

# Managing Strategically



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### *Objectives*

After reading this chapter, you should be able to do the following:

- Work with your Board to develop a strategic plan.
- Prepare effectively for the strategic planning process.
- Carry out a strategic diagnosis of your organisation.
- Develop and implement plans in order to achieve strategic objectives.
- Assist your Board in evaluating the effects of the strategy.

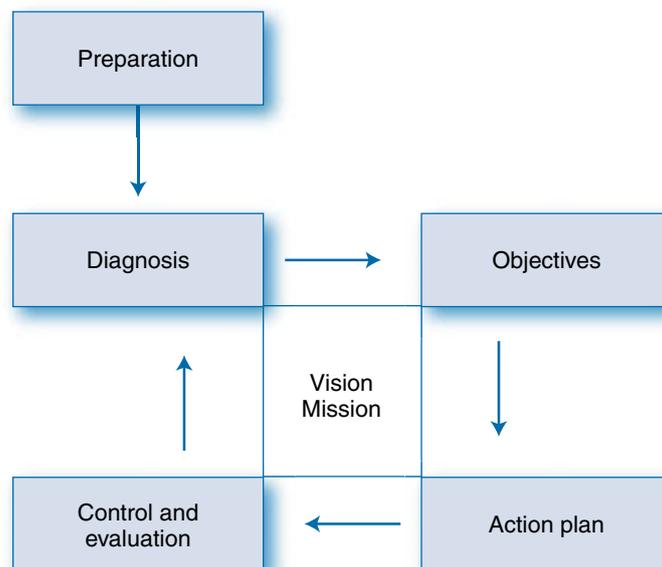


**D**iversification in sport practices and the growing marketing potential of sport have inevitably led to increased competition between traditional and novel sport organisations to attract and keep followers and sponsors. To answer this challenge, sport organisations today must use strategic management, much as commercial enterprises first did in the 1960s.

Strategic management can be defined as the implementation of a strategy, which is a plan for achieving long-term goals and objectives and allocating resources necessary for carrying out these goals. The need for strategic management within sport organisations first surfaced in Europe, but today it exists on every continent as a result of the globalisation of business and sport. Many NOCs, IFs and NFs as well as other Olympic Sport Organisations (OSOs) have already implemented such procedures.

Strategic management can be represented as a simple five-step process consisting of preparation, diagnosis, objectives, planning and evaluation. The process, outlined in figure 2.1, needs to focus on the OSO's vision and mission. In order to create a strategic plan, you and your Executive Board must answer a few basic questions:

- What is your situation?
- What are your objectives?
- How do you realise those objectives?
- Have you achieved your objectives?



**Figure 2.1** Strategic management cycle.

This process needs to be ongoing. You would not develop one plan and then expect it to guide the OSO for the rest of its time. Usually strategic plans are developed for a 4-year period. As this period comes to a close, the plan needs to be reviewed by the Board and OSO management and, if necessary, adapted for the next quadrennial.

The goal of this chapter is to present the principles and techniques that can be used in the strategic management of OSOs. The first section outlines how you can prepare for the planning process, followed by the second section, a discussion of the operating environments. The third section looks at the role of vision, mission and objectives in guiding the plan, and then the fourth section outlines how you can develop plans to meet these objectives. The fifth section considers the control and evaluation of the plan, and the chapter concludes with a presentation of the strategic plan of the Zimbabwe Olympic Committee.

## SECTION 2.1

### PREPARING FOR THE STRATEGIC PROCESS

The conditions for implementing your strategy and the success of that strategy will depend largely on the quality of your planning. Engaging in strategic management requires formulating a detailed political and administrative plan that addresses, at a minimum, the following four questions:

1. Why do you need a strategic plan?
2. How will you go about developing this plan?
3. How much time do you have to carry out the strategic planning process?
4. What budget do you have for the strategic planning process?

This section considers these four questions and then concludes with a description of the framework that the New Zealand Olympic Committee developed in order to prepare for the planning process.

#### Reasons for Implementing a Strategic Plan

Strategic plans can be motivated by internal factors such as vague objectives, poorly defined roles and responsibilities of participants, a lack of clear cohesion amongst activities and a need to clearly define priorities. The strategic plan should be a unifying tool for management and internal communication. It should encourage paid staff and volunteer involvement and a more effective collaboration between the two types of workers. It is also important to note that the strategic planning process is not just the domain of managers, rather it can be initiated and promoted by elected members, such as the Board. It may also be a request that comes from the membership.

Internal factors can be important, but external factors are often the main driver of the development of a plan, such as the need to demonstrate good governance and to communicate goals, values and key objectives to partners. A plan will also show partners that you are doing everything you can to fulfil these goals, values and objectives. In many cases, a strategic plan is required by funding agencies to show how you will use the resources they give you. Such plans are also a useful tool for dealing with the increasing cost of high-performance sport; a strategic plan will allow you to plan the efficient and effective use of your resources. This is particularly important if you operate in an environment of dwindling public funding for sport. Externally, the strategic plan is a communication tool that you can use to reinforce the organisation's image and the legitimacy of its activities to your public and private partners.

Clarifying the role of strategic management in an organisation is an essential step that highlights the importance that stakeholders should place on the plan's development and implementation. Organising a meeting with volunteers and paid professionals, for example, could help validate the role and advantages of the strategic approach. In addition, a meeting with the Executive Board will be necessary to discuss the strategic planning process. Inviting an expert to explain the benefits, principles and methods of strategic planning may be useful, as may the director of another Olympic organisation who could explain the strengths and weaknesses of that organisation's strategic plan.

The purpose of this stage of the planning process is to ensure that all stakeholders are aware of the need for a strategic plan and are committed to helping with its development if required. Once this is achieved, you can decide how you will go about developing the plan.

## Developing a Strategic Plan

You must decide on the steps and methods for gathering information. If you are not sure what is required, you could seek information on how to develop a strategic plan from other OSOs, your NOC, or a relevant government department. In addition, the Internet provides a wide range of information on the process of strategic planning.

You also need to determine who will be involved in this planning effort. The Executive Board must be part of the process, and it should also be part of the roles and responsibilities of any salaried professionals in your OSO. The strategic planning process should be coordinated and supervised by a senior Board member or a strategic committee that will act in concert with the Executive Board and any paid staff. The Executive Board and the General Assembly will be required to approve the strategic objectives.



Photo courtesy of the Comité Olímpico Mexicano.

You might seek advice from other OSOs as you embark on the strategic planning process.

It is also helpful to know whether you are able to use an outside consultant to help in your approach. This decision might be dictated by the desire to have input from someone with an objective view of your organisation's past and present performance. The consultant can act as a guide and facilitator during the process. For many smaller OSOs, this may seem an unnecessary luxury; however, an outside consultant does not necessarily need to be expensive. Students in business courses are often looking for organisations with which to carry out research work, and this may provide the opportunity for external assistance. In addition, you may be able to ask for assistance from an OSO that has a strategic plan.

The expertise of an external consultant could also be retained for preparatory work. However, you need to clearly define the role of any consultants you choose to employ. They will need to have a specific set of tasks, and you must also communicate their role to all involved with the organisation so that their role is understood. It is also important to employ a consultant who is aware of the special nature of sport organisations and the environment within which they operate. Consultants who try to apply ready-made solutions from the commercial world are rarely successful in OSOs. Table 2.1 shows how the planning process can be developed.

**Table 2.1 Responsibilities in the Strategic Planning Process**

Task	Person responsible	Time frame
Draft desired objectives and develop scope of strategic planning process (who, what, when, where, how).  Recruit external consultant if required.	Internal leader or committee responsible for strategic planning	Start of process
Approve process and budget.	Internal leader or committee	As soon as possible after the scoping of the process
Collect and analyse data (environmental scan, evaluation reports, stakeholder input).  Prepare strategic planning report and recommendations.	Internal leader or committee  External consultant if recruited	Once approval has been given; 3-6 months will be needed
Submit preliminary report.	Internal leader or committee  External consultant	3-6 months after the data collection process
Discuss the report with the Board, soliciting various contributions and amendments.	Executive Board	At Board meeting following submission of the draft report
Submit final report for approval by Board/General Assembly.	Internal leader or committee  External consultant	To be agreed upon with the producer of the report, but usually within 3 months

Adapted from the Canadian International Development Agency, 1997.

Establishing the method is important so that you know who will be involved and at what stage they will be involved. You then need to set a time frame for the process so that you know when stakeholders have to be available. In addition, performing a strategic diagnosis and defining a strategic plan are usually long processes. Therefore it is helpful to define how much time you have to develop or revise the strategy. This could include

- a quick exercise, such as a week, in which case it will only be possible to make revisions to an existing strategy;
- a relatively short process, such as 1 month, in which case diagnosis and strategy development will be compressed; or
- an in-depth analysis over 9 to 12 months.

To be realistic, you should plan for 3 to 6 months to analyse and develop a new strategy because most OSO strategies require a collaborative approach with other OSOs. This type of methodology requires frequent dialogue between the Executive Board and key directors, volunteers and managers. The strategy must involve collaboration amongst all participants in the organisation to ensure that all stakeholders are committed to the plan once it is developed.

Finally, it is useful to establish a budget for developing the strategic plan. This budget should include financial and administrative costs, such as the costs of data collection and human resources, including time dedicated by Board members and managers. If feasible, the budget may also include the cost of an outside consultant.

The support of the Executive Board and the General Assembly is essential, particularly when a long process is required or when an organisation has been through a serious crisis. If the time available for strategy development is short, such as 3 months, the Executive Committee may approve the procedure and then communicate the information and explanation to your management team and member organisations. By the end of this planning stage, you should have obtained political support, with the approval of your Executive Committee or General Assembly, for the following:

- Rationale for the strategic planning process
- Methodology for achieving the plan
- Budget, time frame and human resources dedicated to achieving the plan

This will allow you to begin the process of developing your OSO's strategic plan.

## KEY RECOMMENDATIONS

- ▶ Work with your Board to clarify why you need a strategic plan and how much work needs to be done to develop it.
- ▶ Identify a member (or members) of the Board who will lead the strategic planning process.
- ▶ Look for outside help from consultants, other OSOs or students if you need assistance.
- ▶ Ensure that all stakeholders are willing to be involved in the process.
- ▶ Develop clear procedures for involving the necessary people and collecting the information that you need.
- ▶ Do not try to rush the process. Use as much time as you have available to ensure that the process is thorough.

There are a number of ways that you can prepare for the strategic planning process. The following illustration outlines the preparations that the New Zealand Olympic Committee made in order to develop a new strategic direction for the organisation.

**Illustration 2.1*****Preparing for Strategic Planning:  
New Zealand Olympic Committee Inc.***

The New Zealand Olympic Committee Inc. (NZOC) adopted an innovative strategy when preparing for their strategic planning process. The organisation developed a value framework, called the Peak Performance Framework (PPF), to act as a guide for their subsequent planning. The organisation also was specific about what it wanted to achieve with the strategic planning process. The PPF was required in order to

- ensure that the NZOC remained a peak-performing organisation at the end of the planning process,
- spread peak-performing principles across the member federations involved in developing the strategic plan, and
- ensure that the NZOC achieved a clearly defined plan that unified the organisation and provided a clear direction for the future.

