# Completing your Business Plan

**HOW TO USE THE BUSINESS PLANNING TEMPLATE**

|  |  |
| --- | --- |
| 1. | Read the Business Planning Template and familiarise yourself with all the sections |
| 2. | Ensure you have completed a current Operational Health Check and received your Summary Report |
| 3. | If your organisation does not have a Strategic Plan, use the template provided within the appendices to identify your organisation’s vision and mission |
| 4. | Aim to complete all sections, however prioritise areas most relevant - don’t tackle it all at once!   * + Recommended baseline information to include is highlighted in yellow   + To complete these fields double click on text to highlight and then type over (example below) |
| 5. | * + Added value ideas and guidance *‘Hints & Tips’* are provided throughout   + Delete these notes once complete (example below) |
| 6. | Contact your Participation Leader / Member Association with any questions or to review your plan |

**Delete this page once complete**

# Annual Business Plan

**Insert name of club / venue**

# Insert year (e.g. 2016/17)

<Insert image / logo here>

**By:** Insert name of person(s) / group who completed the Plan

**Preparation Date:** Insert month and year the Plan was prepared

**Business Plan Period:** Insert year the Plan is applicable to (e.g. 2016/17)

**COMMERCIAL AND IN CONFIDENCE**

This document and any of its contents are not to be copied, distributed or divulged to any person or organisation without the express permission of insert name of organisation. All information is considered commercially sensitive and is provided in confidence.

***Executive Summary***

* Introduce your club and its people, including office bearers and current service deliverers / coaches
* Identify your key stakeholders and partners
* Include your clubs values (from your Strategic Plan)
* Provide context for the reader about the location of your venue and opportunities available
* Give the reader a clear and succinct overview of the Business Plan
* State how the Annual Business Plan links to your Strategic Plan
* Make a short but strong case that explains the direction of your organisation and commitment to the Plan

***Hints & Tips (delete this box once complete)***

* *Complete this section last*

***Acknowledgement***

This Business Plan for insert name of organisation for the insert year (e.g. 2016/17) year has been developed with and approved by insert who the plan is approved by (e.g. club committee). I hereby acknowledge that this Business Plan was adopted on the insert date.

|  |  |
| --- | --- |
| On behalf of insert name of organisation | |
| Name: | Signature: |
|  |  |
| Position: | Date: |
|  |  |
|  |  |

***Background***

* Outline a brief history about the organisation and current position (e.g. structure, developments)
* Provide a high level explanation of your organisation; recommended information to provide includes:
  + Programs & services
  + Café & merchandise
  + Signage & sponsorship
  + Competitions & tournaments
  + Community outreach & events
  + Administration & venue management
  + Maintenance & capital projects
  + Achievements and successes (referencing previous targets)
  + Past & present challenges )how they were overcome or currently being addressed)
  + Plans for the future

***Hints & Tips (delete this box once complete)***

* *Specify any other information and qualities that makes your organisation distinctive and unique*

***Strategy***

* Provide a high level interpretation of your Strategic Plan
* Describe the rationale for the strategy (why)
* Explain how the Business Plan aims to achieve the strategic goals

***Hints & Tips (delete this box once complete)***

* *Make sure the organisation has a Strategic Plan and use the template provided for guidance*
* *Include the Strategic Plan within the appendices*
* *Explain how the strategy aligns to Tennis’s vision:*
  + *Member Associations strategic priorities (contact your Places to Play team for information)*
  + *Four pillars (Accessibility, Sustainability, Community Benefit & Accountability)*

***Description of Current Operations***

* Describe the organisations current resources and structure, including affiliation to Member Association
* Outline responsibilities of the committee members / employees / coaches / professional staff / volunteers
* Note any legal requirements for your organisation and its venue (e.g. lease / contractual requirements, council restrictions)
* Provide information about asset management responsibilities and link to relevant documentation (e.g. Maintenance Plan)

***Hints & Tips (delete this box once complete)***

* *Use this section to describe in more detail the products and services on offer at your venue*

***Current Performance Review***

* Provide information and overview of your organisation’s performance in the last 12 months

***Hints & Tips (delete this box once complete)***

* *Complete the relevant information in the ‘Current Performance Review’ table and provide overview here*
* *Reference information such as:*
  + *Historical data*
  + *Previous business plan*
  + *Current strategic plan*
  + *OHC results & national medians*
  + *Responsibilities in the lease / management agreement*
* *Using this information, answer the following questions:* 
  + *Do programs meet the needs of both regular users and wider community? If so, how?*
  + *What are the reasons for increase or decrease in performance?*
  + *What areas are under or over serviced and why?*

