1. Planning

1.1 Planning Fundamentals

1.1.2 What is planning?

There are four levels of planning that the Queensland Rugby Union recommends to Rugby clubs and Sub-unions:

1) Strategic Planning
2) 3 Rolling Operational Plan
3) Annual Operational Plan
4) Cash Flow Budget

HOW DO YOU PLAN?

Planning begins with consultation with your stake-holders.

The Queensland Rugby Union recommends a PLANNING FORUM at which all Rugby stake-holders can be represented and contribute to the potential content and scope of the plan.

The Queensland Rugby Union is able to provide staffs that are expert in conducting planning sessions that conform to the needs of Rugby organisations.

WHAT HAPPENS AT A PLANNING FORUM?

The forum usually follows a set format that develops a strategic picture of the organisation and its needs and desires.

It is normal to spend some time considering: the internal and external environments in which Rugby is occurring in the club or region the current performance status of the club or region through a SWOT Analysis what ideal performance would look like and how the club or region identify with this ideal goals that may drive the performance of the club or sub-union the possible strategies the club or sub-union may undertake to achieve the goals. Additional workshops will need to be held by sub-groups to complete the operational components of planning.

WHAT IS A STRATEGIC PLAN?

A strategic plan is actually a very simple document.

It will be the primary result of the planning forum and once published an adopted will drive all planning for the term of the plan.

A strategic plan will contain the following:

• Organisational Purpose

The purpose of an organisation is described in its articles of association.

The planning forum will normally develop a fuller and more inspiring description of the purpose of the organisation.

It should not, however, be in conflict with the articles of association. If it is, then some form of constitutional review is required.

• Vision

This is a statement which clearly articulates where the club or sub-union desires to be at some point in the future beyond the conclusion of the plan timeline.

The vision is an opportunity to be idealistic and inspirational. It should describe the end point, but the path or process required to travel there.

• Major Goals

The purpose of an organisation is normally described in its articles of association.

The planning forum will normally develop a fuller and more inspiring description of the purpose of the organisation.

It should not however be in conflict with the articles of association. If it is then some form of constitutional review is required.

The QRU would recommend that Rugby clubs and sub-union target around 5 major goals.

- Key Result Areas

The key result areas are those variables which will require change to achieve the goals.

- Key Result Indicators

Each KRA will have one or more key result indicators that will provide a clear and unambiguous measure of performance.

The KRI will provide both motivation and accountability to the activity that results from the plan.

- Strategies

One or more strategies will be stipulated as the desired process for achieving each goal.

They should be expressed at a strategic level and should not be operational in nature. If they are, then the scope of the plan may have been too narrow. For example:

"To improve financial management procedures" is strategic, while "To purchase the latest upgrade of MYOB" is operational.

- Additional

It is normal to provide some additional documentation that supports the explanation of the plan. These may include:

- A SWOT (Strengths, Weaknesses, Opportunities and Threats)

- An environmental overview

- Relevant historical information of the past performance and culture of the club or sub-union

WHAT IS A 3 YEAR ROLLING OPERATIONAL PLAN?

A 3 year rolling operational plan simply breaks each strategy into 3 annual operational steps.

Because of its operational nature the 3 year rolling operational plan is normally completed by a small sub-group with expertise and/or a stake in this area of performance relating to a major goal.

Major Goal	As per the strategic plan
Strategy	As per the strategic plan
KRIs	As per the strategic plan
Actions	As per the relevant year of the 3 year rolling operational plan
Responsibility	Who is going to do it?
Timeline	By when must it be completed?
Resources	What do you need to achieve the task?
Budget	What will it cost?
Outcome	What is the measure of successful completion?

CASH FLOW BUDGETING

After the availability of people to action the plan, availability of money is the next most common reason why plans fail to be successfully implemented.

The operational plan must be costed as part of the annual cash flow budget so that tasks are realistic in their scoping.

In combination with prior quality financial reporting a costed operational plan will assist in producing a quality cash flow budget.

PLANNING TO PLAN

It is imperative that Rugby clubs and sub-unions "plan to plan". The QRU recommends that any club or sub-union plan targets the following criteria:

Planning
Finance
Governance
Human Resources
Facilities
Competition Management
Participation

Above all it is the effective planning of future, regular and successive planning strategies, policies and actions which will ensure that the club or sub-union continues to develop the quality and quantity of its business and services.

ADDITIONAL REFERENCES AND RESOURCES

QRU Community Rugby Strategic Plan 2005-2007
QRU Community Rugby 3 Year Rolling Operational Plan 2005-2007
QRU Strategic Plan Executive Summary Template
QRU Annual Operational Plan Template
QRU Financial Management Package