emPowering the Prairies

Club Development Series

A joint partnership between Rugby Alberta, Saskatchewan Rugby, and Rugby Manitoba.

Thank you for attending the emPowering the Prairies Club Development Series! This guide is meant to help you translate the lessons delivered in the presentations into action items that you can bring back to your club and board/executive. Throughout this guide you will find exercises that should help you identify where your club is at and how to take it to the next level.

COURSE INFORMATION

General Information

The emPowering the Prairies Club Development Series is a 4-week program designed to give club and program administrators information and tools to build a successful and sustainable organization. The course will cover topics about every off-field aspect of running a rugby organization, from strategic planning to how to fundraise effectively. The fundamental goal of this program is to give the attendees an idea of what best practice is in club administration and help clubs in the Prairie Provinces make tangible improvements to their organizations.

Each webinar will be made available in a shared drive with resources the following day.

As this course is in development, this document will be edited and updated throughout the duration of the course, and this should be considered a living document.

Rugby Manitoba, Saskatchewan Rugby, and Rugby Alberta would like to recognize that we collectively operate on the traditional homelands of many Indigenous peoples, as noted in Treaties 2, 4, 5, 6, 8, and 10, and the homeland of the Métis.

PEER LEARNING TIP: To get the maximum benefit out of this course, don't just complete this as an individual, find a group of people from your club to go through the course together!

If no one else from your club is interested, contact your provincial lead and we'll pair you with others in the same situation.

Week 1 THEME: INTRODUCTION & SELF ASSESSMENT

February 1, 7:30PM (Central) 6:30PM (Mountain) on Zoom. (90 mins)

10mins - Intro /w *Graeme Moffat (Rugby Alberta)*
10mins - Course Road Map /w *Patrick Ryan (Rugby Manitoba)*
10mins - Club Health Check presentation /w *Scott Harland (Rugby Americas North)*
10mins - Breakout Groups
10mins - Values based decision making /w *Pete Hourihan (Rugby Alberta/AJRA)*
10mins - Breakout Groups
30mins (Optional) - "Informal Social" discussion

Introduction

Learning Outcomes:

- **Purpose of the Club Development Series**
- **Understanding What You Want From the Series**

Notes:

To kick-off the emPowering the Prairies Club Development Series, we'll review the purpose of the program and what attendees are looking for out of the course (because we want to make sure that your most pressing questions are being answered).

If members of your club have missed this week's session, they are more than welcome to join in subsequent weeks. A full edition of this workbook will be available at the end of the course as a resource for your clubs. The exercises within the workbook will help you apply the lessons learned through the course to your club and with the rest of your Board/Executive.

Exercise #1:

Take a couple minutes to answer the following questions. At the end of the course, we'll revisit your answers to these questions.

1) What do you feel is your club's biggest strength as an organization?

2) What do you feel is the biggest area where your club could improve as an organization?

3) What area of the Club Development Series are you most excited about? What specific questions are you hoping to get answers to?

Course Road Map

Learning Outcomes:

- **Understanding Course Outline**
- **Designing a practical system for club operations**

Notes:

This section will consist of a quick overview of the course outline and themes for each week. We will underscore the importance of simplicity, this course is not comprehensive (if it was, we could deliver it for university credit!).

This course will emphasize a systems development approach to promoting club growth, creating a stable environment, and avoiding issues in the future. We'll also discuss the Fogg Behaviour Model (see "Tiny Habits" - BJ Fogg, Stanford University) - B=MAP (Behaviour = Motivation, Ability and Prompts) - and how you can harness it to benefit your organization.
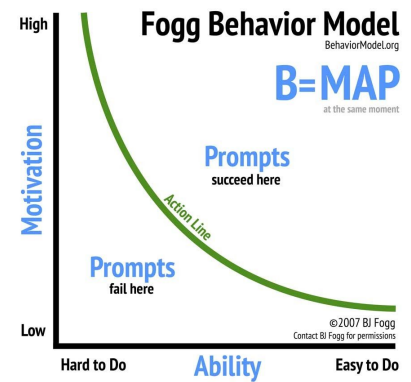
Exercise #2: Club Documentation Checklist

Over the duration of this club development program you should learn about all of the key management documents in the list below. Use the additional columns to check whether your club has these documents, who has access to them, and what your next steps should be (e.g. make available to the entire Board/Executive/Membership, create the document, etc.).

Governance & Management	Do We Have This?	Who Has Access?	Next Steps
Articles of Incorporation			
Bylaws			
Legal Entity Status			
Organizational Chart/Structure			
Most Recent Annual Report and Balance			
Strategic Plan			
Annual Activity Timeline and Calendar			
Minutes from Board Meetings			
Board Roster and Contact Information			

Board Policies and Procedures			
Membership Registration Form			

Tools	Do We Have This?	Who Has Access?	Next Steps
List of Internal Communication Tools			
Technology, Facilities, and Material Inventory			
List of Suppliers			

Leadership	Do We Have This?	Who Has Access?	Next Steps
Individual Development Plans With Annual Personal Goals			
Leadership & Management Philosophy			

Rugby	Do We Have This?	Who Has Access?	Next Steps
Code of Conduct (or equivalent)			
Safety and Welfare Measures Checklist			

Identity and Game Profile in the Organization			

People	Do We Have This?	Who Has Access?	Next Steps
Staff / Important Person Contact Sheet			
Job and Position Descriptions for All Roles			
Personnel Handbook and Employee Orientation Manual and Process (for volunteers and employees)			

Funding	Do We Have This?	Who Has Access?	Next Steps
List of Funding Sources			
Fundraising Plan			
Recent Sponsorship Proposals			
Budget of the Current Fiscal Year			
Current Financial Status			
Audit Report (if applicable)			

Club Health Check

Learning Outcome:

- **Identify Potential Issues Within Your Organisation**

Notes:

A "healthy" club is a successful club. However, not many clubs take the time to thoroughly review the health of their organization. They review whether they won the game and whether they have enough players to play but not the organizational and governance factors that underpin on-field success and club sustainability.

In this section we will help you learn how to review your club, and what the important factors are, so that you can confidently answer questions such as:

Do you have Short and Long term goals, and are you reaching them?

Do you have ample volunteers to manage tasks?

Is there a succession plan for leadership?

Exercise #3: Profile of Rugby Activity in Your Organization

Use the benchmarking tool below to help you understand the provision of rugby within your organization in the present and in the future. Highlight or circle your club's current status in one colour and the future aspirations in another colour.

Adult Playing Membership	Male only	More males than females	Evenly mixed membership	More females than males	Female only
Youth Playing Membership	Male only	More males than females	Evenly mixed membership	More females than males	Female only
Child Playing Membership	Male only	More males than females	Evenly mixed membership	More females than males	Female only
Player Pathway	Only male teams	More male than female teams	Teams at every level and gender for children/youths/ adults	More female than male teams	Only female teams
Format of the Game Available	Only 7s	More 7s than 15s	15s and 7s throughout the pathway	More 15s than 7s	Only 15s
Community Involvement	Full involvement with community, local rugby development programs in place	High involvement with community	Some involvement with community	Low involvement with community	No involvement with community, no development programs in place
Facility Provision	Own pitch and facilities with full access	Own pitch and facilities with shared use	Lease pitch/facilities with full access	Lease pitch/facilities with limited access	No access to pitch or facilities

Exercise #4: Stages of Organizational Development

Use the following charts to identify how your club and Board currently operate as an organization. Each chart is a continuum and you should select (highlight/circle) the option that best describes how your club operates at this moment in time. You can also use these charts as a roadmap for where you want to take your club in the future.