The organisation engaged a consulting company to assist with the development of the PPF. The consultant interviewed the NZOC Board and its staff in order to assess the organisation's strength and preparedness to embrace the concept of peak performance. A 2-day workshop was also held to define the beliefs and concepts that were to pervade the strategic planning process. This led to an articulation of the organisation's spirit, inspirational dream, greatest imaginable challenge and focus (table 2.2), which went on to shape the development of the strategic plan. The process also established a game plan for putting the new organisational purpose into play. The final activity was a single-day inspirational workshop for the NZOC members that developed both individual and collective commitment towards the purpose of the organisation.

This process resulted in a framework to build the organisation's capacity to move from high to peak performance. The approach was innovative and permitted the subsequent development of organisational plans that flowed from the strategic thinking that was developed through the methodology described previously. Key stakeholders were engaged in the process and prepared for the subsequent strategy development. This was the first step to building a strategy, which took more than 6 months; however, by clearly identifying the underpinning ethos of the organisation, the NZOC was in a good position to ensure that its plan accurately reflected the desired future position.

In many OSOs, this process is unlikely to be as lengthy or as comprehensive. However, it is important to spend some time getting ready for the strategic planning process to ensure that once you begin to plan, you have all the resources and stakeholder support you need.

**Table 2.2 Aspects of the Peak Performance Framework**

PPF Purpose Content	Reason	Explanation	Communication intent
<i>Spirit</i> : Dream, inspire, excel together	Who are we?	The spirit defines the organisation.	Spirit infuses our communication with intent. It provides the tone of our communication.
<i>Inspirational dream</i> : Building a peaceful and better world by inspiring people through sport and the Olympic ideal  The dream is made up of the following: <i>Heart</i> : Inspiration through Olympism <i>Beliefs</i> : Participating in sport as a fundamental right that benefits society Being influential advocates for sport at all levels Celebrating our heritage and achievements Providing opportunities and the environment for people to excel through sport Creating and sustaining opportunities for sport development nationally and internationally Providing an inspirational Games experience Maintaining our autonomy Olympism is our philosophy	Why?	The dream explains why the NZOC exists.  The heart is the emotional centre or core of the business.  Beliefs define what the NZOC stands for.	The dream positions the brand.  Beliefs provide key messages about what we stand for.
<i>Greatest imaginable challenge (GIC)</i> : To be the model NOC on the planet	What?	What the NZOC wants to achieve. It must be measurable, stretchy and achievable in 3-5 years.	For external communication the GIC is translated into an external perspective that is the overall impression we want to leave people with.
<i>Focus</i> : Live the Olympic experience	How?	Focus defines how the NZOC will achieve the GIC and live the dream.	Focus influences the emphasis of our communication.

## SECTION 2.2

### DIAGNOSIS OF THE OSO ENVIRONMENT

Diagnosis is the second step in an organisation's strategic management process and, as mentioned in chapter 1, helps determine where the OSO is in relation to its internal and external environment. It is important to fully understand the environment in which the strategy will take place so that you can take advantage of opportunities and avoid threats. This section considers ways of diagnosing your environment and begins with a detailed discussion of the concept of stakeholders. This is followed by a discussion of how you can organise the material obtained by the environmental audits outlined in chapter 1. The section concludes with a presentation of the environmental diagnosis of the Cyprus National Olympic Committee.

#### Identifying Stakeholders

It is important for all OSOs, no matter what their function and size, to identify the stakeholders of the organisation in order to analyse the external environment and to see in what ways the stakeholders can help or hinder your strategy. Understanding stakeholders' points of view and expectations and integrating their comments in your plan will improve your strategy. Similarly, by identifying stakeholders who might oppose your strategy, you can anticipate their reactions and better address them.

Stakeholders of OSOs are the internal or external individuals, groups or organisations that can directly or indirectly affect the organisation's present or future situation. These include the following:

- General Assembly members, who elect the Board members
- Board members
- Volunteers
- Beneficiaries of the organisation's services, such as athletes, parents and officials
- Staff
- Public authorities who subsidise sport and expect positive contributions to health, education and social integration
- Donors who provide funding to the organisation
- Sponsors
- Suppliers
- The media

Brainstorming with people who are familiar with your organisation is the best method for identifying stakeholders, although an individual who knows the organisation well can also complete an analysis.

You can focus on the stakeholders in your immediate environment, known as the microenvironment, or in an expanded environment, known as the macroenvironment (figure 2.2). The microenvironment includes members, clubs, leagues, institutional and financial partners, suppliers of goods and services, your current and potential public, and your direct and indirect competitors. The macroenvironment includes the broader demographic, sociological, economic, technological and legal factors that are outlined in chapter 1. Sport organisations inevitably undergo frequent situational (political, economic, social, international) and structural (demographic, cultural) societal changes on the national and international level, which is why regular audits of key stakeholders are necessary.

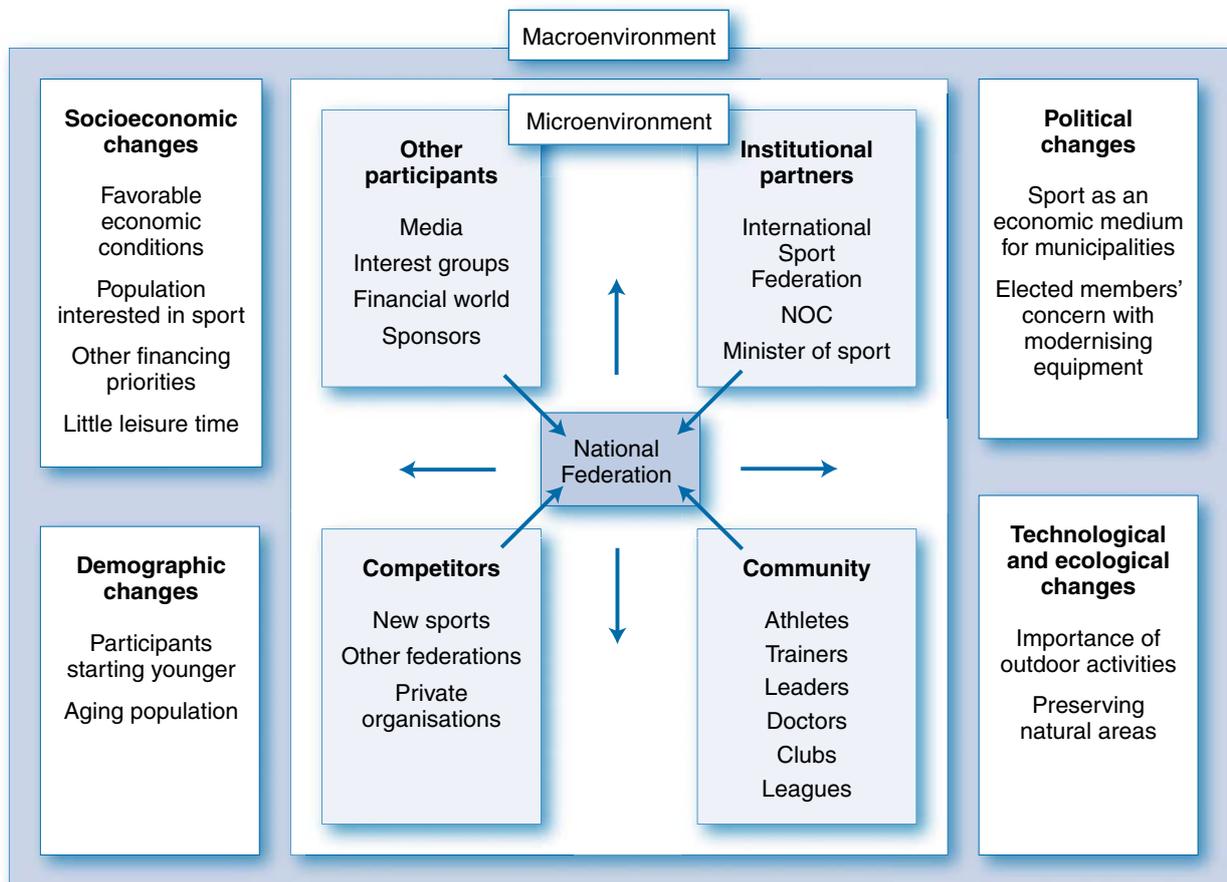


Figure 2.2 Stakeholders of an NF.

Once you have identified the stakeholders, you can categorise them according to their interest in and control of your strategy. The Stakeholder Interest–Control Matrix (table 2.3) allows you to classify stakeholders according to how much attention they should receive from the organisation. There are four priorities, corresponding to the four quadrants of the matrix:

- *Priority 1:* These are stakeholders you should always consider during the development of the strategy. You should carefully manage them and keep them informed during the implementation of the strategy.
- *Priority 2:* These are stakeholders you should keep satisfied during the development phase.
- *Priority 3:* These are stakeholders you should keep informed during the development and implementation of the strategy.
- *Priority 4:* These are stakeholders you should keep an eye on from a distance.

Priority 1 stakeholders are essential to your strategy. You must understand their own strategies and, if they are individual participants, their motives. This is because they have the power to prevent you from proceeding with your chosen strategy if they are not committed to it.

## Conducting an Internal and External Analysis

Chapter 1 outlined a structure for auditing the internal and external environments of an OSO. In addition to the structure proposed in chapter 1, you and your Board might ask yourselves the following questions:

- What is your history?
- What is your current mission? Is it well formulated and appropriate for your activities?
- Who are your members, beneficiaries, clients, suppliers and, more generally, your stakeholders?
- Who are your competitors? Who are your potential allies?

**Table 2.3 Stakeholder Interest–Control Matrix for an NF**

Factor	Little interest in your strategy	A lot of interest in your strategy
Little control over your strategy	General public Some suppliers <i>Priority 4: Keep an eye on them from a distance</i>	Sponsors OSO competitors <i>Priority 3: Keep them informed</i>
A lot of control over your strategy	NOC IF <i>Priority 2: Keep them satisfied</i>	Community <i>Priority 1: Manage them carefully</i>

Adapted from [www.mindtools.com/pages/article/newPPM\\_07.htm](http://www.mindtools.com/pages/article/newPPM_07.htm).

- What are the threats and opportunities in your organisation?
- What are your organisation's strengths and weaknesses?

The last two questions in this list are the most important. They lead to the presentation of an analytical technique known as SWOT, which stands for strengths, weaknesses, opportunities and threats. This technique involves identifying the strengths and weaknesses of the organisation, as well as outside threats and opportunities, and then charting them as outlined in figure 2.3.

