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# Strategic Plan, Developing and Implementing

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The success of an association depends on practical and careful planning. Developing strategies to reach identified objectives and goals is an activity that requires internal and external assessments, putting together a written plan, staying focused, and being accountable.

## **What is Strategic Planning?**

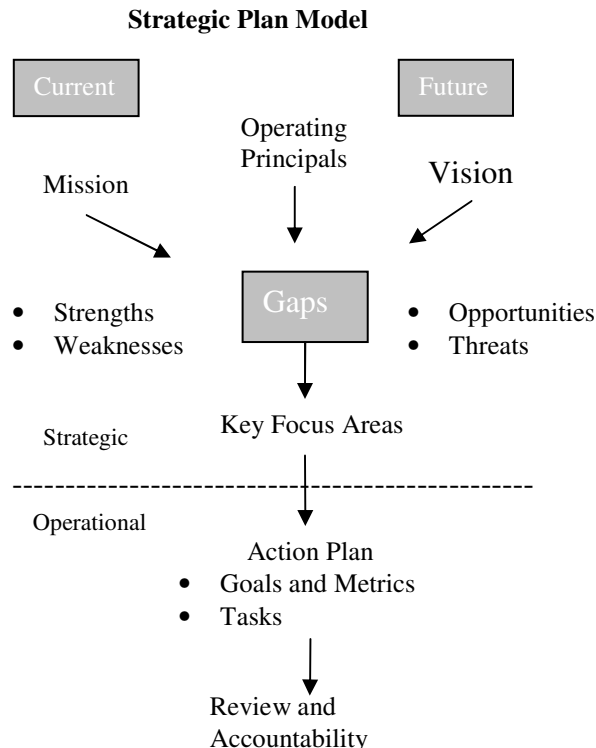
Strategic Planning is the process of:

- Determining the reason for being.
- Identifying the best future for the association.
- Deciding how the association will get there.

A strategic plan is a tool that defines, shapes and guides the association. It establishes decision making criteria and creates proactive involvement in the purpose and direction of the association. Simply put, the strategic plan will be the association's roadmap to the future.

The components of a strategic plan include:

- Operating Principles
- Mission
- Vision
- Internal & External Assessments
- Key Focus Areas
- Action Plan
- Review/Accountability





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## **USBC Operating Principles**

The USBC Operating Principles define the fundamental beliefs that guide and inspire the association. The operating principles shape an association's culture as well as provide a code of conduct. USBC Headquarters recommends all state and local associations incorporate these operating principles:

**Risk Taking** – Willingness to prudently challenge the status quo, and accept responsibility and accountability for our actions.

**Inclusiveness** – Actively embrace all individuals who play, watch, support, or promote the sport of bowling.

**Teamwork** – Utilize the collaborative efforts of participants, volunteers, staff, and allied organizations for the good of the sport.

**Integrity** – Commitment to the highest ethical standards including honesty, trust, loyalty, and open communication.

**Excellence** – Continually strive for excellence to include outstanding service and value.

**Fun** – Promote an environment where innovations, interaction, and creativity will enhance the enjoyment of the sport.

## **Mission**

The association's mission statement provides a broad description of the association's purpose, which is its reason for existing. A mission statement is realistic and factual, and answers three questions:

1. Who are we?
2. What do we do?
3. Why do we do it?

The mission statement should be:

- Feasible, understandable and concise.
- Broad and continuing in nature but not so broad as to be meaningless.
- Stated in terms of results rather than activities, what versus how.
- Worded specifically and purposefully.

The USBC Mission Statement is:

***“The United States Bowling Congress, as the national governing body, ensures the integrity and protects the future of the sport, provides programs and services and enhances the bowling experience.”***

All USBC associations share the same mission statement. However, state and local associations should amend the statement to include their association name:



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*“The \* insert state/local association name \* ensures the integrity and protects the future of the sport, provides programs and services and enhances the bowling experience.”*

### **Vision**

The strategic vision statement describes what the association should look like in the future and what it wants to accomplish or become. A vision is not an idle dream or magical solution to today’s organizational problems and deficiencies. An effective vision statement is inspirational and provides a clear, vivid image of what the association should become if its full potential is realized.

USBC’s Vision Statement is: **“Grow the sport of bowling.”**

All USBC associations share the same vision. However, state and local associations should amend the statement to include their association name:

**“The vision of the \* insert state/local association name \* is to grow the sport of bowling.”**

### **Internal Assessment**

Each association should conduct its own internal assessment. The internal assessment is in reference to the association. It is not an assessment of bowling in general, associations as a whole, or issues not respective to the specific association. To attain the best results, a candid, honest evaluation supported by data and facts is required.

### **Strengths**

Strengths are areas of superior performance that significantly contribute to fulfilling the association's mission. They are things the association does better than most others. Examples: recognition programs, tournament, communication with members, and customer service.

### **Weaknesses**

Weaknesses are areas of substandard or poor performance that prevent or inhibit meeting customer needs and/or fulfilling the association's mission (a.k.a. its purpose). Examples: operational problems, poor communication, lack of innovation, and insufficient number of volunteer workers.

Many associations will identify far more strengths and weaknesses than can be effectively addressed. The intent is to identify the three to five key focus areas in each category that can realistically be approached within the next planning cycle.

### **External Assessment**

The External Assessment focuses on the environment surrounding the association. It is based on data and facts, not speculation or chance occurrences. These components are out of the association’s control, but have significant affect or impact.

### **Opportunities**

Opportunities are external tools, trends, or events advantageous to the association and on which the association can capitalize or use as energizers for growth and improvement. Opportunities



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provide valuable assistance and help the association achieve its vision. Examples: partnerships, piggyback mailings, and a bowling center database.