Generally speaking, the leftmost option in each chart represents a casual or minimal approach to management/organization while the rightmost column represents the best practice for running a successful, sustainable organization. Your club's specific circumstances – e.g. availability of resources, money, and volunteers – will determine where you fall on each continuum and which level you might aspire to.

Governance and Management

What best describes the function that your Board/Executive serves?

The Board does everything. It is the main supplier of energy, direction, and even money. It has a solely executive function.	The Board fulfills both governance and executive functions. Nobody makes independent decisions.	The Board has a primarily governance function, although its presence and economic power is predominant.	The Board serves only a governance function. The executive function of the organization is separate, both financially and operationally.

Organizational Levels

How does your club separate government (strategic direction), management (oversight), and operations (getting things done)?

The government, management, and operations are performed by the same individuals.	Government and management go hand in hand. Operations are performed by a separate workforce (e.g. volunteers).	Clear differentiation in the individuals performing the three levels of government, management, and operations.	There is a specialized focus at each level of government, management, and operations.

Focus

How does your club's Board/Executive focus its energy?

Focus is on execution of specific action items on the to-do list.	Focus is on managing one-time projects with a specific set of goals.	Focus is on building long-term programs that align with strategic goals.	Focus on general management of the club, ensuring that the resources are available to achieve strategic goals.
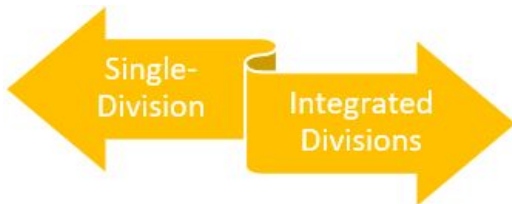
Organizational Divisions

Does your club have separate divisions of operations (e.g. rugby, marketing, etc.)? How do these divisions support each other?

The club's activity revolves around playing rugby and other divisions are minimal or non-existent.	While playing rugby predominates, projects begin in other divisions.	There are multiple divisions within operations. All divisions work and have programs.	The divisions of the club are integrated to produce high organizational performance and achieve strategic goals.

Strategy and Planning

How far into the future does your club plan for?

Exist: 0-1 year short-term planning. The club has an annual activity timeline.	Survive: 1-2 year medium-term planning. The club has an annual operations plan.	Consolidate: 3-5 year long-term planning. The club has a multi-year strategic plan.	Mature/Expand: 5-10 year long-term planning. The club has a multi-year strategic plan.
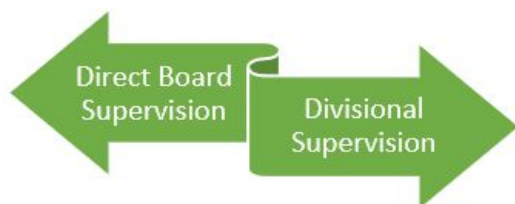
Style of Management

How does your club's Board/Executive supervise and evaluate the operations of the club?

The Board directly supervises individuals and activities.	The Board supervises the activities of the club and receives evaluation on its activities from club members.	Supervision is related to the task or function being performed.	Supervision is conducted on a divisional and personal basis within the structure of the club's organizational chart.

People

Who runs your club (from the Board/Executive to day-to-day tasks)?

A small team of volunteers conducts most/all club functions, including comprising the Board.	All roles are volunteer roles. However, there are volunteers outside of the Board who contribute to the operation of the club.	The club has at least one staff member to manage the operation of the club.	Most/all club functions are performed by paid staff members with minimal volunteer involvement required.

Tools

Are there systems and processes in place to help your club operations?

Systems are minimal to non-existent.	System development is minimal.	There are basic systems of finance, marketing, and production.	There are increasingly refined systems in all areas.

Dues & Donations ◄ **Sponsorships & Revenue** ►

Funding

How does the club obtain the funding required to operate?

The club's fundraising sources are player dues and donations from the Board. There is no fundraising strategy.	There is an informal fundraising strategy. Fundraising sources include dues, donations, and grants.	There are specific areas of fundraising. Sources of funds include dues, donations, grants, and some sponsorships.	Fundraising is at the forefront of operations. The club is more reliant on sponsorships and revenue-generating activities than player dues and donations.

Values Based Decision Making

Learning Outcome:

- **Understanding and create club Values**
- **Design values based club environment**

Notes:

Values are the core beliefs that transcend specific situations, and that shape the way people behave and make decisions.

Values describe what matters most to people, and within a Club context, they describe what the Club's ethical and cultural priorities are. Some people have described values as the glue that holds an organization together, uniting its people in a common purpose. When a Club's values are clearly communicated and widely shared, the organization will attract members, volunteers and leaders that contribute effectively to that common purpose.

Values-based sport is an approach that helps to establish an optimal environment that encourages the growth and development of athletes through sport. By fostering the development of good character, sport and physical activity skills, and a sense of community and belonging, values-based sport can help to develop good athletes and good people.

World Rugby Values:

- Integrity
- Passion
- Solidarity
- Discipline
- Respect

The Core Values enable participants immediately to understand the character of the Game and what makes it distinctive as a sport which is played by people of all shapes and sizes.
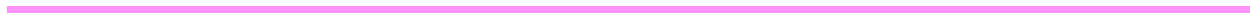
Exercise #5: Personal Values

Use the boxes below to list the values that you feel are important to your club and rugby as a whole. This is a personal and subjective exercise: what do YOU feel that your club and the sport represent? List as many or as few values that you feel apply to each category.

Club Values	Rugby Values

Exercise #6: Comparing Personal Values

At your next Board/Executive meeting, have the rest of your group complete Exercise #5 as individuals and then compare answers. Ask yourselves the following questions as a group:

a) Is there a broad consensus on the values of your club?
b) Is there a broad consensus on the values of rugby?
c) Are there areas of disagreement about the values of the club and rugby as a whole? If yes, are the identified values incompatible or can they co-exist?

Use the answers to these questions to come up with a set of common values that the entire group can agree on.

Exercise #7: Creating & Evaluating Your Value Statement

Does your club have an existing value statement or codified set of values?

If Yes:

a) What is your club's value statement or codified set of values? (Use the box below to write it down.)

b) Does this existing set of values match with the values that your Board/Executive identified as a group in Exercise #6? If they are different, which set of values do you think best represents your club? If the values that best represent your club are not the existing codified values, make a plan to amend the club's values that involves consulting the entire membership of the club.

c) Evaluate whether the activities and programs that your club runs/participates in are consistent with the set of values that best represent the club. Can you tie each activity or program back to one or more of the values you've identified?

If No:

a) Use the values identified in Exercise #6 to create a club value statement or codified set of club values. Make sure to consult the entire membership of the club before finalizing this value statement.

b) Evaluate whether the activities and programs that your club runs/participates in are consistent with the set of values that best represent the club. Can you tie each activity or program back to one or more of the values you've identified?

Week 2 THEME: PLACES

February 8, 7:30PM (Central) 6:30PM (Mountain) on Zoom. (90 mins)

5mins - Intro */w Graeme Moffat (Rugby Alberta)*
5mins - Breakout Groups - Week 1 Recall
10mins - Governance, Board, and Structure /w *Maria Samson (Rugby Canada)*
10mins - Breakout Groups - Discussion
10mins - Policy Development: A Safe Sport Perspective /w *Paul Hunter (Rugby Canada)*
10mins - Breakout Groups - Case Study
10mins - The Planning & Review Process /w *Scott Harland (Rugby Americas North)*
10mins - Breakout Groups
20mins (Optional) - "Informal Social" discussion

Governance, Board, and Structure

Learning Outcome:

- **Learn what governance is and the importance of good governance.**
- **Learn how to develop a governance framework to support your club's goals.**

Notes:

Effective governance is an oft-overlooked aspect of volunteer organizations whose attention is primarily focused on the immediate to-do list. This is a natural consequence of the limited bandwidth and energy that volunteers possess. However, it is not a necessary consequence.