<p style="text-align: center;"><b>Strengths</b></p> <ul style="list-style-type: none"> <li>Stakeholder support</li> <li>Good volunteer involvement</li> <li>Good public image</li> <li>Satisfied sponsors</li> <li>Paid staff who are very involved in the success of the organisation</li> <li>Good relationship with government</li> <li>Good premises</li> <li>Good promotional strategy</li> <li>Current lack of major competitors</li> <li>Excellent transport links</li> </ul>	<p style="text-align: center;"><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>No organisational chart</li> <li>Poorly developed job descriptions for volunteer and paid staff</li> <li>Low level of professional training</li> <li>Lack of room for expansion</li> <li>Blame culture prevalent amongst staff</li> <li>Lack of teamwork</li> <li>Hidden agendas of some directors</li> </ul>
<p style="text-align: center;"><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>Government capital investment programme</li> <li>Increasing awareness of the benefits of exercise</li> <li>Lifestyle changes for improving health</li> <li>Use of management techniques to improve management</li> <li>Branded image of service</li> <li>Lottery funding</li> </ul>	<p style="text-align: center;"><b>Threats</b></p> <ul style="list-style-type: none"> <li>Changes in government</li> <li>Decrease in school physical education</li> <li>Doping in sport</li> <li>Increasing culture of litigation</li> <li>Increasing competition</li> </ul>

**Figure 2.3** SWOT matrix for an NF.

Strengths are the things the organisation does well or the resources it controls. Strengths must be maintained and developed through good strategic management. Weaknesses are the things the organisation does poorly or the resources it lacks. Weaknesses can and should be corrected through better management. You need to analyse the strengths and weaknesses of your organisation in terms of its organisational, human, technological and financial resources.

Opportunities are positive factors that are outside the organisation's control but that the organisation can use to its advantage. Finally, threats are negative factors outside the control of the organisation. They must still be rebuffed or blocked through good strategic management. Opportunities and threats can be identified by analysis of the external environment, as discussed in chapter 1.

This technique is easy to use and can be applied to all OSOs, no matter what their function or size. A SWOT analysis is most effective when it is developed via discussions with a variety of stakeholders. This will help ensure that all vested interests are considered in its development and will widen the range of issues that can be entered in the matrix.

This type of matrix can serve as a framework for capturing ideas whilst they are being debated. It is sometimes difficult to distinguish internal factors from external ones, or even strengths from weaknesses or threats from opportunities. When in doubt, the factors you are unsure of can always be temporarily placed in any of the matrix borders.



© GETTY / MUNDAY Steve

Just as coaches and athletes assess strengths and weaknesses during a competition, conducting a SWOT analysis provides an assessment of your organisation.

Once you have refined the SWOT matrix through discussion and brainstorming, you can use the matrix to present the strategic diagnosis. With this diagnosis and the activities led by the organisation, you can determine the future key challenges to development.

## KEY RECOMMENDATIONS

- ▶ Identify all individuals, groups and organisations that have an impact on your organisation.
- ▶ Determine the priority each stakeholder has for your organisation.
- ▶ Together with the Board, carry out a thorough internal and external diagnosis by asking yourselves the questions presented in this chapter and in chapter 1.
- ▶ Use the SWOT framework to organise the information you obtain from discussions with stakeholders in order to inform your strategy.

The following illustration presents the process of diagnosis carried out by the Cyprus National Olympic Committee.

### Illustration 2.2

#### *Environmental Diagnosis for the Cyprus National Olympic Committee*

In 1996 the decision was made for the Cyprus National Olympic Committee (Cyprus NOC) to embark on an ambitious development plan with the aim of upgrading the organisation's role and services. Once the decision was taken, the Cyprus NOC decided that this should be a well-coordinated effort involving all partners. It is worth noting that when OSOs decide to develop a strategic plan, it is crucial to invite all stakeholders or partners to take part in the process. Otherwise there is the danger of resistance to change, which will become obvious during the implementation stage, when stakeholders are unwilling to cooperate in the implementation of different projects. Thus, a customer-oriented approach was implemented by the Cyprus NOC whereby all stakeholders were given the opportunity to be involved in the strategic development process.

The first step was strategic analysis. An internal and external analysis was required whereby the strengths and weaknesses of the Cyprus NOC and the opportunities and threats in the environment were identified. This exercise involved a two-step procedure. Initially, individual consultations were conducted with all stakeholders in both the microenvironment and the macroenvironment. In this first step, stakeholders were asked to submit their proposals for discussion in individual consultations, whereby the issue under consideration was upgrading the services offered by the Cyprus NOC to the stakeholders. This was a lengthy and demanding process that lasted almost 6 months but was crucial to the development of a strategic plan that was accepted by all partners. Upon completion of the first step, stakeholders were invited to participate in workshops. A major part of these workshops was devoted to brainstorming, leading to the development of the SWOT, as outlined in figure 2.4.

*(continued)*

Illustration 2.2 (continued)

Internal analysis	
Strengths	Weaknesses
<ol style="list-style-type: none"> <li>1. A charismatic and influential President supported by a team of competent officials and officers</li> <li>2. A small but vibrant organisation, transparent and credible</li> <li>3. Good utilisation of available resources</li> <li>4. Special expertise and knowledge on sport management, which offers a competitive advantage</li> </ol>	<ol style="list-style-type: none"> <li>1. Weak support provided to customers (NFs mainly)</li> <li>2. Facilities and offices both for the NOC and NFs are not adequate, thus creating many problems in the day-to-day operations and functioning of the sport system</li> <li>3. Limited use or exploitation of the marketability of the five rings</li> <li>4. Minor use of the valuable resource of volunteers</li> </ol>
External analysis	
Opportunities	Threats
<ol style="list-style-type: none"> <li>1. Utilise wisely the excellent relations with the government</li> <li>2. Capitalise on the excellent opportunities available in the business environment for sponsorship/partnership agreements</li> <li>3. Capitalise on the opportunities available because of the Olympic Games in Athens in 2004</li> <li>4. Capitalise on the opportunities available for developing bilateral agreements for sport development</li> </ol>	<ol style="list-style-type: none"> <li>1. The fact that some authorities or people in key positions do not like that the NOC is upgrading its role in the Cypriot sport system</li> <li>2. Resistance to change by people who enjoy living in the comfort zone</li> <li>3. The fact that many new emerging opportunities are available for partnerships and people without expertise or knowledge have been rushing to capitalise on the opportunities, acting in very unprofessional ways to the detriment of sport</li> <li>4. The lack of a sporting culture</li> </ol>

**Figure 2.4** Summary of the SWOT analysis of the Cyprus NOC.

The SWOT matrix allowed the Cyprus NOC to organise the findings of the audits and communicate areas that needed to be addressed by the strategic plan. From this information, the Cyprus NOC identified key areas that constituted the backbone of the strategic development process.



This diagnostic step will allow you to identify your OSO's organisational abilities, which should be linked to the requirements of your strategic objectives. Once you have completed this step, you will need to redefine the organisation's vision and mission and establish clear strategic objectives for your organisation.

## SECTION 2.3

### VISION, VALUES, MISSION AND STRATEGIC OBJECTIVES

Internal and external analysis makes it possible to determine the potential strategic actions that target one or several SWOT factors. Actions that address several factors are the most important. It is necessary to structure these actions by defining the vision, values, mission and strategic objectives that the organisation wishes to adopt. This section considers the role of these in the development of strategic objectives. It then goes on to discuss how the objectives are used to guide the development of plans. The section concludes with a discussion of the vision, values and mission of the Papua New Guinea Olympic Committee.



Banners displayed at the XX Olympic Winter Games, Torino 2006, clearly communicated the values of the Games.

## Vision and Values

The vision and values of an OSO will help its members and partners to share the organisation's dream for the future. Vision corresponds to what the organisation wants to be in the long term, whilst values are the underpinning beliefs that the organisation promotes.

For example, the United States Olympic Committee's (USOC) vision statement, adopted in June 1996, was as follows:

The United States Olympic Committee is dedicated to preparing America's athletes to represent the United States in the ongoing pursuit and achievement of excellence in the Olympic Games and in life. Our Olympians inspire Americans, particularly our youth, to embrace Olympic ideals and to pursue excellence in sport and in their lives.

To establish an OSO's vision, you must be very clear about the values you want to protect and promote. Values, such as those that underpin the Olympic Movement, are immaterial things but are the essence of the vision of an OSO. Values work as principles and a framework that will inspire the formalisation of objectives and the implementation of the strategy. They represent a collective belief that inspires individual behaviour. Values are often a reflection of society's underpinning concerns such as equality, importance of leisure time, new ways to do politics with more transparency and necessary accountability. Figure 2.5 presents the values of the Swiss Swimming Federation (SSF).

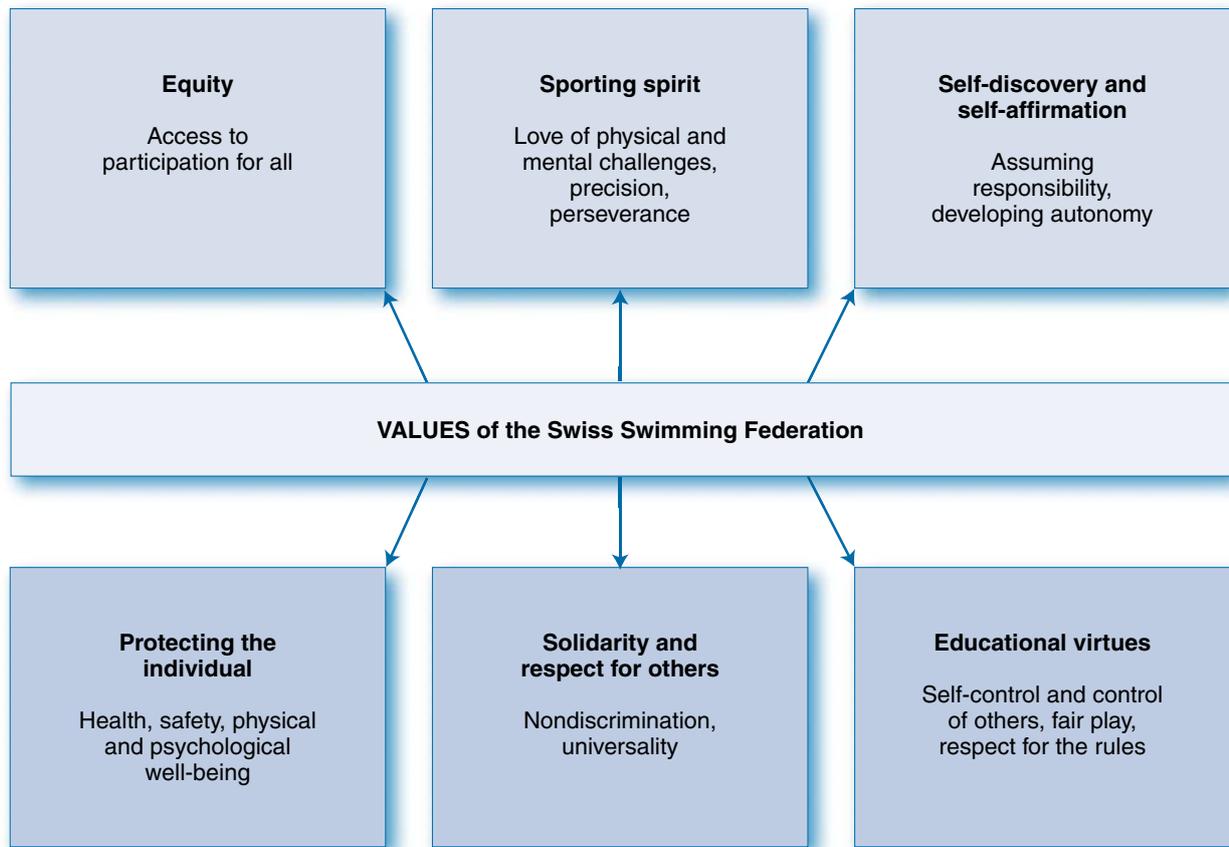
As suggested by the NZOC's Peak Performance Framework, outlined in illustration 2.1, the vision and values provide a framework for the rest of the strategic planning process. This is why it is important to be sure of the values that your organisation wants to promote. For example, the values of the SSF were highlighted and formalised to give the federation anchor points for implementing strategic activities.