***Hints & Tips (delete this box once complete)***

* *Complete the ‘Current Performance Review’ table in the appendices and provide overview here*
* *Data from your OHC can be included*
* *Use quantitative and qualitative data, examples are provided and can include:* 
  + *Membership numbers & breakdown of demographics*
  + *Number of estimated overall visits*
  + *Program timetable, number of participants per program and in total*
  + *Coaching hours offered and number of students*
  + *Number and duration of competitions and tournaments*
  + *Types of community engagement and outcomes*
* Evaluate current performance against previous benchmarks and goals

**Insert name of organisation** **SWOT Analysis**

|  |  |
| --- | --- |
| **Strengths** | **Opportunities** |
| ***Hints & Tips (delete this box once complete)***   * *Action plan should aim to sustain identified* ***strengths*** | ***Hints & Tips (delete this box once complete)***   * *Action plan should reflect identified* ***opportunities*** |
| **Weaknesses** | **Threats** |
| 3.  ***Hints & Tips (delete this box once complete)***   * *Action plan should have items included that* *overcome some of the identified* ***weaknesses*** | ***Hints & Tips (delete this box once complete)***   * *Action plan should have items included that* *overcome some of the identified* ***threats*** |

***Market research***

* Provide information about the demographic profile of your organisations local area and target markets
* Describe how products and services your organisation offers are aligned to key stakeholders
* Identify other local tennis organisations and their offerings (e.g. pricing, programs, facilities and services)
* Identify local competitors (e.g. other sport and leisure activities and their offerings)

***Hints & Tips (delete this box once complete)***

* *Identify and link how products and services align to stakeholders by referencing key documents (e.g. Local Government Area Sport & Recreation Plans, MA Strategic Plan)*
* *Reference relationships with other tennis organisations (e.g. cross venue promotion)*
* *Establish where your organisations current proposition sits within the market:*
  + *Do you compliment or compete with other tennis organisations?*
  + *What are the pro’s / cons of your facilities when compared against the local market?*
* *Contact your MA for further information to include in this section*

***Strategic Vision Reflection***

* Our vision and mission for insert name of organisation is insert vision and mission
* The following goals and objectives will help us achieve our strategic vision by insert statement to link your organisation’s vision (future) and mission (overall purpose) to the goals (what needs to be achieved) and objectives (specific steps to reach the goals)

***Business Goals & Objectives***

***Hints & Tips (delete this box once complete)***

* *Outline the long term (5 years) goals and objectives to achieve your organisations vision and mission*
* *For example, a goal could be ‘to achieve success in Hot Shots Leagues’ and the objectives to achieve this by ‘Establishing pathway from red ball coaching to orange ball leagues’ and ‘Promoting red ball coaching within local schools’*

|  |  |  |
| --- | --- | --- |
| **No** | **Over the next 12 months we will achieve (goals)** | **We will achieve this by (objectives)** |
| **1** |  |  |
| **2** |  |  |
| **3** |  |  |

***Action Plan***

* Provide a brief introduction to your Action Plan, highlighting any priorities, staged actions etc.

***Hints & Tips (delete this box once complete)***

* *Complete the ‘Action Plan’ table in the appendices and provide overview here*
* *Include all items, goals, targets and responsibilities to support planned growth, sustainability and meet long term strategy*
* *The action plan (how) should link back to the following information provided within the Business Plan:*
  + *Description*
  + *Current performance review*
  + *Market research*
  + *Strategy*
* *Use the SMART principle to complete this section*
  + ***S****pecific*
  + ***M****easureable*
  + ***A****chievable*
  + ***R****elevant*
  + ***T****ime-bound*
* *Refer to plans, details and estimates of proposed maintenance or capital works over 3 years*
  + *Provide relevant documentation within the appendices*
  + *Ensure facility maintenance and renewal is being planned by the responsible party*
  + *If facility maintenance and renewal is your organisations responsibility, feedback to the asset owner (e.g. council)*
* *Identify your marketing and communications approach, linking to relevant documentation (e.g. website, Facebook)*
* *Any agreed items within the action plan should be reflected in the finance section of your business plan (i.e. Align plans to budget, cash flow etc.)*

***Finance***

* Link financial resources to the goals / targets / actions set out in the Action Plan
* Showcase how the organisation plans to be financially sustainable and maintain positive cash flow with provision for future development (sinking fund)
* Ensure your organisation will meet obligations in line with responsibilities (e.g. through occupancy agreements, loans etc.)