In this section, you will learn about the importance of effective governance for your club and how to develop a governance structure that aligns with the goals that your club wants to achieve.

Exercise 8: Identifying Organizational Functions

When determining the type of structure that is necessary for your organization, it is important to understand what types of functions your club fulfills and what individuals within the club fulfill these roles. These roles can be fulfilled by a single individual, a volunteer committee, or be combined with other roles into a single position's duties (e.g. "Marketing/club promotion" and "Public/media relations" might be combined in a "Communications Coordinator" role).

It is also important to know if the current structure is producing the best results for the club. Are your current positions too much work for a single person to accomplish (i.e. too big of a job description)? Do you have a "committee" but you can never find enough members for it? Is one person responsible for too many roles (such that it will be impossible to replace them when they retire)? These are the types of questions that you should be asking yourself on a regular basis.

Use the chart below to identify who currently performs key functions within your club and what, in your opinion, works/doesn't work about the way things are currently done. If a role on this list doesn't apply to your club (e.g. fields or referees are taken care of by a provincial union or sub-union) just mark it as not applicable and focus on those that are applicable. Add any other club functions not listed in the blank rows at the bottom.

Function	Current Structure	What Works/Doesn't Work
Strategic Direction		
Policy and Documentation		
Finances		
Fundraising		

Sponsorship		
Membership/ Recruitment		
Marketing/Club Promotion		
Social Events		
Scheduling		
Club Communications		
Social Media		
Junior Rugby		
Womens Rugby		

Mens Rugby		
Minor Rugby		
Alumni Relations		
Coaching		
Referees		
Facilities (Management and/or Rental)		
Field Maintenance		
Awards/ Nominations		
Registration/ SportLomo		
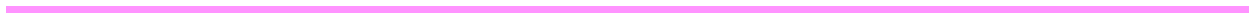
Equipment/Kit		

Exercise 9: Analyzing Division of Labour

Take the list of functions from Exercise #8 above back to your Board/Executive. As a group, answer the following questions:

1. Are the individuals tasked with the strategic direction of the club also performing other tasks? Do the other tasks they are performing leave sufficient time for setting and managing the strategic direction of the club?

2. If you have individuals who are performing multiple functions within the club, are these functions logically related or are they completely separate?

3. Does the current structure put your volunteers at risk of burnout by requiring them to manage multiple tasks?

4. Are there any areas that are currently managed by a single individual where extra volunteers or a Committee structure would be beneficial?

Exercise 10: Determining the Optimal Structure

Taking the information gathered in the previous two exercises and drawing on information presented in the course, discuss with your Board/Executive what an ideal organizational structure would look like for your club. Write out your ideal organizational chart either on paper or using a free online app (programs such as Lucidchart, SmartDraw, or Visme are free to use but require you to create a no-obligation account). Keep this document handy as an illustration of where you want the club to be in the future.

Policy Development: A Safe Sport Perspective

Learning Outcome:

- **An understanding of risk management and mitigation strategies**
- **An understanding of SafeSport principles**

Notes:

Being an amateur sports organization that creates activity and development opportunities for individuals of all ages has lots of rewards. However, it also carries a lot of potential risks for discrimination, harassment, and abuse. One way to protect yourself from this risk is by creating a robust policy framework in line with SafeSport Canada principles.

In this section you will get an understanding of SafeSport principles, how to identify risk, and what an effective policy framework looks like. Further resources will be made available for your club to develop its own policies.

Exercise 11: Current Club Policies

Policies set the expectations that the club has for its members and its community. However, many clubs do not have specific policies, such as a Code of Conduct, for their members to abide by. As a Board/Executive, take an inventory of your club's policies as well as the policies that your club is subject to from Rugby Canada, your provincial union, and any applicable sub-unions. Identify if there are any gaps in your club's policy framework.

Exercise 12: Creating Policies

Using the knowledge you gained during the previous exercise, use the resources below to help you create policies for your club. Remember that club policies create ownership for your players and community members, even if they are similar in spirit and wording to other policies at a provincial or national level.

Sport Information Resource Centre

Rugby Alberta Policies

The Planning and Review Process

Learning Outcomes:

- **Consider some methods and important factors for building a strategic plan**
- **Review the importance of managing an implementation plan and look at a sample**
- **Practice developing an implementation plan for a sample strategy**

Notes:

A lot of the emphasis in the emPowering the Prairies Club Development Series has been on the sustainability of clubs and their operations as a foundation for success. A key piece of developing a sustainable club is the presence of a long-term plan that can be implemented regardless of the specific individuals involved.

However, as an amateur, volunteer-based organization the task of creating and implementing such a plan may seem daunting. In this section of the course we will cover how you can build a strategic plan and implementation plans for your club. Further materials will be made available in the course resources folder.

Exercise 13: SWOT Analysis

A SWOT Analysis is an exercise for helping an organization evaluate its resources against the external environment as part of the strategic planning process. The purpose of the SWOT Analysis is to identify these resources and external factors such that the organization can build on its Strengths, eradicate its Weaknesses, recognize and exploit Opportunities, and plan for Threats. A SWOT Analysis does not require any particular expertise, only a thorough knowledge of the organization.

Use the table below to perform a SWOT Analysis of your organization. Be comprehensive.

Strengths What do you do well? What unique resources can you draw on? What do others see as your strengths?	Weaknesses What could you improve? Where do you have fewer resources than others? What are others likely to see as weaknesses?
Opportunities What opportunities are open to you? What trends could you take advantage of? How can you turn your strengths into opportunities?	Threats What threats could harm you? What is your competition doing? What threats do your weaknesses expose you to?

Exercise 14: Long-Term Vision - A Personal & Collective Exercise

Long-term goals are allowed to be ambitious and a little unrealistic. As they say, dream big! Once you have a long-term vision you can then focus on specific actions that will move you closer to these goals.

This is a two-part exercise. First, use the table below to write down where you, personally, want to see your club in 5 years. We've included some topic areas but you should feel free to add as many ideas as desired based on the structure and activities of your club. Second, have the rest of your Board/Executive complete this exercise and then compare your visions for the future.

Division	Focus Area	Specific Outcomes
Organization and Structure	*(e.g. Organizational Chart)*	*(e.g. identify an ideal organizational structure, create an aspirational organizational chart, and transition from current structure to ideal structure)*
Governance and Policy		

Participation and Recruitment (including Volunteers and Administrators)		
Performance and Development (Players, Coaches, Referees)		
Facilities and Equipment		
Communications and Marketing		

Finances and Resources		
Other		

Exercise 15: Goal Setting

One of the keys to strategic planning is goal-setting. While setting goals may seem simple, it is important to make sure that your goals are Specific, Measurable, Achievable, Realistic, and Time-bound (a.k.a. SMART) to give yourself and your organization the best chance at accomplishing each goal. Use the exercise below as a template for setting a SMART goal.

1. What is the desired outcome? Be **specific** (i.e. well-defined, clear, and unambiguous).

2. How does this outcome help achieve your club's vision of success, mission statement, or strategic plan?

3. Who will be primarily responsible for achieving this outcome? If multiple individuals are responsible, what role will each play in achieving the outcome?