## Mission

Mission corresponds to the reason the organisation exists, and the development of a mission statement should follow a discussion on shared vision and values. The mission determines the personality of your organisation and therefore must be in line with the organisation's values. In order to develop a good mission for the organisation, you must answer four questions:

- Why does the organisation exist?
- What are the goals the organisation strives to achieve?
- For whom does the organisation aim to function?
- How does the organisation fulfil its function?

If you already have a mission, from time to time it is useful to verify the current state of the mission by asking these questions:



**Figure 2.5** Values of the Swiss Swimming Federation.

- Is your mission still appropriate in current circumstances?
- Does the organisation exert the desired influence within its domain of activity?
- Should this mission be modified?

If your mission no longer accurately reflects the current reality of your organisation, it must be amended.

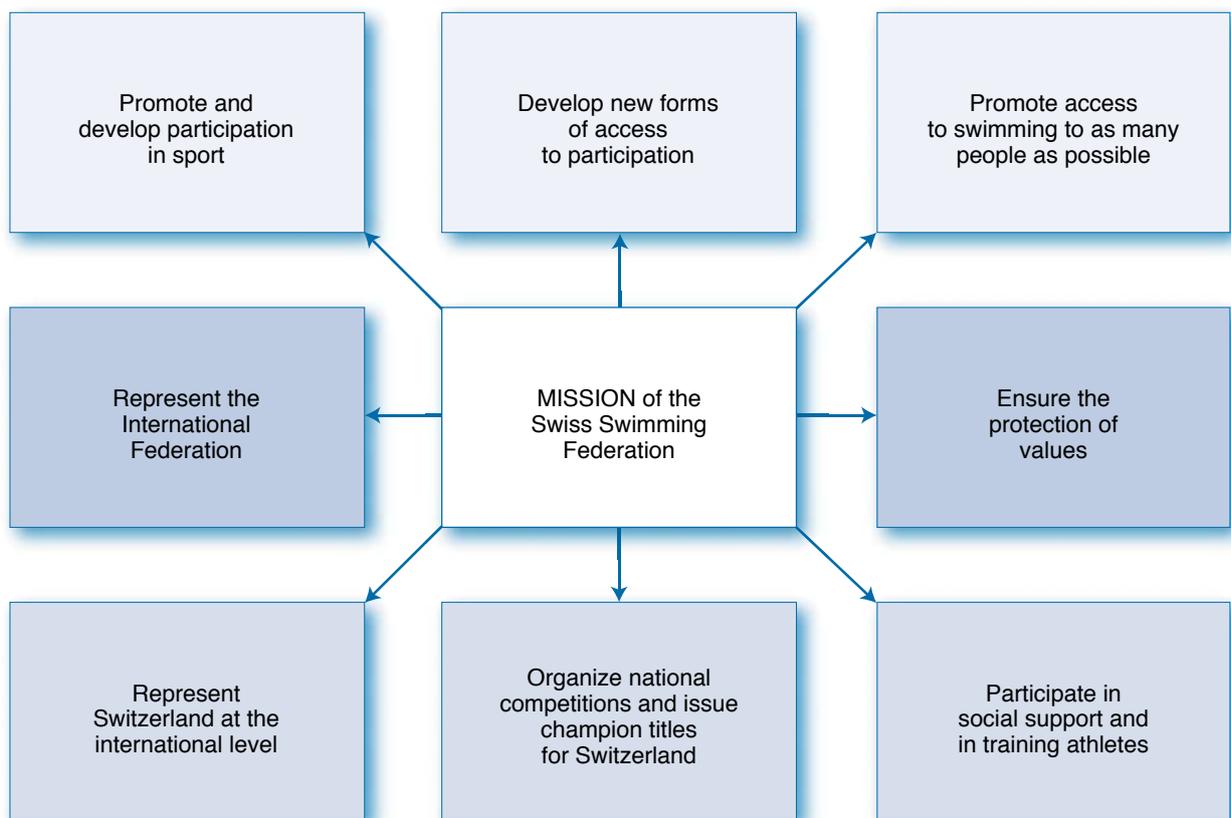
Many OSOs centre their mission on the idea of sport performance, medal winning and organising competitive events. However, you should also integrate a humanistic, social and environmental orientation into the mission in order to reflect the values of the Olympic Movement. This can give social meaning to an OSO's mission and allow it to connect with different areas of society in order to reinforce and validate that mission to its stakeholders. For example, an OSO's mission could include the following:

- Diffusing the organisation's values through volunteer work
- Participating in educating young people

- Developing training for responsible volunteers who share the OSO's vision
- Contributing to environmental protection and land-use planning
- Fighting inactivity through sport practices
- Reinforcing the home country's image in the world

The SSF revised its mission to give new meaning to its activity, especially through integration of leisure activities that had been previously overlooked. Its mission is presented in figure 2.6.

Two missions in particular are new and reflect social concerns: "Develop new forms of access to participation" and "Promote access to swimming to as many people as possible." Others, such as "Participate in social support and in training athletes," were included to give the SSF a broader and longer lasting influence.



**Figure 2.6** The mission of the Swiss Swimming Federation.

The closer you come to the top of the Olympic sport system, especially at the IF and IOC level, the more the social and educational values become central to the stated missions of the organisation. This type of social and educational contribution is not only explicitly stated in the mission of the Olympic Movement, it is its driving force. However, in order for the vision and values of the OSO to guide its activities, both need to be expressed in organisational objectives.

## Strategic Objectives

Strategic objectives are an OSO's articulated aims to address major changes, competitiveness, social issues and business advantages. Strategic objectives are focused both externally and internally and relate to significant stakeholders, markets, services, or technological opportunities and challenges. Broadly stated, they are what an organisation must achieve to remain or become competitive and ensure the organisation's long-term sustainability. Strategic objectives set an organisation's long-term directions and guide resource allocations and redistributions.

The strategic objectives of an organisation help categorise the mission and outline the organisation's values in more detail. Your choice of strategic objectives is often important politically. The objectives are usually determined through negotiation amongst key decision makers. This period of reflection and dialogue is essential to strategic planning because it provides the basis for the subsequent development of plans.

An OSO may have multiple and often contradictory objectives. For example, providing educational support for athletes whilst also encouraging them to reach peak possible performance can lead to certain contradictions in that an important competition may occur at the same time that examinations are scheduled. In this instance, a decision will have to be taken on whether the objective of providing life skills to the athlete through education is more or less important than the objective of improving elite performance. OSOs can make a profit by selling merchandise and charging competition entries, but they should use this profit to further the activities they organise for their members instead of sharing it amongst their owners or shareholders. OSOs must also take into account the fact that their standards of efficiency (achieving goals with the most efficient use of resources), effectiveness (establishing and monitoring effectiveness using measurable and attainable targets), performance and allocated resources are not, and cannot be, exactly the same as in the commercial sector.

In addition, the long-term goal of OSOs is an ideal with a political dimension. Usually there is no market for judging the success or failure of a strategy. Your organisation will depend on many volunteers, will be governed by elected officials and will need to be open to the scrutiny of public opinion. The motivations of elected officials who decide on the strategy to be followed may be different from those of salaried managers who are responsible for carrying out the strategy. It is therefore necessary to reconcile the multiple and sometimes contradictory external and internal objectives of the different stakeholders involved.

To help with this, you and the Board need to carry out the following four tasks and then use the matrix outlined in table 2.4 to define strategic objectives:

- Identify your strategic objectives.
- Analyse the impact that the objectives will have on your organisation.
- Evaluate the feasibility of each objective.
- Evaluate the risks your organisation could face as a result of each objective.

Once you have gauged the impact, feasibility and risk of each objective, you must weigh all of these factors and decide whether to pursue the objective. It is important to only choose objectives that help your OSO achieve its vision and mission, which also means that changes to the vision and mission require changes to the objectives. In addition, bear in mind that organisations work best with continuity, so at least some objectives should maintain continuity with the past.

**Table 2.4 Matrix for Determining Strategic Objectives of an NOC**

Strategic orientations	Strategic objectives	Impact	Feasibility	Risks	Decision	
					Yes	No
Provide promotion for Olympic NFs	Increase printed media promotion of the sports of the Olympic Games.	High	High	Conflict with non-Olympic sport federations	Yes	
	Increase visibility and promotion of sport by creating specific sport TV programmes.	High	Low	Cost and feasibility	No	

## KEY RECOMMENDATIONS

- ▶ State your OSO's underlying principles as a clear vision.
- ▶ Underpin this vision with value statements and use these to create a mission.
- ▶ Use the mission to develop objectives for the organisation.
- ▶ Evaluate vision, values and mission on a regular basis to ensure that they reflect what is important to the organisation.

The following illustration shows how the objectives of an OSO relate to its stated vision, mission and values. The Papua New Guinea Olympic Committee is a relatively small NOC; however, it has embraced the principles of good strategic planning.

### Illustration 2.3

#### *Vision, Values, Mission and Strategic Objectives of the Papua New Guinea Olympic Committee: Strategic Plan, 2006-09*

The following information shows how the Papua New Guinea Olympic Committee (PNGOC) has defined its vision, mission, values and strategic objectives. (The acronym PNGSFOC, which is used in some of the documents, refers to the new name of the NOC, Papua New Guinea Sports Federation and Olympic Committee, pending approval.)

#### Vision Statement

To build a framework of Sports Development that will bring regular and frequent success for our athletes at the South Pacific Games, Commonwealth Games and Olympic Games.

“Building for success in Sports”

#### Values

In carrying out its mission, PNGSFOC will act according to the following overriding values:

- Acknowledgement of the need and responsibility to develop Papua New Guinean athletes to pursue excellence in sport internationally
- Recognition of the importance of effective coaching, administration, sports medicine and officiating in sport
- Recognition of the need to cooperate with all agencies contributing to sports development in PNG and direct resources in a more objective manner
- Conducting our affairs in a businesslike approach
- Obligation to communicate effectively to all our Stakeholders, including our members, sponsors and the National Government
- Recognition of the principles of “Olympism” and the spirit of the Olympic Charter at all levels of sport
- Ensure that all people in PNG can participate in sport without any form of discrimination on grounds of race, religion, politics, gender or otherwise and in a safe, secure environment
- Participate in sport fairly and without the use of substances and procedures prohibited by the IOC or IFs
- Encourage development of sport and support the promotion of Physical Education, Health and Recreation in Papua New Guinea, in particular amongst persons with disability, women and veterans

Many of these values are reflected in the following mission statement.

