeted cultural groups).

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

1. Example

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#### Further Reference

[SPARC – Strategic and business planning resource](#)

[Tasman RST SportAssist Resource – Strategic Planning](#)

[SPARC – Planning templates \(Annual business plan template\)](#)

[Community Net – Operational Planning](#)

[SPARC – What are strategic and operational plans? \(ClubKit\)](#)

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ID Number: 22    Ref: B2.1-3

## QUESTION: How does your Annual Plan effectively guide achievement of operational activities?

### Expectations:

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1. The Annual Plan identifies initiatives/projects/actions in detail.
2. Each action has assigned responsibilities and timeframes.
3. Each action has allocated financial and people resources.
4. The Annual Plan is used to develop annual performance plans for staff.

### Detailed Expectations for 'Sustainable' Organisations:

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1. The Annual Plan identifies initiatives/projects/actions in enough detail to provide guidance to staff/volunteers over the year. This typically means identifying what, by when, by whom, and with what resource (as below) Sometimes an Annual Plan will have other operational plans linked to it that provide even more detail (e.g. Marketing Plan, Coaching Plan, Financial Plan).
2. Each action has assigned responsibilities and timeframes. These responsibilities and timeframes can then be reported against regularly to clearly monitor progress (e.g. the CEO or Coach Development Officer or Finance Manager roles would each be accountable for different actions that may align to their role or be additional to it for that year).
3. Resources are allocated against actions in the plan including staff/volunteers and budget. Assigning resources ensures the Annual Plan remains realistic and achievable within the context of the sport at this time.
4. The Annual Plan is used to develop annual performance plans for staff/volunteers. Job/role descriptions typically describe standard role expectations and ideally include specific accountabilities to managing that person (whether paid or unpaid), and allow easy tracking of performance toward the overall organisation achieving its Annual Plan goals.

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

1. Example

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#### Further Reference

[SPARC – Planning templates \(annual business plan template\)](#)

[SPARC – Club operational plan template](#)

[SPARC – Strategic and business planning resource](#)

[Tasman RST SportAssist Resource – Strategic Planning](#)

[SPARC – A simple marketing plan](#)

[SPARC – A detailed marketing plan](#)

[Community Net – Operational Planning](#)

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ID Number: 24    Ref: B2.1-5

## QUESTION: How do you effectively communicate your Annual Plan?

### Expectations:

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1. Annual Plan communicated to staff, volunteers and any relevant stakeholders.
2. Staff understand their roles and responsibilities in contributing to the Annual Plan.
3. Annual Plan used regularly to manage organisational activity and progress.

### Detailed Expectations for 'Sustainable' Organisations:

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1. Annual Plan communicated to staff, volunteers and any relevant stakeholders. This may involve having a complete copy of the plan, or a summary document, or aspects that relate just to their role/involvement. All staff, volunteers and relevant stakeholders should be aware of the annual plan and how it can be accessed.
2. Staff understand their roles and responsibilities in contributing to the plan. i.e. they are involved in development of plan, have individual performance plans based on the plan, and the Leader (CEO) ensures clear understanding.
3. Annual Plan used regularly to manage organisational activity and progress. For example, the annual plan is referred to during team meetings, one on one staff meetings etc as the key guide for staff/volunteer activity, timeframes, priorities and accountabilities.).

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

1. Performance against plan monthly/quarterly is used to continually communicate and reinforce the Annual Plan to staff/volunteers.

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### Further Reference

[SPARC – Strategic and business planning resource](#)

[SPARC – Seminar Programme \(Effective communication with your stakeholders\)](#)

[Tasman RST SportAssist Training Resource – Communication](#)

[SPARC – Creating a stakeholder communications plan](#)

[SPARC – Planning templates](#)

[SPARC – Strategic Leadership \(Running Sport Series\)](#)

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ID Number: 145 Ref: B2.2-1

## QUESTION: How effectively have you performed against your Annual Plan measures?

### Expectations:

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1. Evidence of a high success rate against performance measures set in the previous Annual Plan.
2. There is good progress against current annual plan performance measures.
3. Current individual progress measures are trending positively to meet targets.
4. Individual workload results indicate 'balance' is being effectively managed.