4. How will you **measure** progress on this goal and know whether it has been accomplished?

5. Is this outcome **achievable** for the organization (i.e. is it possible for the organization to accomplish - for example, it is likely not possible for a rugby club to cure cancer)? Why?

6. If it is achievable, is it **realistic** for the organization to achieve this outcome? What factors will affect the likelihood of success?

7. When will the project begin? When will it be accomplished by? Are there multiple stages to achieving this outcome? Establish **time-bounds** for achieving the desired outcome.

8. What non-human resources (e.g. equipment, space, certifications, money) are required to achieve this outcome? How will the organization acquire these resources?

Week 3 THEME: REVIEW

Progress Review

Use this 1 week break to catch up on any missed or incomplete activities with your group.

Week 4 THEME: PEOPLE

<u>**February 22, 7:30PM (Central) 6:30PM (Mountain) on Zoom. (90 mins)**</u>

5mins - Intro */w Graeme Moffat (Rugby Alberta)*
5mins - Review Quiz
10mins - Volunteer Recruitment & Retention /w *Patrick Ryan (Rugby Manitoba)*
10mins - Breakout Groups
10mins - Succession Planning /w *Scott Harland (Rugby Americas North)*
10mins - Breakout Groups
10mins - Job Descriptions /w *Andrew Shaw (Saskatchewan Rugby)*
10mins - Personal Development /w *Peter Houlihan (Rugby Alberta/AJRA)*
20mins (Optional) - "Informal Social" discussion

Volunteer Recruitment, Retention and Recognition

Learning Outcomes:

- **Volunteer Recruitment**
- **Volunteer Retention**
- **Volunteer Recognition**
- **Risk Management (Protecting your organisation)**

Notes:

Volunteer organisations are only as strong as their people, this section will assist you in developing a volunteer strategy to get the most out of your volunteers.

In this section, you will learn about the importance of understanding and meeting the needs of your volunteers and how clearly defining roles and communicating effectively improves their work satisfaction.

You will also learn some basic tools to implement a risk management strategy to protect your organisation against the threats that volunteer work can bring.

Exercise 16: Linking Qualities to Roles

Recruiting volunteers requires an understanding of the types of roles that you have available and what types of people will be successful in these roles. This is also important when trying to get away from the philosophy of "we'll take the first person who is interested" and move towards finding the right synchronicity between the individual and the role.

Use the table below to identify the volunteer roles in your organization and up to three personal qualities you feel would make an individual successful in this role. Include all the roles that you have in your organization, from titled roles such as President to untitled, casual roles such as minor rugby coach (alternatively, include the roles that you traditionally have trouble filling or are currently trying to fill). We have included a bank of personal qualities following the table but feel free to use others not on this list.

Role	Quality 1	Quality 2	Quality 3

List of personal qualities: adaptable, adventurous, ambitious, amiable, by-the-book, compassionate, considerate, courageous, courteous, creative, dedicated, diligent, empathetic, exuberant, frank, generous, gregarious, impartial, intuitive, inventive, passionate, persistent, philosophical, practical, rational, reliable, resourceful, sensible, sincere, sympathetic, trustworthy, unassuming, visionary.

Exercise 17: Benefit & Compensation Inventory

Volunteers have time and skills that the club wants to take advantage of. But does the club have anything for volunteers to take advantage of?

The volunteer relationship is a two-way street between the club and the individual. Yet too often we only focus on one of these directions, namely what the volunteer can provide to the club. An increased focus on the other direction - what the club provides the volunteer - can help increase the overall satisfaction and retention of your volunteers. Knowing what things your club can offer also helps recruit volunteers and give them clarity about their roles.

Using the table below, create an inventory of the type of benefits and compensation that your club offers to volunteers. Benefits and compensation can be monetary (e.g. an honorarium), gifts/in-kind (e.g. club swag), experiential (e.g. gaining experience in financial administration), or personal (e.g. satisfaction from completing tasks or contributing to causes). You can also use this section to list types of benefits and compensation that you think your club could provide to volunteers in the future (e.g. if you accomplish specific goals in your strategic plan). Not all benefits and compensation will apply to all the roles in your club and you should also identify who receives each type of benefit in the table.

Benefit	Type	Who Gets It?

Exercise 18: Creating a "Pitch" to Volunteers

In an ideal world, getting individuals to volunteer for your club would be as simple as asking. The good news is that it can be that simple, depending on HOW you ask. By catering your messaging to the individual, the role, and the benefits you can increase your chances of success when asking the question.

In this exercise, we will take the information you've compiled in Exercise #19 and Exercise #20 to create "pitches" to specific people for specific roles. The key to a good pitch is combining why you think an individual would be a good fit in the role (matching their personal qualities with the qualities identified in Exercise #19) and what they will get out of the role (from Exercise #20) with a clear explanation of the level of commitment required. Your pitch also depends on your intended audience; not only the specific individual but also a sub-section of your membership group.

In the space below, select 3 roles from your list in Exercise #19 and write a one-to-two sentence pitch for each role directed at a specific audience.

Example (Role: Treasurer, Target Audience: Club Membership): "We are looking for a diligent, responsible, and trustworthy individual to fill the role of our club Treasurer for the upcoming season. While the time commitment for the role is low, it is a great opportunity to brush up on your budgeting and financial management skills, have a say in how the club allocates resources to programs, and get your hands on some sweet club swag!"

Role: ⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚ **Target Audience**: _____

Role: ⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚ **Target Audience**: _____

Role: _____   **Target Audience**: _____

Succession Planning

Learning Outcomes:

- **Develop strategies and tools for succession plans and transition processes.**

Notes:

In this section we will work on how to recruit and develop potential successors for various roles, build timelines for changing of leadership, and put in place some essential steps for smoothing the transition process.

Exercise 19: Identifying Succession in Your Club

One of the only constants in amateur sport is volunteer turnover. It isn't a matter of IF you have volunteer turnover, but rather a matter of WHEN. Well-run clubs manage their volunteers and have a succession plan for moving individuals in and out of roles before they burn out or become disinterested, avoiding chaos and a rush to fill roles with any individual who is available.

Make a list of the key roles and individuals in your club (i.e. those holding positions or performing important tasks that the club couldn't function without). Does your club have a succession plan for each of these roles/individuals? What is the succession plan and what is the timeline for it?

Role/Individual	Succession Plan	Succession Timeline

Exercise 20: What Is Your Personal Succession Plan?

Succession planning is both a personal and organizational responsibility. As a volunteer and leader, you need to understand your personal commitment, energy level, and best-before date in your current role. You also need to understand your role in grooming a successor for your position and duties.

Answer the questions below honestly to get an idea of where you are at. If you feel comfortable, share the answers/what you've learned with the rest of your Board/Executive as a way of starting a conversation about the succession plan for your position.

Note: Keep this exercise in mind as you work through the Personal Development section below.

1. How long have you been in your current role?

2. How many hours per week do you usually devote to your role (average of in-season and off-season)?

3. On a scale of 1-5 (with 1 being low and 5 being high), what is your current energy/motivation level for the role?

1	2	3	4	5

4. Would you consider this role to be fulfilling (i.e. do you get a sense of personal satisfaction from completing your duties/tasks)? What aspects of the role excite you? What aspects of the role do you find tedious?

5. In an ideal world (personally, professionally, and volunteer-wise), how many more years would you devote to this role?

0	1	2	3+

6. What are your personal goals as a volunteer club administrator (personal being relating to yourself and your personal growth and development, not actions or results for the club)?

7. Do you have other volunteer roles that you would like to pursue (ideally rugby-related, but not necessarily)? If yes, what roles would you like to try?