*(continued)*

Illustration 2.3 (continued)

### Mission Statement

To provide the required resources for elite athletes and officials to participate in organized sporting competitions at national and international levels, including South Pacific Games, Commonwealth Games and Olympic Games.

### Key Result Areas With Strategic Objectives

The mission requires a number of key result areas that address the situation in sport in Papua New Guinea and the mandate of the PNGSFOC. These areas are associated with key objectives, including the following:

- *Management:* To improve and sustain an efficient management structure for the PNGSFOC
- *Financial Management:* Increase the amount of financial support to our membership
- *Elite Competition:* To improve the performance of PNG athletes and officials at elite level competition
- *Sport Development:* To assist members in developing more opportunities for all athletes and officials to be competitive at the elite level
- *Sponsorship, Fundraising and Marketing:* Improve the profile of the PNGSFOC to attract more revenue from sponsorship and fundraising



The example of the PNGOC illustrates how a mission guides the subsequent planning activities. One can observe that the mission statement is focused on sport results in international competitions, which permits the OSO to present clear objectives for key results. It is interesting to note the emphasis on *all* athletes and officials, which shows the PNGOC's commitment to working with athletes regardless of ability, gender or otherwise. This reflects the Sport for All and other social values the PNGOC promotes. This will help to ensure that they receive the importance that is attached to them in the value statements.

Portions of this illustration are reprinted with permission from PNGOC (2006) Strategic Plan 2006-2009.

## SECTION 2.4 ACTION PLANS

In order to achieve the objectives of the organisation, it is necessary to develop plans that allow this to happen. These plans may be simple or complex depending on the objectives that you wish to achieve and the resources that you have. The size of the plan is irrelevant; what is important is that it covers all of the OSO's objectives. This section discusses the development of action plans and begins by identifying why a plan should be developed and what it should contain. It then goes on to outline how plans might be developed and put into action. It finishes with a presentation of the plans that the Swaziland Olympic and Commonwealth Games Association has developed to meet its strategic objectives.

## Content of Action Plans

After defining the strategic objectives, you and your Board need to develop an operational action plan for the organisation. An action plan is a way to make sure your organisation's vision, values and mission are made concrete. It describes the way your OSO will use its resources to meet its objectives. The plan should be complete, clear and current. Additionally, the plan should include information and ideas you have already gathered whilst brainstorming about objectives and strategies. The plan addresses general goals you want to see accomplished, and then the action steps help you determine the specific actions you will take to help make your vision and mission a reality.

Each action plan should include the following information:

- *What* actions or changes will occur
- *How* the actions or changes will be carried out
- *Who* will carry out these changes
- *By when* they will take place, and for how long
- *What resources* (including money and staff) are needed to carry out these changes
- *Communication* (who should know what)

In order to determine this information, you have to choose actions and operations that are feasible. Table 2.5 shows how you could set out the required information if you were planning for an NF.

Each proposed activity must be in line with the OSO's strategic objectives. A clear identification of responsibilities and allocated resources is particularly important for the success of the strategic plan because it ensures that objectives can be met. A crucial point is to keep to deadlines so that plans are achieved within required time frames. Furthermore, because OSOs often achieve objectives by working in partnership with organisations (see the following section on working in partnership), it is important to meet deadlines. If you don't, you may be holding up the work of another OSO. Carrying out an action plan can be difficult if your OSO has few or no paid staff and relies primarily on volunteers, but there are two things that can help in this situation. First, everyone involved should try to follow the principles of good time management that will be discussed in the next chapter. Second, by keeping the objectives simple and in line with existing resources, planning will be more straightforward.

**Table 2.5 Planning for Action**

Action (what)	Tasks (how)	Responsibility (who)	Deadline (when)	Resources (with what)
Promote Sport for All	Help introduce new leisure activities into clubs and new services (hosting, youth education, events)	Regional sport governing body (person in charge of development)	As soon as possible, in line with club capacity to implement new activities	Human, logistical and financial resources Support from the regional sport governing body

## Developing Action Plans

The process of developing an action plan requires three steps. First, it is necessary to develop an overall, top-level action plan that depicts how each strategic goal will be reached. This must contain the information outlined in the previous section and will provide direction for the OSO as a whole. Next, you need to develop an action plan for each major function in the organisation, such as marketing development (see chapter 5), finance, and human resources (see chapter 3), and for each programme and service. These plans should depict how the overall action plan and the action plans of the major functions will be implemented. In each action plan, you should specify the relationship of the action plan to the organisation's overall action plan. Finally, each manager should develop an action plan that contributes to the overall strategic plan.

There is sometimes a danger, particularly in volunteer-run OSOs, that action plans may be developed that cannot be resourced. For example, an NF may decide to promote its sport by running a number of events; however, the clubs responsible for the implementation of these events may not have the required resources. This is why umbrella organisations such as NFs should involve local stakeholders in developing the action plan. This allows local organisations to define their level of involvement and time schedule before any plans are confirmed. The strategic plan of the NF will then take into account the local constraints.



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Just as sport teams conceive of action plans during competition, so OSOs might develop action plans that help them achieve their overall goals.

## Working in Partnership

Implementing action plans to achieve objectives is often something that an OSO cannot achieve on its own. This is why OSOs may need to work in partnership with other OSOs or with public and private partners. Alliance and partnership strategies can help you implement an action plan in a more effective and efficient manner, which might heighten the impact of your objectives within your limited resources.

Alliance strategies exist in different forms and on different levels, as shown in table 2.6. It is possible to differentiate between two types of strategic alliances: internal and external. Internal alliances are alliances with organisations in the OSO network. For example, if your OSO is an NF, you could create internal alliances with your regional leagues and clubs. External alliances are alliances with agencies, such as other OSOs belonging to the same family of sport activities (for example, outdoor sports); with OSOs that are at the service of other OSOs, such as an NOC; with other nonprofit organisations like nongovernmental bodies in health care; or with public partners and private partners, such as sponsors.

Partnerships and alliances are often very helpful in achieving your OSO's objectives and may be essential for small or volunteer-run OSOs. They allow you to make the most of your assets in order to overcome the resources you lack.

**Table 2.6** Examples of Possible Partnerships for an NF

Internal alliances	OSOs in the same family	Service OSOs	Other not-for-profit organisations	Public and private partners
The headquarters of an NF and its regional and departmental structures agree on objectives in order to establish the action plans.	Develop shared leisure practices by sharing equipment and training programmes.	Save money and resources by sharing a location, office equipment, secretarial staff, switchboard and reception with your NOC.	Work with universities to provide sport science support for athletes.	Establish sponsorship for team uniform.

### KEY RECOMMENDATIONS

- ▶ In conjunction with the Board, develop a number of action plans, beginning with the overall OSO plan and finishing with individual plans for those who have to deliver services.
- ▶ Involve all parties who will have responsibility for actions in the development process.
- ▶ Define work plans, procedures, responsibilities and resources for each plan.
- ▶ Establish alliances wherever possible to maximise resources.

The following illustration shows how the strategic priorities of the Swaziland Olympic and Commonwealth Games Association have been expressed as actions to be achieved.

#### Illustration 2.4

### *Swaziland Olympic and Commonwealth Games Association National Strategic Framework*

The Swaziland Olympic and Commonwealth Games Association (SOCGA) has a clear vision for sport in Swaziland. Sport is recognised and valued by the government and citizens as a tool for development and encompasses

- compulsory school sport,
- physical education, and
- community Sport for All.

This vision will be supported by qualified human resources and accessible facilities.

From this vision a number of strategic priorities were identified, and table 2.7 outlines these and the general actions associated with them. The general actions will allow the strategic objectives to be met; however, they are not detailed enough to guide the day-to-day activities of those responsible for delivering the action plans. In recognition of this, each key action required for the actions to become operational has been specified. Table 2.8 shows how one key action has been expressed in order to direct the activities of those who will deliver the associated actions.

This illustration shows how action plans can be developed at a number of levels. The vision led to strategic objectives, which had strategic actions associated with them. However, to make the plan operational, the strategic actions were further developed in order to delineate how they would be implemented in practice and to state clearly what has to be achieved, by whom, by when and with what resources. There is also a link back to the strategic activities so it is clear how each operation will allow the strategic objectives and thus the vision to be met. This process reflects good practice in developing action plans.

**Table 2.7 Strategic Priorities and Key Actions of the SOCGA Plan for Sport**

Strategic priorities	Key actions
Promoting the value of sport and physical activity	<p>Build the case for sport that will demonstrate the importance and values of sport in human development for presentations to all stakeholders.</p> <p>Design credible criteria for the recognition of achievers and use them to promote the case for sport.</p> <p>Increase public awareness through the media.</p>

Strategic priorities	Key actions
Sport for All	<p>Coordinate Sport for All programmes with various sport bodies and form partnerships with regional and international organisations for capacity building and promotion of Sport for All.</p> <p>Establish gender equity commission.</p> <p>Establish suitable programmes and structures for people with a disability.</p> <p>Integrate disadvantaged groups to existing sport structures.</p> <p>Establish links with school programmes inclusive of parents and community.</p>
Capacity building	<p>Create a sport education curriculum framework and accreditation system.</p> <p>Conduct a feasibility study for an academy of high performance.</p> <p>Establish training of sport leaders and administrators in corporate governance.</p>
Infrastructure	<p>Survey the status of ownership and accessibility of existing facilities.</p> <p>Encourage creation of sporting clubs and fundraising initiatives at community level for improvement of already existing structures.</p> <p>Develop a system for maximum collective utilisation of available nongovernmental facilities by sport organisation.</p>
Coordinated sport system	<p>Enact legislation.</p> <p>Coordinate meaningful partnership with stakeholders.</p> <p>Implement effectively the strategic plan and existing national sport policy.</p> <p>Build outreach capacity of ministry of home affairs and SNSC (Swaziland National Sports Council).</p>

*(continued)*

Illustration 2.4 (continued)

**Table 2.8 Operational Plan for the Goal to Provide Opportunities for Sport for All in Communities and Schools**

Activity (what)	Tasks (how)	Responsibility (who)	Timeline (when)	Resources (with what)
Coordinate implementation of Sport for All programmes.	Hold a meeting between SNSC and SOCGA persons.	SNSC, SOCGA	By end of October	Human resources
	Share programmes' content and redesign as necessary.	SNSC, SOCGA	By November	Human resources
	Set implementation plan.	SNSC, SOCGA	Beginning of January	Money for equipment, travel
	Implement the programmes.			

