

Quest 2012 - Purpose 1

Business Planning



Outcomes

- The management has clearly identified its purpose, setting out specific and measurable objectives
- External factors have influenced the development of the business plan objectives
- The staff and stakeholders are involved in developing and delivering the business plan objectives
- The business plan objectives and measurable outputs are reviewed regularly
- Defining clearly what the organisation is trying to achieve and why.

PLAN

Influenced by local and national strategies, how has the organisation identified its purpose in developing the business plan?

EXAMPLES OF BEST PRACTICE

- Mission statement
- Influence from external factors (local and national strategies)
- Research
- Corporate objectives
- Objectives linked to measurable outputs
- Target dates and planned reviews

GUIDANCE

- An effective mission statement should be clear, concise and be able to identify what the centre or organisation is trying to achieve
- Has the development of the business plan objectives been influenced by external factors (local and national strategies), such as the local authority cultural strategy, community sports networks and county sports partnerships, National Governing Bodies (NGB's), national sports councils, professional bodies and the government.
- Has research from some of these external factors (listed above) influenced the development of the business plan objectives
- Do the development of the business plan objectives take into account overarching corporate (council, contractor and/or trust) business and cross-cutting social objectives
- Do business plan objectives clearly align with 'measurable outputs', do the objectives have tangible actions that will be taken in order to achieve the objectives
- Do each of the measurable objectives have target dates for their review and completion
- Is it evident that staff development is built into the business planning process and seen as an investment for success
- Is there evidence of forward planning, business development, innovation for the growth and sustainability of the service over the longer term

DO

How are the staff and stakeholders involved in developing the business plan?

EXAMPLES OF BEST PRACTICE

- Staff consultation
- Customer and partner consultation
- Objectives aligned with partner organisations
- Business improvement and development action planning- short term and long term

GUIDANCE

- Is there evidence that staff members are asked to contribute to the development of the business plan objectives
- Are customers and partners consulted about the development of specific objectives
- Are there examples of how business plan objectives are aligned to those of partner organisations
- Are action plans linked to the business plan objectives, which include delegated tasks to be achieved by the team

How are staff and customers/partners informed and updated about the business objectives? (Challenge for operational staff)

EXAMPLES OF BEST PRACTICE

- Delivery of business objectives and action plans
- Summarised / abridged business plans
- Staff notice boards and/or websites
- Staff meeting / briefing sessions
- Stakeholder briefing sessions
- Induction
- Displayed in public areas/websites
- Staff reminders of the organisation's/centre's values and its purpose

GUIDANCE

- Are the staff encouraged to assist in the delivery of the business plan objectives
- Are copies of the business plan (summarised or not) distributed to staff and/ or displayed on staff notice board(s)
- Is there evidence that staff briefings have taken place where the business plan objectives are explained in detail
- Is there evidence that stakeholder briefings have taken place where an overview of the business plan objectives are explained
- Are actions in place to assist the staff to understand the bigger picture and the longer term direction of the business
- Does the staff induction process involve a clear simple explanation of the business plan objectives
- If the organisation displays the business plan objectives in a public area is it done in a sensitive manner
- Are regular reminders on all written communication to the staff, to reinforce the value put on the organisation's purpose and key objectives
- Are steps taken by the organisation to constantly remind the staff about its purpose and its business plan objectives

Are there sufficient resources available for staff to deliver the objectives set out in the business plan?

EXAMPLES OF BEST PRACTICE

- Budgets linked to objectives delivery
- Allocation of responsibilities
- Partnership resources
- Staff training
- Policy and procedure systems

GUIDANCE

- Is the financial plan linked to the delivery of the business plan objectives and subsequent actions
- Has tasks from business plan and actions plans been delegated to staff members
- If the centre is reliant on its partner(s) to deliver specific objectives and actions, has it been established that they have adequate resources in place to achieve the desired outcome
- Is partner funding provided (if applicable) to enable staff to be trained in order to carry out and deliver the assigned objective effectively
- Management ensure that staff are trained in any relevant procedures and policies; and any changes actioned accordingly

MEASURE

How do you measure?

EXAMPLES OF BEST PRACTICE

- Built in measuring process
- Clear strategic KPIs/ Balanced Scorecard
- Social Return on Investment.

- Regular Review and Progress Meetings
- Partner Review and feedback

GUIDANCE

- Is there a clear performance management process in place, which enables management to determine whether the business plan objectives are measured and evaluated on an on-going basis
- Do the meeting minutes track the progress of resources made available for the delivery of delegated tasks
- Are partners regularly providing quantitative and qualitative data

REVIEW

How do you review what you measure?

EXAMPLES OF BEST PRACTICE

- Business plan milestones and targets
- Measurable objective update on a regular planned basis
- Subsequent action required to achieve desired outcome
- Review meeting minutes

GUIDANCE

- Can management change and/or amend aspects of the business plan to ensure that it remains 'live' and 'real'
- Are the measurable outputs and action taken to achieve the objectives sufficient and/ or on course to meet the desired outcome
- Are subsequent and/or additional actions delegated to staff in order that the desired outcomes can be achieved
- Are staff meeting minutes used/ reviewed to identify what action(s) remain outstanding and also to track the action taken in order to achieve the business plan objectives

IMPACT

Has what you have done made a difference?

EXAMPLES OF BEST PRACTICE

- Greater transparency
- Staff involvement
- Achievement of "bottom line" objectives for finance, partner/stakeholder engagement people, operations and society
- Learning, development and innovation/enterprise
- Increased participation and retention/progression
- Further investment/external funding/income generation
- Further partner opportunities

GUIDANCE

- Has the team's involvement in the development and delivery of the business plan objectives led to a greater transparency of the entire process
- Does the teams involvement mean that the business plan objectives are achieved more effectively and/ or within the desired timeframe
- Can the organisation demonstrate how the business plan objectives have influenced its impact on income generation and/or expenditure reduction
- Is it evident that the business plan objectives have had a positive impact on the service resulting in additional income, attendances, partnership working and progression/ retention
- Has the achievement of business plan objectives lead to additional investment/external funding
- Has the organisation's achievement encouraged potential partners to become involved