8. Do you feel that you were successfully transitioned into your current role? What things would you do (e.g. transition meetings, introducing to key contacts, file transfer, etc.) to help the next person in the role succeed?

Exercise 21: Managing a Successful Transition

Once a successor has been identified for a given role it doesn't mean that the work of succession planning is done. In order for the transition from an existing volunteer to a new individual to be successful, work needs to be done to structure and manage the transition process. Use the checklist below to ensure that everything is in place to manage a successful transition.

Tip: Instead of scrambling to create all of these things before someone leaves a role, task each individual to keep an up-to-date copy of important information (e.g. contact lists, etc.) at all times.

Check	Item	Details
	Schedule of Transition Activities	A schedule of activities should be given to all participants in the transition activities. It is recommended that the activities be spread out rather than condensed into a short time period.
	List of Important Contacts	All contacts for the relevant role are accumulated in one place.
	Meetings with Key Contacts/Relationships	Introductory meetings should be arranged with key contacts and incoming and outgoing individuals to facilitate knowledge transfer and relationship-building (and to prevent the outgoing individual from needing to act as a go-between after they have left the role).
	Copies of All Relevant Documents and/or Contracts	In addition to providing the documents themselves, time should be set aside to review important documents and ensure that the incoming individual knows where to find said documents.
	Meeting to Review Duties and Expectations	This meeting should include the outgoing and incoming individuals and the direct supervisor of the role. To avoid conflict, it may be advisable to have separate meetings (i.e. one with incoming and outgoing, one with incoming and supervisor).
	Annual Calendar of Key Duties	The incoming individual should be provided with a breakdown of when key tasks should be performed, including as much detail as possible.
	List of Ongoing or Incomplete Tasks and Projects	A status report on the tasks and projects either in progress or incomplete at the time of transition, including an outline of the next steps for each task/project.

Job Descriptions

Learning Outcomes:

- **Understanding the importance of job descriptions within a volunteer context.**
- **Learn the basics of writing a job description/terms of reference.**
- **Identifying who needs a job description within your organization.**

Notes:

As has been discussed throughout the course so far, the people (volunteers) within your club are the most important factor for success and putting these individuals in the best possible position to succeed is the "secret sauce" to any well-run organization. To this point we've stressed the importance of setting reasonable expectations for volunteers that encourage them to buy-in and contribute. Part of setting these expectations, and ensuring that they persist through the transition from one volunteer to the next, is having written job descriptions.

In this section we will cover the importance of job descriptions, how to write them, and who needs one within your organization. While job descriptions and terms of reference are technically separate things (a job description generally applies to an individual's specific role and a terms of reference generally applies to the roles of members of a committee or board), we will treat them as the same in this section insofar as they both set expectations that you want your volunteers to follow.

Exercise 22: Writing a Job Description

Job descriptions are important documents for clubs to have to help guide volunteers through their roles. While writing these descriptions may seem daunting at first, there is a relatively simple formula that you can use to write job descriptions for the volunteers in your club.

Use the questions below as prompts for the important things to put in a job description. Once you've answered all the questions you will basically have a complete job description!

1. Position Title:

2. Who does this position report to?

3. What authority does this position have (e.g. signing authority, supervisory, etc.)? Does this position supervise others? If so, who do they supervise?

4. What qualifications and skills are required for this position?

5. List the general duties of this position. Include any "need to haves" (e.g. a specific "Annual Wind-Up event" would be appropriate to list for a Social Coordinator in addition to the more general duty of "organizing social events").

6. What is the term for the position? How long is the individual expected to fill the role?

7. What time or financial commitments are required to perform the role?

8. What benefits or compensation are attached to the position?

Exercise 23: Determining Whether A Job Description Is Required

With the variety of roles and tasks that exist within a club setting, there can be a question of what individuals should have a job description. Use the questions below to help you determine what job descriptions your club should have.

1. Does the individual have a legal responsibility to the club or on behalf of the club (e.g. a fiduciary duty as a Director of a Not-for-Profit Corporation)? If **yes**, there should be a job description outlining these responsibilities.
2. Does the individual have a title (e.g. Director of Communications)? If **yes**, there should be a job description attached to that title.
3. Does the individual contribute to a committee or sub-committee of the club? If **yes**, there should be a job description that outlines what members of the committee/sub-committee are responsible for that would apply to this individual.
4. Is the individual responsible for a program or project that comprises a number of tasks and activities? If **yes**, there should be a job description that outlines the programs or projects that are to be delivered.

If you've answered **no** to all four of these questions for a specific individual, it is unlikely that the individual would require a job description.

Personal Development

Learning Outcome:

- **Develop strategies and tools for personal development.**

Notes:

Personal development is a lifelong process. It is a way for people to assess their skills and qualities, consider their aims in life and set goals in order to realise and maximise their potential

Developing a Personal Vision - Some find it easier to motivate themselves to learn and improve if we have a purpose in doing so. A clear idea of where you want to be in a few months or years, and why - is a crucial part of developing this purpose.

Planning Your Personal Development - Once you are clear about where you want to be, you can start planning how to get there.

Recording Your Personal Development - It is often a good idea to keep a record of your personal development. By writing down key developments in your learning and development as and when they occur, you will be able to reflect on your successes at a later date.

Reviewing and Revising Personal Development Plans - For more effective learning, it is important to reflect on your experience, and consider what you have learnt from it. Regular review of your personal development plans, and your development activities, will ensure that you learn from what you have done. It will also ensure that your activities continue to move you towards your goals, and that your goals or vision remain relevant to you.

Before completing the exercises below, please make sure to complete Exercise #17 from the Succession Planning section above.

Exercise 24: Understanding Your Motivations, Methods, and Activities

In Exercise #20 above, you were asked to identify some personal goals and other volunteer roles that you find interesting. In this exercise we will investigate this line of thinking further to help you understand what motivates you to be involved with club administration, what tools, skills, and methods that you have in your repertoire, and what activities you want to be involved in. This is an aspirational exercise (i.e. looking towards the future) and not a descriptive (i.e. looking at the present) one.

Using a blank piece of paper (or blank Word, Paint, Canva, or other text/image editing software) write down your answers to the following questions. Feel free to use whatever format makes the most sense to you to answer the questions. You may feel that writing out statements makes more sense or that you want to create a vision board instead. Include as many ideas as you have in response to each question, even if the ideas seem inconsistent (this is a personal reflection and there are many possible pathways to follow within the volunteer environment).

1. **WHY**: What drives you as a volunteer? What is your purpose? Why do you get involved (both in general and specifically with rugby? Remember that this is a personal exercise, so your answers should apply to YOUR motivation and not the club/organization's need (i.e. your club might need a Treasurer, but why did YOU put your hand up to do it?).
2. **HOW**: What skills do you have in your volunteer tool kit that you want to improve upon? What skills do you want to learn as part of your volunteer experience? This should include any certifications or qualifications that you hold or want to achieve. What personal qualities do you want to develop as part of your volunteer experience?
3. **WHAT**: What type of rugby activities do you want to participate in as a volunteer (or as a non-playing participant such as a coach or referee)? What specific programs or organizations (other than your own) would you like to be part of? What activities or initiatives - that are not currently ongoing - would you like to lead in the future?
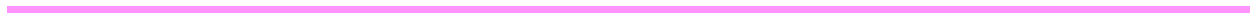
Exercise 25: Creating a Personal Development Plan

Drawing on your work from the previous exercises, identify some personal goals that you wish to pursue during your time in club administration and as a volunteer generally. Use the space provided to plan how you will achieve each goal (recall the principles of SMART goals discussed in Exercise #15 in Week 2). Remember that these are personal goals relating to your personal journey and growth (e.g. gain experience with managing finances and working with budgets) rather than goals for your club (e.g. gain new members, win games, etc.).