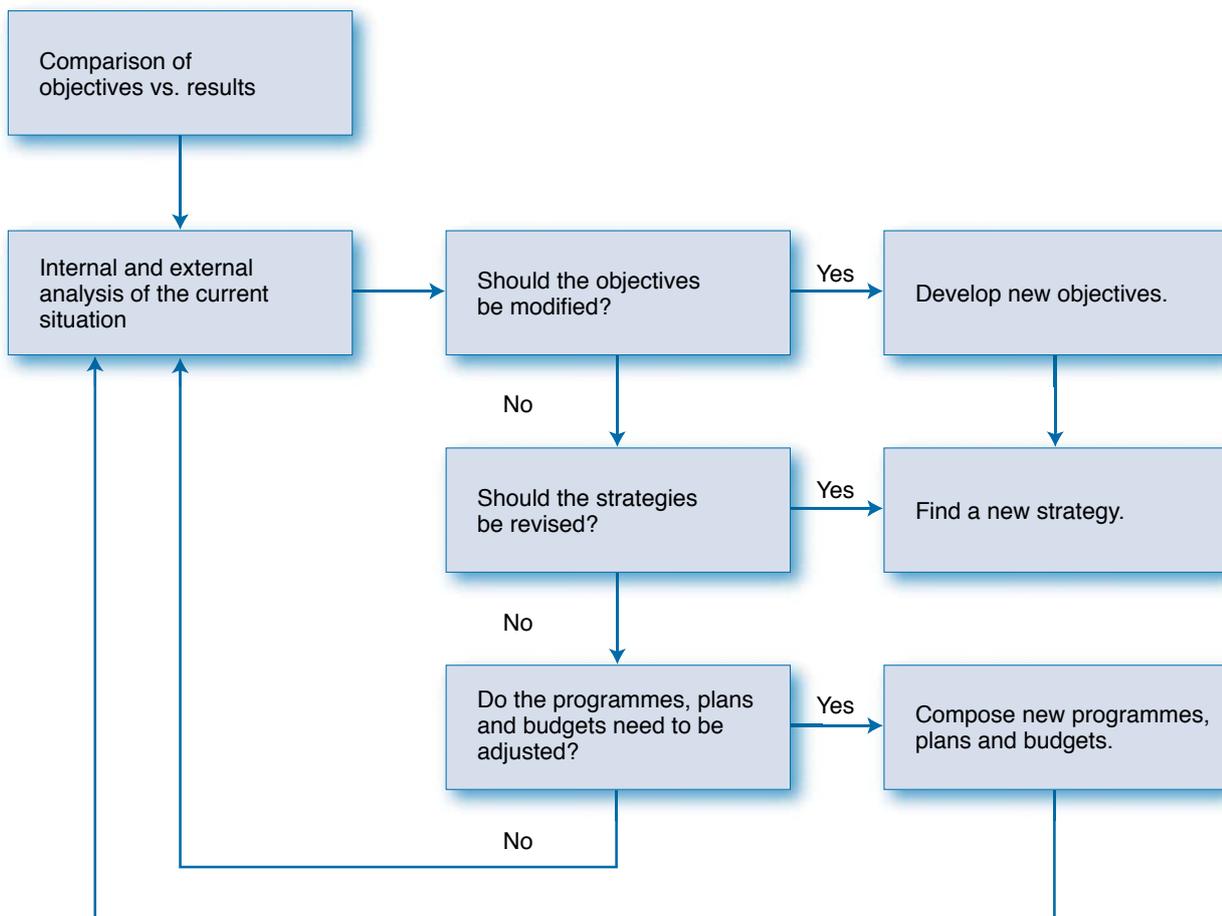
## SECTION 2.5 CONTROL AND EVALUATION

Control and evaluation are central to the management of every organisation and is a key responsibility of the Board of any OSO. Strategic evaluation is the final step in the strategic management process and involves comparing objectives with the actual results, which should be done by the Executive Board. As figure 2.7 shows, the evaluation and control process is not closed but continuous, and it takes place over regular control periods, scheduled as needed.

This section considers the role of evaluation in controlling and assessing the strategic plan. It discusses how plans can be evaluated and how these evaluation measures should be used. It also highlights why evaluation may be difficult in some OSOs. The section concludes with a presentation of the evaluation criteria used by the French Federation of Canoeing and Kayaking.

### How to Evaluate

In addition to the regular annual reports, accounting balance sheets, and profit and loss statements presented to the General Assembly (see chapter 4), the Executive Board must report the results of the OSO's activities to its members, as well as to its public and private partners. The role of the Executive Board in evaluation is paramount, and Board members should be involved in systematic evaluation of the strategic plan on a regular basis. This helps with the governance of the OSO (chapter 1) and makes the OSO accountable and transparent.



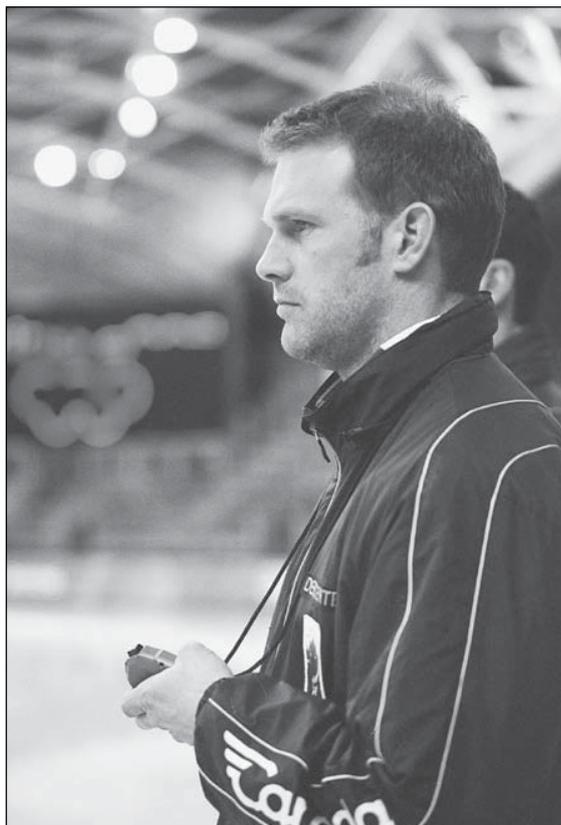
**Figure 2.7** Strategic control.

In order to evaluate performance, it needs to be measured, and all possible actions should be evaluated in order to control the strategic process. This control is best achieved through measurable indicators and benchmarks that have been set with the objectives attached to the mission. The indicators will help assess the resources used in relation to the desired goals. The performance indicators should give a balanced picture of the organisation's performance so that the Board can accurately assess performance.

The strategic plan needs evaluation measures, known as performance indicators, to serve as a global evaluation framework. Evaluation criteria need to be established for each action in the plan in order to control and evaluate that action. These evaluation indicators should correspond to the SPORTS acronym (specific, pertinent, objective, representative, transparent and simple), and they should be quantitatively and qualitatively measurable. For example, if you want to measure the success of your Sport for All programmes, you need an indicator such as "a 1% increase in participation amongst school-aged children by October" in order to evaluate whether the plan has been successful. In addition, milestones, which are performance indicators analysed at regular intervals to see what has already been achieved in the strategic plan, should be established in order to revise strategies and adjust programmes and budgets accordingly.

## Using Performance Indicators

Several factors need to be considered when using performance indicators (PIs) in order to ensure that they are valuable for evaluation. First, the data on which PIs are based must be trustworthy, particularly if the data is being used for external comparison. For example, if you are measuring financial performance, your financial records must be accurate and meet standard accounting conventions. At a minimum you should report financial performance in a consistent and standardised way. The data used to form PIs must be collected from the same sources and in the same manner. This is necessary to ensure that the performance that is being reported is accurate and allows comparisons. For example, if you are reporting on the success of four events encouraging children to join your sport, you need to decide whether the numbers attending the event or the numbers joining clubs is the measure of success.



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We can measure the success of strategic plans by using performance indicators, much like we time participants in sport events.

PIs also need to measure what they are considered to measure; otherwise they may lead to mistakes in management decision making. For example, counting the number of members is not always an accurate reflection of participants in the sport. Membership numbers do not include nonmembers who play the sport and often include people who are no longer active.

Perhaps of greatest importance, PIs should only be used as a guide for the management of an OSO because they do not provide an explanation for performance. For example, a PI will show that your athletes won three silver medals at the Olympic Games, but it will not explain why they didn't win gold. PIs will indicate areas of strengths and weaknesses, but they will not say why these areas are strengths and weaknesses. You and the Board need to provide an explanation for the performance.

Performance indicators on their own are meaningless. Performance needs to be evaluated in comparison with objectives. For example, an OSO may be successful in obtaining sponsorship, but it may have done this instead of promoting participation in sport. In this case, the OSO has been effective financially, but it has been ineffective from the point of providing Sport for All. Actual evaluation of performance has to be done in the context of what your OSO is trying to achieve. In this case, if the organisation wanted increased revenue, then its performance was effective.

## Barriers to Evaluation

Some OSOs neglect evaluation and strategic control, and there are several reasons for this. Evaluation and control take time, and as a result of having to balance a lot of tasks, Board members may prefer to look to the future instead of evaluating the present. Indeed, as a result of the work many volunteers have to complete, there may simply not be time for thorough evaluation if it is not prioritised. There may also be deficiencies in information systems, and Board members may not always have the information needed to carry out the evaluation and control process. Finally, evaluation, and in particular control of the OSO's activities, are not very fulfilling tasks and may also lead to difficulties for elected members as they may have to make reductions in operations that they, or their electors, value.

However, a lack of strategic control deprives the organisation of lessons learned from experience, and some type of evaluation using basic PIs should be attempted. If you do not feel that you or anyone associated with your OSO has the skills to develop appropriate PIs, it may be helpful to approach other OSOs for help or to approach a local university for student help. The Internet is also a valuable source of information on how to develop PIs.

In addition to assessing objectives and actions, the evaluation of an OSO can be an opportunity to quantify the organisation's contribution to society. Indeed, the clear mission of OSOs is to have an impact on society by sharing educational values related to sport, such as fighting against social exclusion and inactivity or improving the image of a country through events, competitions, medals and champions. Areas of evaluation could include the following:

- Financial value of voluntary contributions. This could be evaluated by trying to inventory the number of volunteers and the number of hours dedicated to developing sport.
- Creation of direct jobs within the OSO and indirect jobs in tourism, the hospitality business or organising public events.
- Contributions to the environment and health. This could be assessed by the number of actions that favour the protection of nature, or by highlighting sport's contributions to the health of individuals.
- Inclusion of former high-level athletes and young directors into the professional and social aspects of the organisation.

It is clear that not all the effects of sport on society can be evaluated objectively. It is also difficult to link effects to the actions of a single organisation. However, it is possible to evaluate certain contributions through specific reviews, and OSOs should attempt this in order to reinforce their Olympic values.

The strategic management process that follows the phases presented in this chapter has several benefits. Strategic management gives elected members better control and a clearer vision of the OSO. It facilitates the use of resources by setting out clear plans for their use. It also replaces a culture of resources with a culture of results and performance. This means that elected members, volunteers and salaried managers must be responsible for the effectiveness of their actions.