### Detailed Expectations for 'Sustainable' Organisations:

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1. There was a high success rate against the performance measures (KPI's) set in the previous Annual Plan. Evidence of adjustments made based on previous results so new measures are S.M.A.R.T. (e.g. underperformance on any aspect in previous year/quarter assessed for underperformance or whether measures were achievable/relevant).
2. Quarterly reviews show positive trends for progress towards current performance measures (these are often referred to as Key Performance Indicators or KPIs). Where progress is not on track, reasons are clear and individual measures, accountabilities or actions have been adjusted as relevant. Measures might include trends in participation segmented by participant groups, high performance completion/event results, financial profitability/sustainability results, measures of sports delivery channel success, customer satisfaction (i.e. clubs, RSOs, participants, stakeholders etc), human resource measures etc
3. Individual progress measures are trending positively to meet targets (or evidence that underperformance has been analysed with accountable people managed or targets adjusted as relevant). For example, the coaching coordinator may have quarterly measures around the number of coaches trained or the number of potential junior coaches that have attended introductory coach training workshops etc.
4. Individual workload results indicate 'balance' is being effectively managed. For example, monthly administration hours of key volunteers/staff are remaining below target (or if not the case then workload sharing has been clearly implemented).

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

1. Example

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#### Further Reference

[CompassPoint – Library of sample performance indicators](#)

[Community Driven Institute – Creating and measuring real outcomes](#)

[Community Net – Monitoring and Evaluation](#)

[SPARC – Governance evaluation system](#)

[CEO Online – Using KPIs as an organisational scorecard](#)

[Tasman RST SportAssist Resource – Strategic Planning](#)

[SPARC – Online survey tools](#)

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ID Number: 553 Ref: B2.3-2

## QUESTION: How do you make sure your Annual Plan is responsive to changes in your operating environment?

### Expectations:

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1. Annual Planning cycle articulated and documented.
2. Board and staff have regular opportunities to review plan currency and relevance.
3. Spending and priorities reviewed regularly to assess their impact on performance.
4. The Annual Plan is considered to be a 'live' working document.
5. Changes to the plan are made systematically but in a responsive and agile manner.
6. Timing and processes for review of key programmes is built into the Annual Plan.

### Detailed Expectations for 'Sustainable' Organisations:

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1. Annual Planning cycle articulated and documented.
2. Board and staff have regular opportunities to review the plan to ensure it remains relevant and up-to-date. Board reviews may simply be via a summary of RAG-indicated measures as they should not be overly focused on operational aspects. Staff should be working on their accountabilities within the annual plan at all times, so a weekly or fortnightly individual review is likely. The CEO is expected to complete a monthly review as part of reporting to the Board.
3. Spending and priorities are reviewed regularly to assess the impact of investment decisions on performance.
4. The Annual Plan is considered to be a 'live' working document. Considered changes are made as a result of changes in the environment and organisational priorities (e.g. the global recession significantly impacting funding bodies, swine flu epidemic changing the dynamic around competition/events, international sporting rules changes, change in government policy etc)
5. Changes to the plan are made systematically but in a manner that is responsive and agile. Changes are not made 'willy nilly', but may be deemed necessary (e.g. at the end of a quarter) to reflect significant changes in the operating environment. Ideally a process for identifying, prioritising, authorising and implementing necessary annual plan changes is in place.
6. The plan includes information on the likely timing and intended process for evaluation and review of the key programme(s). (e.g. often reviews will be timed for the end of a season or prior to the strategic planning round)

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

1. Example

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#### Further Reference

[SPARC – Strategic and business planning resource](#)

[Tasman RST SportAssist Resource – Strategic Planning](#)

[Community Net – Operational Planning](#)

[SPARC – Planning templates](#)

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ID Number: 295 Ref: B2.4-1