Goal	Details and Plan

Week 5 THEME: PROMOTIONS

March 1, 7:30PM (Central) 6:30PM (Mountain) on Zoom. (90 mins)

5mins - Intro /w *Jordan Astrope (Saskatchewan Rugby)*
10mins - Marketing /w *Bryan Kelly (Rugby Americas North)*
10mins - Community Partnerships /w *Erin Kennedy (Rugby Americas North)*
30mins - Fundraising (Events & Funding) - *Group Discussion*
5mins - Course Wrap Up - What Do You Want to See Moving Forward?
30mins (Optional) - "Informal Social" discussion

Marketing

Learning Outcomes:

- **How to use social media in alignment with club values and strategic goals.**
- **How to use social media to target specific recruitment demographics.**

Notes:

An effective and professional marketing strategy can work wonders for a club through increased recruitment and more successful fundraisers. With the advent of social media and online content marketing, it has never been easier for volunteer organizations such as rugby clubs to have a significant online presence. This section of the course will cover how clubs can use social media effectively to achieve their strategic goals.

Exercise 26: Choosing the Right Social Media Platforms for Your Club

There are two main factors that should influence which social media platforms that your club is active on: 1) what does your club have capacity for and 2) where is your target audience. Two major mistakes that organizations in all industries make are to try to be active on all platforms (and therefore not excel on any of them) and to devote time and effort to platforms that are not reaching their target audience. These mistakes are compounded when organizations begin to spend money on digital marketing through social media ad campaigns.

Use the information below to discuss which platforms you should be on with your Board/Executive.

	Facebook	Instagram	Twitter	LinkedIn	Snapchat	TikTok
Users*	2.8 billion	1 billion	330 million	500 million	314 million	1 billion
Main Age Demographic	25-54	18-35	18-35	30-49	14-24	10-39
Purpose	building relationships	sharing inspiring photos	news & conversation	news & conversation	conversation & sharing	video sharing & trend-setting
Recommended Activity	2-3x /week	1x /day	5x /day + interactions	3x /week	4-7x /week	1-3x /day
Best For	building brand loyalty	lead generation, inspiration, retail, art, entertainment	public relations	business development	targeting youth	targeting youth & generating buzz
Drawbacks	most restrictive algorithm	no link sharing, restrictive algorithm	280 characters or less	limited interaction, primarily individual-driven	non-curated content	no link sharing, hard to track analytics
Notes	Facebook and Instagram are owned by the same company, so users can link FB & IG accounts and share across both platforms		Users should take time to interact with people who reply to their posts and other users' posts	The LinkedIn algorithm prioritizes posts by individuals rather than organizations		

*User number information is approximate and clubs should understand user trends in their geographic area.

Exercise 27: Tips for Creating Good Social Media Content

Creating good content for social media can be a daunting task. However, the good news is that you don't need to be or hire an "influencer" to competently promote your club on social media. There are plenty of small things that you can do to create content that will be seen by more individuals. Review the tips below to help you create strong content for your club.

1. You can create professional-quality content with your phone camera and some free apps. Phone cameras take photos and videos at a high resolution and editing apps like Snapseed, Layout, and Boomerang (search them in your preferred app store) can help amateur photographers adjust the small details that a professional photographer would do with their camera. One caveat is that you should probably leave action shots to a professional sports photographer who has experience with shooting a moving target - their photos are almost always worth the cost.

2. When choosing which photos to post, prioritize photos that feature the faces of the pictured individuals. Not only do these photos get boosted in most algorithms but you can tag the individuals in the photo to increase the reach (how many people see it) of your post.

3. When posting video content, ensure that the first 3 seconds of the video contains exciting, catchy content, including choosing an evocative thumbnail photo for the video. 3 seconds is the average amount of time that individuals view a video before scrolling to other content. If you can't create this catchy opening, use a photo instead and include a link to the video content. Remember to post videos directly to the chosen platform (i.e. do not link/embed a YouTube video in your Facebook post) as social media platforms compete with each other and limit the reach of their competitor's content in their algorithms.

4. Do not overlay a large amount of text content over your photos and videos. It is best to have a "clean" photo/video and to put the text information that you want to convey into the copy (the words that accompany a photo, video, or link) of the post. At most, include a small number of words (3-5) that identifies the topic of the post and your club's logo in a tasteful manner (i.e. not obscuring the bulk of the photo).

5. Do not share a link, photo, or video without some form of text commentary to explain the content and direct your viewers.

6. Your copy (text) should include the following elements:
    a. A hook/lede that catches the viewer's attention. A common type of hook/lede that is used in social media marketing is to ask a question that prompts the viewer to read on for the answer (*Example: "Are you ready to get back to playing rugby?" which motivates people to read on for information on when rugby will be available*.)

b. A call to action that describes what you want the audience to do. The call to action could be "sales" focused (e.g. "buy your tickets here") or directing the audience to further information.

c. The basic relevant information that the audience needs to complete the call to action. For instance, it is important that if you are trying to sell tickets for an event that you include key information such as the date, time, and location of the event. Don't expect your audience to already know this information or to spend time trying to hunt it down themselves; assume that this post is the first time that they are seeing it.

7. Some things that you can do to increase the reach of your posts:
   a. Tag individuals, locations, and businesses in the copy of your post. This will show your post to their networks in addition to those who already like your page.
   b. Use hashtags at the end of your posts to have the post appear to more users who follow the specific hashtag. Do not go overboard with your hashtags, 3-5 will do just fine (if your hashtags take up more than a single line you may have too many).
   c. Schedule your posts for specific times during the day rather than posting whenever you have finished creating the post. The best time to post to get the best reach is around 11:30am on weekdays. This will have your post near the top of newsfeeds when individuals check their social media accounts on their lunch breaks. This tactic will help your existing followers see your posts in addition to others.

8. Consider boosting your posts to help them reach more people. Even if you have tons of followers on your page, platforms will often grind down the number of your followers that your posts get shown to. As a result, the post that you expected everyone to see and act on might not actually be shown to everyone. A small boost ($5/post for 1 day) can help break through the algorithms and show your post to more people both inside and outside your current follower group.

9. After you post, you should keep an eye on your post's interactions (likes, comments, and shares). This means responding appropriately to comments from viewers - both positive and negative comments - and (on certain platforms) inviting people who like your post to like your page (thus increasing your primary audience). In addition to being good customer service policy, most algorithms prioritize posts with more interactions and you can boost this through your actions following posting.
   a. When responding to negative comments on your posts (e.g. negative reviews or dissatisfaction with your post/activities), try to move the follow-up conversation to direct/private message rather than having it out with the commenter in public. An example response to facilitate this might look like: "*Hi NAME, we would like to understand more about your {concern/experience/complaint}. Please send us a direct message and we will get back to you as soon as possible.*"

Community Partnerships

Learning Outcomes:

- **Identify Appropriate Community Partners**
- **Know Your Worth - What can you offer?**
- **Execute Impeccably**

Notes:

Prospering in a community hinges on the community partnerships that are developed over time. This presentation will highlight the key elements of developing community partnerships, covering how to identify various partners, align values, identify opportunities, and solidify these relationships for success.

Exercise 28: What is Your Target Partner Audience?

Recall Exercise #7 from Week 1. In that exercise you identified your club's values. Part of forming strong community partnerships is matching your club's values with the values of your chosen partners.