However, strategic management practices in OSOs often clash with two problems that can affect the implementation of the management process. The first is a lack of clarity in the organisation's goals. The second involves barriers that sometimes arise due to the difficulty of getting a group of people with different statuses and interests to work together. These barriers can also arise as a result of differences in the level of development and professionalism within an OSO's network. This is why you must focus on creating conditions that will allow the effective implementation of the strategic planning process. Two factors can help achieve these conditions. First, the mechanisms of governance and strategic management must be clear so that everyone involved understands who is responsible for what in the planning process. Secondly, you and your Board must promote the strategic plan internally and externally. This will allow you to outline what you want to achieve with the resources you have.

## KEY RECOMMENDATIONS

- ▶ Use the Board to develop indicators that directly measure the achievement of your objectives.
- ▶ Make sure that these indicators cover all key areas of activity.
- ▶ Ensure that you do not have too many indicators and that the indicators you use are relevant.
- ▶ Use the indicators to explain performance, and communicate this explanation to key stakeholders.

The following illustration shows how the Fédération Française de Canoë-Kayak developed evaluation criteria in order to measure the success of its strategic actions.

### Illustration 2.5

#### *Evaluation Criteria: Fédération Française de Canoë-Kayak*

The development plan of the Fédération Française de Canoë-Kayak (French Federation of Canoeing and Kayaking, FFCK) for the 1998-2002 period was adopted on 14 March 1998 by the General Assembly. This national document was developed with the input of all federation participants and provided an opportunity to reaffirm the OSO's values. The structure adopted for the plan was innovative. The category called "Think it" corresponds to values and mission, and "Say it" corresponds to objectives. "Do it" corresponds to action plans and evaluation measures. The following material shows how the FFCK has linked performance indicators to actions that lead to its strategic objectives.

#### Think It

Clubs are at the heart of the FFCK development project. The federation would like to provide clubs with clear, concrete support to allow them to multiply and sustain themselves on a quantitative level, and on a qualitative level, to allow them to organise themselves and develop an appropriate practice that takes into account all disciplines and motivations.

#### Say It

This part of the plan sets out the organisation's objectives.

##### **Qualitative Objectives**

- Promote the formalisation of canoeing and kayaking structures.
- Encourage use.
- Reinforce the information and attitudes that promote safe sport practices.
- Advise clubs in maintaining sport facilities.
- Train directors and officers.

##### **Quantitative Objectives**

- Create new clubs.
- Welcome new clubs and help clubs having difficulties.
- Promote membership to all.

#### Do It

This part of the plan states what the organisation will do and how it will be evaluated. It is presented in table 2.9.

*(continued)*

Illustration 2.5 (continued)

**Table 2.9** Actions and Evaluation Criteria of the FFCK's Development Plan

Actions	Evaluation criteria
Publish and make the logbook known.	
Accompany and better certify the formalisation procedure.	<b>Total number of clubs formalised</b>
Find additional sources of funding.	
Centralise requests and propositions.	
Provide administrative and legal advice.	
Contribute to the dynamic nature of the professional field.	<b>Number of new jobs created</b>
Participate in safety campaigns.	<b>Number and type of canoeing or kayaking accidents (accident analysis)</b>
Publish and distribute appropriate documents.	
Systematise the use of the federation signalling procedures.	
Publish and distribute documents that support and advise clubs.	
Encourage structural improvement (challenge club).	<b>Number of clubs submitting a challenge club file</b>
Develop and implement training programmes adapted to new needs: jobs for young people, employers, decision makers.	<b>Number of noncoach training programmes proposed</b>
Develop training programmes dealing with water access, river upkeep and understanding of the environment.	<b>Number of members trained</b>
Inventory potentially favourable sites.	<b>Number of sites inventoried</b>
Identify future directors.	
Help provide equipment.	<b>Number of new clubs created every year</b>
Promote cooperation and sponsorship between clubs.	
Propose forms of membership adapted for the clubs and members.	<b>Increase in number of members</b>

The FFCK has established qualitative measures for the actions that will lead to an increase in new clubs and better service to existing clubs. Note how clear the performance indicators (PIs) are and that there are a limited number. The information that leads to the PIs is straightforward and easy to obtain. These PIs will present a clear evaluation of performance that can then be explained by those responsible for the plan.

It should be pointed out that this 4-year plan was developed over two Olympiads—1998 to 2002—in order to avoid politicisation of the results and to ensure better continuity of action. The strategic plan that followed the 1998-2002 plan was established in the 2002-12 decade and was titled All for Action. It adopts a more global development approach that aims at getting decentralised bodies, such as regional leagues and departmental committees and clubs, more involved.

The key steps in achieving a strategic plan have been established and are presented in table 2.10. It is part of good governance to communicate the strategic plan to your public and private partners and the media to show the strategic intent of your OSO. However, this communication should be managed with caution. If you are unable to perform the expected objectives and actions due to factors outside your control, your organisation may face censure.

**Table 2.10** Steps of Strategic Planning

<b>Step 1</b> Prepare the strategy.	<b>Step 2</b> Conduct an internal and external diagnosis.	<b>Step 3</b> Determine the strategic objectives.	<b>Step 4</b> Develop the action plan.	<b>Step 5</b> Schedule the evaluation.
<p><b>Objectives</b> Explain the reasons for engaging in a strategic planning process.</p> <p>Present the chosen methodology and the data to gather.</p> <p>Define the period of time available, allotted budget, and roles and responsibilities.</p>	<p><b>Objectives</b> Understand your internal and external environment.</p> <p>Define your strategic capacity.</p>	<p><b>Objectives</b> Develop strategic objectives in connection with your mission and values.</p>	<p><b>Objectives</b> Identify the actions to be implemented to realise each strategic objective.</p>	<p><b>Objectives</b> Develop performance indicators.</p> <p>Decide how to report your actions to members and partners.</p>

(continued)

Table 2.10 (continued)

<b>Step 1</b> Prepare the strategy.	<b>Step 2</b> Conduct an internal and external diagnosis.	<b>Step 3</b> Determine the strategic objectives.	<b>Step 4</b> Develop the action plan.	<b>Step 5</b> Schedule the evaluation.
<p><b>Tools</b></p> <p>Identify a member of the Board who will be responsible for the process.</p> <p>Create a strategic committee.</p> <p>Define a budget.</p> <p>Gain internal political approval of your method (Executive Committee).</p>	<p><b>Tools</b></p> <p>Analyse key stakeholders who should be kept satisfied.</p> <p>Perform SWOT analysis.</p>	<p><b>Tools</b></p> <p>Formalise the strategic objectives by restating, and revising if necessary, your mission and values.</p>	<p><b>Tools</b></p> <p>Create an operational action plan linked to the strategic objectives.</p> <p>Define work plans and procedures, responsibilities, and resources for implementing them.</p>	<p><b>Tools</b></p> <p>Report on the strategic performance indicators.</p> <p>Prepare a community report.</p>

The following case study applies many of the points covered in this chapter to the planning process of the Zimbabwe Olympic Committee. The purpose of this case study is to demonstrate how the material in this chapter is applicable to OSOs. Although your organisation may not be the same type of OSO, the case study will highlight how the concepts can be put into practice.

## CASE STUDY 2

### Developing the Strategic Plan of the Zimbabwe Olympic Committee

Until 2002, the work of the Zimbabwe Olympic Committee (ZOC) was accomplished exclusively through volunteer efforts. At that time an office was established and an Operations Manager, Administrative Assistant and Office Orderly were hired. In July 2000, at the urging of several Directors who had participated in strategic planning exercises and had seen the value that such planning could bring to an organisation, the ZOC Board of Directors directed that a strategic plan be developed. However, the process was not initiated until 2002, following the election of a new Secretary General who championed the process.

#### ► Preparing for the Strategic Process

In March 2002 the Secretary General sought the input of a consultant to develop a planning process. Funding from Olympic Solidarity was sought to pay for the involvement of the consultant, and ZOC funds were budgeted to cover the costs associated with the workshop, such as facilities; participant transport, accommodation and meals; and communication and documentation.

A Steering Committee composed of the Secretary General, Marketing Chair and Operations Manager, all of whom were experienced in strategic planning, was formed. Guided by the consultant, this committee undertook the following:

- Identify key stakeholders to be involved in the process.
- Develop a status report, environmental scan and stakeholder survey.
- Design and coordinate the logistics for a 2.5-day planning workshop in a retreat setting.

The Steering Committee was somewhat ambitious in establishing the timeline and did not realistically assess the impact of final planning for and participation in the Commonwealth Games. Table 2.11 outlines the original and actual timelines for the process. Although the amended timelines did enable all the steps in the process to be completed and an excellent plan to be developed, the resulting workload for the Steering Committee and consultant was unrealistic and should not be replicated without allocating considerably more time between receipt of survey results and the actual staging of the workshop.

**Table 2.11 Planning Process in the ZOC**

Planned	Activity	Achieved
Jan.	Board approved June workshop	April
March	Olympic Solidarity funds approved Consultant hired	March
June 30	Draft status report, environmental scan and stakeholder survey	Aug. 25
July 30	Finalised	Aug. 26
Aug. 9	Surveys circulated	Aug. 27
Aug. 30	Surveys returned	Sept. 12-26
Sept. 20	Workshop design and tools completed	Sept. 25-28
Sept. 25	Group facilitators training Board planning orientation dinner	Sept. 25
June 27-29	Workshop	Sept. 27-29

### ► Diagnosis of the OSO Environment

The diagnosis process followed the principles and techniques promoted in this chapter.

#### *Identifying Stakeholders*

The Steering Committee identified the ZOC's key stakeholders as the following:

- National Federations (also known as National Sport Organisations or National Sport Associations in Zimbabwe)
- Athletes

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**CASE STUDY 2** *(continued)*

- Sport and Recreation Commission
- Government
- Special groups (e.g., people with disabilities, women)
- Educational institutions
- Sponsors
- Media

A 14-page stakeholder survey was circulated to more than 200 people in the identified stakeholder groups. The purpose of the survey was threefold. Its first purpose was to provide stakeholders with a common understanding of the current status of the ZOC, the environment in which it worked and the fundamental elements of strategic planning. The second purpose was to solicit the opinions and ideas of respondents with respect to the current challenges and future direction of the ZOC. The third and most important purpose was to build ownership for the strategic planning process and the resulting strategic direction. The Steering Committee realised that if the strategic planning process was to be successful, it must mobilise all stakeholders and partners behind the shared vision that resulted from the planning process and garner their cooperation and support in implementing the plans.

Survey recipients were asked to set aside 1.5 hours to review the status report and environmental scan and complete the survey, which could be returned by e-mail, fax or regular post. Many recipients indicated that they spent 3 hours or more and wished that they had had more time to devote to it. The survey asked recipients to complete a SWOT analysis and a vision for the ZOC for 2008, to identify the values that should guide the ZOC and to identify the roles it should undertake in the Zimbabwean sport system. Input was also sought on a number of strategic challenges facing the ZOC. Input from the stakeholder survey formed the basis for the planning workshop.