***Hints & Tips (delete this box once complete)***

* *The financial forecast should cover a minimum of a 3 year period and summarise the following:*
  + *Income & expenditure (including detailed lines)*
  + *Balance sheet*
  + *Cash flow statement*
  + *Operational budget (including projections and provisions for maintenance & capital works)*
* *When linking financial resources to goals / targets / actions, base these on forecasted results over the 3 years*
* *Reference any targeted / planned grant applications*

***Appendices***

**Insert year Insert name of organisation Current Performance Review**

***Hints & Tips (delete this box once complete)***

* *This template is an example* ***containing suggestions only***
  + *Remove lines as applicable (highlight entire row, right click, left click delete, left click delete entire row, left click ok)*
  + *Add lines as applicable (place curser at end of row, click enter / return)*
  + *Use information from your OHC to complete the template by adding rows to correspond with benchmarks relevant to your organisation*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Category** | **Sub-category** | **Current Performance**  **(Insert year)** | **Previous Performance**  **(Insert year)** | **Summary / Key Insights** |
| Reporting (OHC) | Performance |  |  |  |
| Venue usage | Annual visits / occupancy |  |  |  |
| Memberships |  |  |  |
| Coaching students |  |  |  |
| Community use |  |  |  |
| Court usage | Occupancy |  |  |  |
| Financial performance | Income |  |  |  |
| Expenditure |  |  |  |
| Management | Sinking fund contribution |  |  |  |
| Volunteer hours |  |  |  |
| Hours directly supervised |  |  |  |
| Maintenance | Repairs |  |  |  |
| Renewal |  |  |  |
| Governance | Committee |  |  |  |
| National programs | Hot Shots |  |  |  |
| Cardio tennis |  |  |  |
| Fast 4 |  |  |  |

**Insert year Insert name of organisation Action Plan**

***Hints & Tips (delete this box once complete)***

* *This template is an example* ***containing suggestions only***
  + *Remove lines as applicable (highlight entire row, right click, left click delete, left click delete entire row, left click ok)*
  + *Add lines as applicable (place curser at end of row, click enter / return)*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Area** | **Performance** | | **Actions** | **Lead** | **Priority** | **Deadline** |
| **Current** | **Target** |
| Membership | 50  (junior members) | 55  (+10% juniors) | • schedule additional Hot Shots  • Create school partnerships | Coach | High | June 2017 |
| Social use | 200 visits per week | 240 visits per week  (+20% social visits) | • Scope options for function space  • Promote and market to new user groups  • Advertise party packages | Secretary | Medium | November 2016 |
| Asset improvements | 60% user satisfaction  (2014/15 member survey) | 80% user satisfaction (20% increase) | • Install shade structures  • Develop changing rooms | Manager | Low | 2019 |
|  |  |  |  |  |  |  |

**Insert name of organisation Strategic Plan**

*E.g.* *Bring communities across all generations together through tennis*

**VISION**

***Hints & Tips (delete this text once complete):*** *Describe where the organisation would be in the future if achieves all strategic goals (refer to example)*

**MISSION**

*E.g. Promote an inclusive tennis environment servicing all members and guests of the community, ensuring positive experiences for all those involved with the sport by demonstration of our values and driving the success of our strategic pillars.*

***Hints & Tips (delete this text once complete):*** *Communicate your organisation’s purpose and direction to all stakeholders (refer to example)*

**VALUES**

*E.g. Diversity, respect, fun & commitment*

***Hints & Tips (delete this text once complete):*** *List the guiding principles / beliefs / identity of your organisation to guide behaviors and actions (refer to example)*

**STRATEGY**

*E.g. Accountability*



*E.g. Sustainability*



*E.g. Accessibility*



*E.g. Community Benefit*



***Hints & Tips (delete this text once complete):*** *Identify how your organisation plans to achieve long term goals (refer to examples)*

**PRIORITIES**

*E.g. Agreement renewal and increasing junior memberships*

*E.g. Schools partnerships & Hot Shots Leagues*

*E.g. Operational Health Check*

*E.g. Book A Court*

***Hints & Tips (delete this text once complete):*** *Provide the areas of focus to achieve your strategy & measure success (refer to examples)*