Using your club's values and the table below, highlight the type of organization that you feel would correspond to each of your club's values. Be specific about the organizations that you feel would be good partners, considering their location, interests, and values. Remember that potential partners can be found in all industries and sectors - from for-profit private businesses to volunteer community associations.

Value	Potential Partner	Why Would They Be A Good Partner?

Exercise 29: Partnership Case Study

Your club has been approached by a [local construction/manufacturing company](#) with an interest in becoming a community partner. Answer the following questions to develop an execution plan for how you will approach this company and secure the partnership. Be detailed in your answers.

1. How do your club's values align with the company's values? Is there common ground?
2. How can your club benefit the company?
3. How can the company benefit your club?
4. How will you pitch this company on a partnership with your club? How will you cater this pitch to the unique mission, vision, and values of the company? What types of communication and presentation will you use in your pitch?

Exercise 30: Executing Partnership Pitches

Use the questions from the previous exercise to create execution plans for your desired community partners that you identified in exercise #28. While you may not have chosen specific organizations in exercise #28 (rather creating an image of the ideal partners that would correspond to your values), choose actual organizations in your community that fit the descriptions above to create your execution plans.

Fundraising (Events and Funding)

Learning Outcome:

- **Learn about successful fundraising strategies and important club revenue streams.**
- **Learn about best practices that other clubs have employed to make their events a success (financially and otherwise).**

Notes:

In this session, we challenge you to bring your ideas to the table! Does your club rely on membership dues to pay the bills? Do you have corporate activities that have created a revenue stream for your club? What fundraising events has your club put on that have been successful in raising money?

We will be asking the clubs on the webinar to share their successful strategies for raising money for their clubs. The world of fundraising is large and there are tons of ideas out there so we want to hear which ones have been successful for your club.

Exercise 31: What are Your Club's Revenue Streams?

Your club's revenue streams can be divided up in many ways depending on the number of different revenue streams that your club has. Four of the main categories, under which other line items may fall, are Memberships, Fundraising, Sponsorships, and Corporate. These four categories can be broken down as follows:

1. **Memberships**: Dues and fees paid by individuals to be part of the organization. Your club may have different fees for different categories of membership (e.g. player, volunteer, social, etc.) but all would fall within the Membership revenue category. The amount of revenue generated by this category is dependent on the total number of members in your club and the cost of your club's memberships.
2. **Fundraising**: Money raised through events, activities, and campaigns for the purposes of raising revenues for the organization. The line items in this category can be varied and diverse: events (e.g. steak nights), merchandise sales, bottle drives, personal challenges, donations, and member volunteerism (e.g.. when members volunteer at a local event in exchange for a donation to the club) are all examples of specific items that could be included under Fundraising. Revenues in this category are typically variable and depend on the success of the fundraising in a given year.
3. **Sponsorships**: This category contains sponsorships from local businesses and organizations, grants, and other forms of contracted funding (i.e. there is a written agreement guaranteeing such funding over a set period of time). This funding should be stable over the lifetime of the contract but may vary year-over-year as contracts finish or are renewed at new rates.
4. **Corporate**: This category encompasses revenues obtained from a form of independent business activity that the club engages in under the umbrella of a legally-constituted non-profit corporation. An example of revenues that would fall under this category would be any revenue that arises from the club owning their clubhouse (through either operating it or renting it to a tenant). These revenues can be variable and the business interests that generate them should be managed independently of the club by professional management.

For this exercise, break down your club's revenue streams into the four categories above and calculate the percentage of total revenue that each category provides. Complete this break down for the last 3 years of operations. When you are done, your Board/Executive should ask the following questions:

1. Is the breakdown between revenue streams stable and sustainable? Are the percentages of total revenue consistent (+/-5%) year-to-year?

2. Would the club benefit from diversifying revenue streams (i.e. more equitable distribution between the 4 categories) or growing one revenue stream in order to rely less on another?

Exercise 32: Is Your Fundraiser Worth It?

Fundraising events and activities can be a great way to raise money for your club. But far from being "free money," fundraisers usually require significant effort on the part of your club leadership and volunteer base. You might find that, once you add up the time and effort (and money) that your club members put in, a particular fundraiser really isn't worth it.

Use the questions below to evaluate each fundraising activity that your club organizes/participates in. These questions are not intended to give you an answer about whether a specific activity is worth your club's time, but rather to help you compile the information that you need to make a decision as a club. If you perform this exercise and question whether a specific fundraising activity is "worth it" ask yourself (or your Board/Executive) how you would replace the revenue that the activity produces before making any decisions to cancel it.

1. **Time Input**:
   a. How many total hours does it take to plan, execute, and administer the fundraising activity? Include the time it takes to complete all tasks related to the activity by all volunteers, no matter how small the task seems or how little time it takes to complete. Also include time that the Board/Executive takes to discuss the activity or time that is spent in brainstorming ideas.
   b. How many individuals are involved in planning, executing, and administrating the activity? Divide the total number from the previous question by the number of individuals involved. Does the average amount of time per individual seem to be reasonable to ask of people? Are there certain individuals putting in many hours over the average?
   c. How are the total hours distributed over the course of a year? Are they concentrated in a small period of time (e.g. a particular week or month? Are they spread out relatively evenly over multiple months? Does the distribution of hours make sense for the type of activity or is there a better way to distribute them?
   d. To put a dollar value on the amount of time that your club devotes to the fundraising activity (which is important for making valid comparisons), take the minimum wage in your area, multiply it by 2, and then multiply by the total number of hours. This multiplier represents the fact that individuals are using their free time to contribute to the volunteer activity. If your members contribute any professional services (i.e. things they do as part of their regular job) for free, use the rate they would charge a customer for the number of hours of professional services that they contribute. *Example: (20hrs reg. x ($11.45/hr x 2)) + (2hrs prof. x $35/hr) = $528*

2. **Effort Input**: List the most important tasks related to the fundraising activity in the table below. Score each task on a scale of 1-5 on a) how much effort is required to perform the task and b) how much enthusiasm your volunteers have to complete the task (i.e. how easy is it to get someone to sign up to do it?). A score of 1 equals no effort/enthusiasm. A score of 5 equals maximal effort/enthusiasm. Correlation between the scores for effort and enthusiasm should indicate that the task is "easy" for your club to execute while tasks that score high on effort and low on enthusiasm might indicate that the task is extremely draining for your volunteers. Average out the effort and enthusiasm scores for the tasks to get an idea of how the activity scores as a whole.

Task	Scoring					
	Effort:	1	2	3	4	5
	Enthusiasm:	1	2	3	4	5
	Effort:	1	2	3	4	5
	Enthusiasm:	1	2	3	4	5
	Effort:	1	2	3	4	5
	Enthusiasm:	1	2	3	4	5
	Effort:	1	2	3	4	5
	Enthusiasm:	1	2	3	4	5
	Effort:	1	2	3	4	5
	Enthusiasm:	1	2	3	4	5

3. **Revenues & Sources:** Evaluate the following financial aspects of the fundraising activity:

   a. What is your average net profit (revenues minus expenses) from the last three times you ran this fundraising activity? How does your net profit compare to the monetary value of your time input (from above)? What percentage of your club's annual budget does this represent?

   b. What percentage of the gross revenue (before expenses) for the fundraising event is provided by your own members through ticket sales, donations (monetary and otherwise, e.g. silent auction items, empty bottles, etc.), or spending at the event (e.g. bar sales)? How does this compare to your net profit for the activity? Can you find ways to lessen your dependency on existing club members for revenue?

c. What is your profit margin? Calculate this by dividing your net profit by the gross revenue (*Example: $2675 net profit divided by $5235 in gross revenue equals a profit margin of 51%*.). How does your profit margin compare to the amount of time and effort that your volunteers put into planning and executing the activity (i.e. are you putting a lot of time and effort - and cash flow - into something that makes you relatively little money?)?