### ***Conducting an Internal and External Analysis***

A status report prepared by the Secretary General provided information on the internal environment. It outlined the history of the ZOC, including international representation and participation and results at Olympic, Commonwealth and All Africa Games. It also provided an overview of the ZOC's current governance structure, programmes, partnerships, communication with stakeholders and finances.

The environmental scan drafted by the Marketing Chair addressed both the macroenvironment and microenvironment. The macroenvironment explored political, economic and social trends both globally and within Zimbabwe and the implications of the trends for the ZOC. Social issues and trends with respect to equality, health and the physical environment were explored. The microenvironment explored sport trends related to national sport organisations; high performance; the sport system; lack of resources, facilities and equipment; societal expectations; schools and tertiary institutions; the IOC; and the Commonwealth Games Federation (CGF).

SWOT feedback from surveys was refined during the workshop as part of an icebreaker exercise during the opening session of the planning exercise. Identified items were then prioritised as high (H), medium (M) or low (L) based on the amount of human and financial resources the ZOC should expend on each (figure 2.8). The financial area is identified with an asterisk because it was high in both the weakness and opportunity areas.

<b>Build on strengths</b>		<b>Improve on weaknesses</b>	
Training programmes (coaches, sport admin.)	(H)	Poor preparation of teams for Games	(H)
Committed, dedicated leadership	(H)	Lack of strategic and business plans	(H)
International representation and influence	(M)	Lack of funds	(H*)
Competent, full-time staff	(L)	Poor communication with NSOs and stakeholders	(M)
Responsiveness to requests and queries over past year	(L)	ZOC being run by a small clique; Board sidelined	(L)
		Emphasis on medals instead of Olympism	(L)
		Technology underutilised (no database, website)	(L)
		Ineffective work by and monitoring of Commissions	(L)
		Underdeveloped corporate image	(L)
		Inconsistent decisions	(L)
<b>Capitalise on opportunities</b>		<b>Eliminate or neutralise barriers and threats</b>	
Promote the values of sport in combating crime, HIV/AIDS, poverty and unemployment	(H)	Limited capacity of NSOs (resources, expertise); inability of NSOs to take advantage of the opportunities	(H)
Increase knowledge, skill, experience and number of coaches and administrators	(H)	Economic and political situation; FOREX, international opinion	(H)
Access to finance	(H*)	Government policy legislation (equipment, visas)	(M)
Access international accredited programmes, scholarships, exchanges and internships	(M)	Decrease in health of the population	(L)
Develop the abundance of athletic talent	(L)	Brain/talent drain (athletes, coaches and administrators)	(L)

**Figure 2.8** The SWOT analysis refined during the ZOC workshop.

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## CASE STUDY 2 (continued)

**► Vision, Values, Mission and Strategic Objectives**

In September 2002, 49 ZOC Directors, stakeholders and staff came together for a 2.5-day planning session that will long be remembered as a milestone in the evolution of the ZOC. The retreat setting reduced distractions and created an environment that facilitated sharing, setting aside of differences, building consensus and focusing on the workshop's desired outcomes:

- Strategic framework for the ZOC
- Increased understanding of the ZOC and its stakeholders (both ways)
- Ownership of the ZOC strategic plan by members and stakeholders

The primary purpose of the planning workshop was to develop the vision, mission, values and objectives (strategic priorities and goals) for the ZOC. Within the ZOC these elements are referred to as the strategic framework. The ZOC's strategic framework also includes a unique element, a section on roles.

The roles element was included in the strategic framework to add clarity to the scope of the ZOC's responsibilities. The stakeholder survey revealed that the sport community generally expected the ZOC "to be all things to all people" within Zimbabwean sport. The ZOC had neither the desire nor the resources to extend its mission beyond that of an NOC and Commonwealth Games Association (CGA). It was hoped that by including a clear statement of roles within the strategic framework that the role of the ZOC within the Zimbabwean sport system would be better understood and expectations more effectively managed.

One of the approaches to building ownership for the ZOC plan was to involve current and emerging leaders from the ZOC and its stakeholders as presenters and facilitators during the workshop. The Director General of the Sport and Recreation Commission and the consultant acted as lead facilitators. Five other participants were selected to lead small-group discussion and to work with the Steering Committee to shape the work of their groups into a draft strategic framework. Through their involvement in a 4-hour facilitators' workshop and their role in building the final strategic framework, these individuals not only became strong advocates for the workshop outcomes but also developed strategic planning skills that they were able to take back to their own organisations.

The strategic framework was developed through a series of sessions, each designed to explore one element of the framework. Every session began in plenary with a small presentation on the specific element, such as "What is a vision?", followed by group work using a discussion tool that was developed using feedback from the stakeholder survey. Following the group work, one person from each group came together with other group representatives to consolidate and reach consensus on that particular element. The consensus result was then presented in plenary for final whole-group discussion and approval. This process helped develop trust and consensus building amongst the participants, elements that were lacking going into the workshop.

All participants represented their group at some point in the process, and the majority of participants made a presentation to plenary. This approach helped build ownership of the process and the confidence and presentation skills of individual participants.

On the final day of the workshop, the complete strategic framework was presented to the Minister of Sport. The Minister of Sport responded with enthusiasm for the openness, inclusiveness and transparency of the process and the direction and contents of the plan. He tied the strategic goals to his government's priorities and direction for sport in Zimbabwe. The involvement of the Minister of Sport provided an excellent vehicle for prompt, direct communication with and endorsement by government. It also generated good photo opportunities for the members of the media who were present. Considerable additional media interest was evident in the days following the workshop.

### **ZOC Strategic Framework**

The ZOC strategic framework is presented here.

#### **Vision**

The Zimbabwe Olympic Committee facilitates the advancement of high-performance sport persons to win Olympic medals in Beijing 2008.

#### **Values**

The Zimbabwe Olympic Committee believes in:

- Ethical conduct
- Transparency and accountability
- Respect for others
- Integrity
- Commitment

#### **Mission**

To promote and protect the Olympic and Commonwealth Games Movements in Zimbabwe and to facilitate quality participation in the Games.

#### **Roles**

1. To promote and support Olympism and high-performance sport.
2. To ratify and enter the Games Team.
3. To implement Olympic Solidarity Programmes in partnership with National Sport Associations and other stakeholders.
4. To promote fair play, anti-doping and equity in sport.
5. To appoint or nominate representatives to IOC and CGF related positions and programmes.

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## CASE STUDY 2 (continued)

**Strategic Priorities and Goals (Objectives)****— Games**

- 1.1 To ratify the selection, facilitate the final preparation and lead a quality, medal-winning team to the Games.

**— Capacity Building**

- 2.1 To help build the capacity of National Sport Associations in order to increase the number and quality of high-performance athletes.
- 2.2 To be a key partner in the development of an integrated sport system for Zimbabwe.
- 2.3 To develop and support Zimbabwean sport persons as international leaders in Regional, Continental and International Federations.
- 2.4 To increase the knowledge, skills experience and number of coaches and sport administrators.
- 2.5 To provide opportunities for women and athletes in leadership.

**— Facilitating Athlete Development**

- 3.1 To facilitate the access of high-performance athletes to training programmes, international competitions, scholarships and financial resources.
- 3.2 To educate athletes with respect to Olympism, placing particular emphasis on fair play and anti-doping.
- 3.3 To facilitate the advancement of female athletes in high-performance sport.
- 3.4 To involve athletes in decision-making within the ZOC.

**— Business Development**

- 4.1 To market the ZOC to all stakeholders and partners.
- 4.2 To become an organisation that integrates strategic business planning, monitoring and evaluation in all aspects of its business.
- 4.3 To develop policies, procedures, systems and structures to efficiently manage the ZOC.
- 4.4 To optimise the use of technology.
- 4.5 To mobilise the financial and human resources necessary to implement the strategic and business plans of the ZOC.

**► Action Plan**

The Steering Committee reconvened to develop a template and critical path for development of the action plan that would be the engine behind the framework. Strategies identify activities, tasks and approaches to be undertaken in order to achieve the success measure; responsibility, meaning the person or committee responsible for delivering on the success measure; timeline, or the date by which the success measure was to be achieved; and finally, the resources required. The latter was not as well developed as it could have been. Table 2.12 shows the action plan that was developed for goal 1.1 of the ZOC, to ratify the selection, facilitate the final preparation and lead a quality, medal-winning team to the Games.

Table 2.12 Action Plan for Goal 1.1

Success measures	Strategies	Responsibility	Timeline	Resources
<b>Athlete performance</b> Qualification 2004, 2006, 2008 Personal best times National records Finalists/equivalent Medals 2004, 2006, 2008	Set team selection policy.	Board	8/2003	Human
	Set appropriate selection criteria.	Board	8/2003	Human
<b>Team management performance</b> Actual team performance Athletes' feedback General team management (GTM) feedback Performance appraisal	Enforce selection criteria.	Technical Commission	4/2003	Human, financial and material
	Consult with the IOC and IFs.	Technical Commission	4/2003	Human
	Establish performance targets.	Technical Commission	5/2003	Human
	Set GTM policy guidelines.	Board	3/2003	Human
	Implement GTM policy guidelines.	Board	4/2003	Human, financial and material
	Set final team preparation guidelines.	Technical Commission	3/2003	Human and financial
	Evaluate process and performance.	Board	11/2003⇒	Human
	Provide honest feedback on the process and performance.	Board	11/2003⇒	Human

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## CASE STUDY 2 (continued)

**► Control and Evaluation**

The ZOC Board's monitoring, led by the Secretary General, focuses on progress towards the success measures. If progress is not being made, action is taken. Strong emphasis was placed on ensuring that the action plan helped keep the ZOC focused on its objectives (strategic goals) by clearly identifying expected PIs (success measures). For this reason, success measures are the first item in the action plan.

The ZOC experienced its best ever results in Athens, including bronze, silver and gold medals in swimming; a semifinal in athletics; and a quarterfinal in tennis. In January 2005, the ZOC recognised that the volume of work created by the implementation of the strategic plan and positive spin-off from the success in Athens required more support than volunteers, especially the Secretary General, could provide. With finances stable and a bright future ahead, the ZOC hired its first CEO, effective March 2005. It is worth noting that in November 2003, the Board, as part of its ongoing monitoring and evaluation, had added the employment of a CEO as a success measure under the business development strategic priority, goal 4.5: "To mobilise the financial and human resources necessary to implement the strategic and business plans of the ZOC". The ZOC continues to monitor performance against its success measures on a regular basis and take corrective action as required.



This case study shows that planning can be well organised, involve all stakeholders and have adequate time allocated to it. It also shows that other work sometimes interferes with the planning process, such as the Commonwealth Games, and that the process needs someone to champion it, in this case the Secretary General. The process that was followed in order to develop the ZOC's strategic plan was thorough, inclusive and well planned, and this process can be followed by all types of OSOs. The ZOC sought funding to employ a consultant to help with the process. Although there may have been some delays, the end result has provided the ZOC with vision and direction. The OSO now benefits from planning in that it has objectives to help determine priorities, decisions are based on the strategic framework and the organisation is financially stable.