### **Threats**

Threats are barriers, obstacles, or situations beyond the control of the association that should be avoided or anticipated as they may prevent successful achievement of the association vision. Examples: government legislation, closing of bowling centers, declining market due to job loss or plant closings, and increased postage costs.

Many associations will identify far more opportunities and threats than can be effectively addressed. The intent is to identify the three to five key focus areas in each category that can be approached realistically within the next planning cycle.

### **Key Focus Areas**

Key focus areas are priority issues, critical success factors, or key result areas must be addressed if the association is to continue to successfully deliver its mission and move toward achievement of its vision. They can reflect long standing problems or recent events anticipated to have a significant impact on the association. The selection of issues is important because it determines the range of decisions association leaders will consider in the future.

Each key focus area covers a broad area that is critical to the association's future success. The broad issues may only slightly change from year-to-year, however, the programs designed to address them may, and often do, change. Key focus areas are derived from SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis results. The most beneficial include/incorporate at least one or more of each SWOT area.

Even if not apparent in the SWOT analysis, it is recommended that associations consider including these standards as key focus areas.

#### **Examples of key focus areas:**

- Membership retention and development
- Communication
- Association leadership training
- Tournament marketing

### **Strategic Action Plan**

This is perhaps the most challenging step. The action plan directs the commitment of the association to specific short and long term accomplishments. This is a plan for the future, keeping in mind that an unfunded plan is no plan at all, just as an unfunded task is no task (see "Tasks," defined later in this section).

The action plan begins with the key focus areas. Each key focus area should have at least one goal and several tasks.



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## Goals

Goals are broad statements projecting what the organization hopes to achieve in the next two to five years. Goals focus on outcomes or results and are qualitative in nature. Any goal statement should include a metric as a way or means of measuring progress and completion.

GOALS CAN BE SIMPLE – Sample Goal 1: Increase overall membership.

OR GOALS CAN BE MORE AMBITIOUS – Sample Goal 2: Expand youth membership by developing an additional summer youth league.

Regardless of the complexity of the goal, there must be some metric or form of measurement to mark progress toward the completion of the goal.

## Metrics

A viable method of evaluation is used to determine the progress and achievement of any goal.

Metric for Sample Goal 1: Achieve five percent increase by August 2011.

Metric for Sample Goal 2: One new eight-team youth summer league with 40 members and maintain for three consecutive years.

## Tasks

Tasks are specific, concrete, and measurable statements describing what will be done within a fiscal year. Tasks are detailed, step-by-step actions/tasks required for goal achievement. These are the building blocks that lead to the attainment of the goals. Each task includes:

- What will be accomplished?
- Completion date
- Who is responsible for completion?
- Estimated cost (which is revised to actual cost once the budget, if any, has been finalized)

Sample Tasks for Sample Goal 1:

- Work with a local bowling center to create a league format for an after-work league.
- Identify eight local businesses (within 10 miles) that have enough staff to form a team.

Sample Tasks for Sample Goal 2:

- Create and distribute promotional material for the youth league.
- Develop a scholarship program to attract youth bowlers.

## Sample Strategic Action Plan Format

Each association's situation is unique, so each association will have different goals based upon its SWOT analysis. Regardless of whether a goal is modest or more involved, it should reflect an intelligent direction for the association.

The sample in the figure below is a suggested format to identify the association's goals, tasks, and measurements. Because each association may have a different focus for its goals, however, it may be modified to fit each situation.



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### **Review**

It is the duty of the association manager to update the board on the status of the strategic plan quarterly, if applicable. Therefore, it is advisable to schedule regular reviews of the strategic action plan to acknowledge progress, address problems and revise or add tasks. It is important to maintain a clear focus on the goals and direction of the association.

The strategic plan is a “living” document. For it to be effective, the association should adjust the plan whenever appropriate. The association should regularly review the action plans (goals, tasks) and to hold accountable those responsible for carrying out programs and completing tasks. Timely review and regular status updates allow the association to take corrective action when plans are heading off track, change priorities as the external environment and the internal situation changes, and re-allocate financial and human resources as necessary.

The entire strategic plan should be reviewed annually. Each year, completed tasks are replaced with new tasks, decisions are made on when and how to carry initiatives forward to the next year’s plan, and when needed, additional goals are added. The strategic plan should be completely reconstructed approximately every five years.

**See the next page for a sample action plan.**



**KEY FOCUS AREA: FUNDING**  
Sample Action Plan

Printed:

Last Updated:

Goal (2-5 Years)	Annual Task (Fiscal Year)	Completion Date	Point Person	Cost	Status
<b>Sample 1:</b> Expand the association funding base to support anticipated growth in programs and services. <b>Metric:</b> Fifteen percent increase in revenue within					
	<b>Sample 1.1.1:</b> Research and identify a minimum of 10 potential new sponsors.	Sept. 2009	John Doe	\$0	
	<b>Sample 1.1.2:</b> Prepare presentations and “sales pitch.”	Oct. 2009	John Doe	\$25	
	<b>Sample 1.1.3:</b> Make sponsorship presentations to potential new sponsors attempting to “close” no less than	June 2010	John Doe	\$0	
<b>Sample 2:</b> Expand non-dues revenue generating programs. <b>Metric:</b> Twenty percent increase in non-dues revenue by July 2010.					
	<b>Sample 2.1.1:</b> Increase awareness of existing programs and events by creating quarterly newsletter	July 2010	Bill Black	\$200	
	<b>Goal 1:</b> Expand Funding Base			\$225	