Exercise 33: Building a Sponsor Package

Sponsorship is a fairly stable source of revenue for a club provided that relationships are managed effectively. What underlies a strong sponsor relationship is mutual value; obtaining sponsorships is achieved through demonstrating the value the club can provide to the sponsor and keeping sponsorships is achieved through consistent fulfillment of this promise. How you communicate the value that the club will provide will increase your club's chances of converting a sponsorship request into a contract.

In this exercise, we will review the characteristics that are present in a strong, professional sponsorship package that your club can use to gain sponsors, tips for creating specific sponsorship opportunities, and tips on how to pitch to a potential sponsor. Use the tips below to help you compile the elements necessary to build your own sponsorship package (a sample package will be included in the resources folder).

Characteristics of a Strong Sponsorship Package:

1. Professional presentation using graphic elements and images. Use professional-quality photos of the club and its activities to show the club in a positive light. Don't just focus on game photos; use photos from off-field activities as well. Use free software like Canva to get access to graphic elements and templates.
2. Use the first couple pages of the sponsorship package to outline the values of the sport and your club. Tell a story about the unique attributes of rugby and your club that sponsors may identify with. Help them understand who you and your club are and if their values align with your club's it is more likely that they will agree to be a sponsor.
3. Be clear about the opportunities that you are presenting, including the duration of the sponsorship (when the relationship will end), the value (per year and total), and the number of opportunities available. Be clear about the exact benefits that sponsors will receive, including metrics where possible (e.g. website traffic, attendees at the event, etc.).
4. Consider variable pricing options for multi-year sponsorship agreements, such as a cheaper per-year price for a multi-year deal versus a single-year deal. Remember to adjust sponsorship prices to account for inflation and changes to valuation; just because a sponsorship is worth $1000 in the first year of a contract doesn't mean that it will be worth that in the third year.
5. If you are promising sponsors that they will get logo recognition in a particular location, try to give sponsors a visual representation of how their logo will be displayed (for large sponsorship requests, try using the sponsor's actual logo rather than a "your logo here" graphic).
6. Include testimonials from past and current sponsors to make your case for you.

Creating Specific Sponsorship Opportunities:

1. Include demographic information about the individuals that will be exposed to the sponsor's information in your sponsorship package. When you present specific opportunities to potential sponsors, make sure to refine this demographic information for the specific opportunity (e.g. the potential audience for the sponsor's information may be very different on your club's website versus on a sign at the clubhouse).

2. Itemize the properties (the thing that you are going to put the sponsor's name/logo on or the intangible benefit that they will receive) that your club can sell to a sponsor and the approximate value of each opportunity (use a professional agency such as Sport Law & Strategy Group if necessary). Your valuation of your property should include the cost of production/fulfillment (e.g. if producing an item with a logo), the placement or the sponsorship, the size of the anticipated audience, the duration of the exposure, among other things. Remember that valuation should reflect the value to the sponsor, not the value to the club. Some common properties that clubs could offer to sponsors include: logo on jerseys or club merchandise, naming rights to club events/youth programs, logos and information on websites, on-site promotion at clubhouse, reduced/complimentary social membership, or clubhouse "membership" (i.e. monthly account at bar/restaurant).

3. Combine properties on your itemized list to create attractive opportunities for sponsors. Ensure that the properties that you combine make sense to the potential sponsor and do not become excessively expensive for the target businesses (e.g. while selling a "total club" sponsorship where the sponsor gets a piece of every property the club can offer may sound good, the combined values of all the offered properties may represent more than a single business can contribute). These are the opportunities that you will advertise in a sponsorship package.

Presenting Your Sponsorship Package:

1. Make sure you are talking to the right individual in the target organization. If you are unsure, ask the business who the best person to talk to is. Don't waste your time and effort presenting to the wrong person.

2. Use language that emphasizes the relationship between the business and the club as a partnership rather than a sponsorship. A sponsorship is not a donation. It is an exchange of value and the way you present the sponsorship opportunity should reflect that.

3. Spend time discussing values, do not jump directly into specific sponsorship opportunities. Make sure to do research on the potential sponsor's business (particularly any publicly available mission, vision, or values statements) before presenting.

4. Draw the potential sponsor's attention to opportunities that you feel will be a good fit for them. However, do not insist on your pre-selected opportunities to the exclusion of others (particularly if the potential sponsor shows interest in something else).
5. Be flexible on the contents of the opportunities that you are presenting. Be willing to swap benefits and adjust valuations accordingly if the original properties that you are presenting don't appeal to the potential sponsor. This can be a win-win for you and the sponsor (since you can sell any unwanted properties to another sponsor).

Exercise 34: Event Planning Timelines

As everyone has likely experienced, just saying that your club is going to host a fundraising or social event does not will said event into existence. There are tasks to be performed and timelines to be adhered to in order to host a successful event. In a volunteer environment, it can be difficult to keep everything organized and on track, especially if your event has many moving parts.

To help you keep your events on track, use the chart below to create timelines and assign responsibilities for one of your club's fundraising or social events. We have included many common tasks for club events but feel free to use the blank space provided to add any specific tasks that are not included (since all events are unique). Repeat this exercise with all of your club's events and keep them on file for future reference (even just as a starting point for planning the same event in subsequent years).

Event Name: _____   Event Date: _____

Task	Recommendation	Assignee	Your Timeline
Determine event date	Set a target date at the start of the year and confirm as soon as possible		
Book event venue	As soon as possible after date is chosen (possibly in conjunction with above depending on venue availability)		
Secure any presenters/ entertainers required	In conjunction with determining date and venue, even if the presenters are club members (do not assume that the individuals you require will be available)		
Secure any required vendors (e.g. catering, A/V equipment, etc.)	Immediately after securing event venue (or in conjunction if using venue-provided services); ensure that vendors are available for your chosen date and can work with the chosen venue		
Obtain additional insurance (if required)	Immediately after securing the event venue; the necessity of additional insurance will be determined by the venue and the type of activities that are planned		
Obtain liquor license (if necessary)	Apply for the license immediately after securing the venue; this may not be required if a) the venue has their own liquor license or b) no alcohol will be served		
Create communication materials for event	Begin creating these materials once key info is confirmed (i.e. date, time, location, cost); complete them at least one week prior to the beginning of promotions		
Confirm volunteers	Secure your volunteer workforce before		

for the event	promoting the event publicly; this will give you time to do any required training and avoid confusion over ticket purchases and refunds		
Begin event promotion and ticket sales	At least 3 weeks prior to the event date, longer for larger events where attendees may need to make travel arrangements (6 weeks) or members are expected to raise interest in the non-rugby community (4 weeks)		
Finalize any outstanding details with venue and vendors (e.g. menu, A/V schedule, etc.)	One week prior to the event date to allow for the possibility of last minute adjustments; any contracts with your venue or vendors may have a specified timeline for finalizing details that would supercede this recommendation		
Obtain physical objects required for event (e.g. props, printed materials, alcohol, etc.)	One week prior to the event as volunteer capability and storage allows; leaving acquiring all of these objects to the last minute almost guarantees that something will be forgotten		
"Last call" for ticket sales	Two days prior to the event to allow individuals to take action and purchase tickets; don't post a "last call" only hours before closing ticket sales		
Event day tasks	Day of event; if the event requires a lot of setup try to accomplish this early enough in the day to allow volunteers to recharge before the event		