



Team Managers Guide

Planning and Administration



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Planning and Administration

Why plan?

Failing to plan is planning to fail. Planning is an essential part of your role as a team manager, a characteristic of a successful team manager is that they plan for all the foreseeable scenarios, and know when to alter their plan as circumstances change. A plan is simply a list of steps that details how to achieve a goal. This guide has been developed to assist you in your overall planning.

Goal Setting

Planning doesn't work if you don't know where you're going, so as a team manager you will need to set some goals. Here are some things to consider when setting your goals:

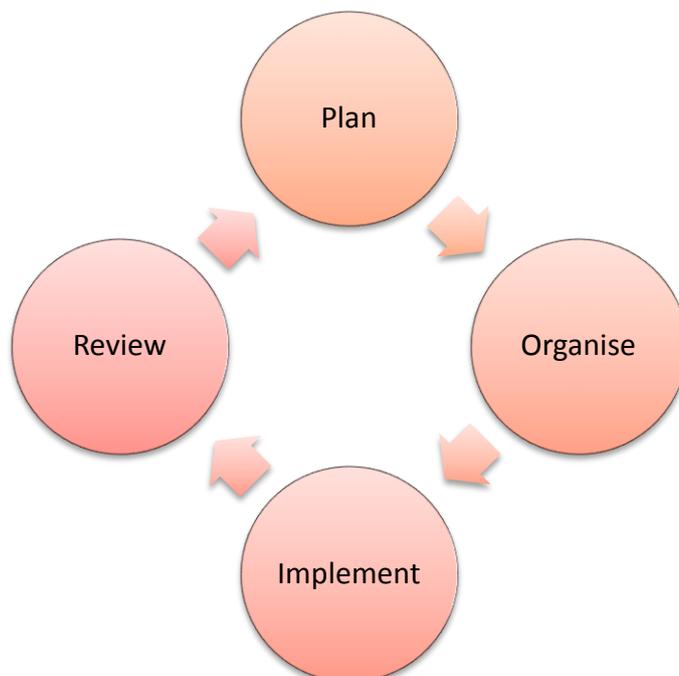
- the performance goals of the team will be set by the team coach and athletes
- your own goals will concern providing the environment for the team to achieve their performance goals
- SMART (specific, measurable, achievable, and realistic, timeframe) goal setting process is a good tool to use
- consult with the coach and the team to ensure your goals meet expectations and are complementary.

Project Planning

A project is a sequence of activities that must be completed by a specific time and within a budget. Unlike business plans, a project has a finish date. Sport competitions can be considered to be a type of project plan. The unique feature of events is that the close down date is fixed: the event's date is generally not changed. This makes planning for events more crucial, and as the event date approaches, there is likely to be increased pressure to complete the necessary arrangements.

The planning cycle

The easiest way to structure your plan is to think of the team lifecycle of pre-event, during the event and post-event. This can also be considered with the planning cycle in the picture below. Planning and organising occur pre-event, implementation is the event itself, and the review is the post-event stage.



Structuring your plan

Plans need to be broken down into smaller 'chunks' so that all of the details are included within a larger structure.

The plan can be structured in two ways: using the **event life cycle** (i.e. pre-event, event and post-event), or by breaking the plan into **different sections** (such as entries, uniforms, funding)

Use what works best for you. You might find you have a lot of duplication of subheadings if you use the first method, because you'll need to consider each section before, during and after the event.

For a competition without travel, the sections in your plan might include:

- finance; including funding, sponsorship and fundraising
- uniforms
- equipment
- transport
- catering and nutrition

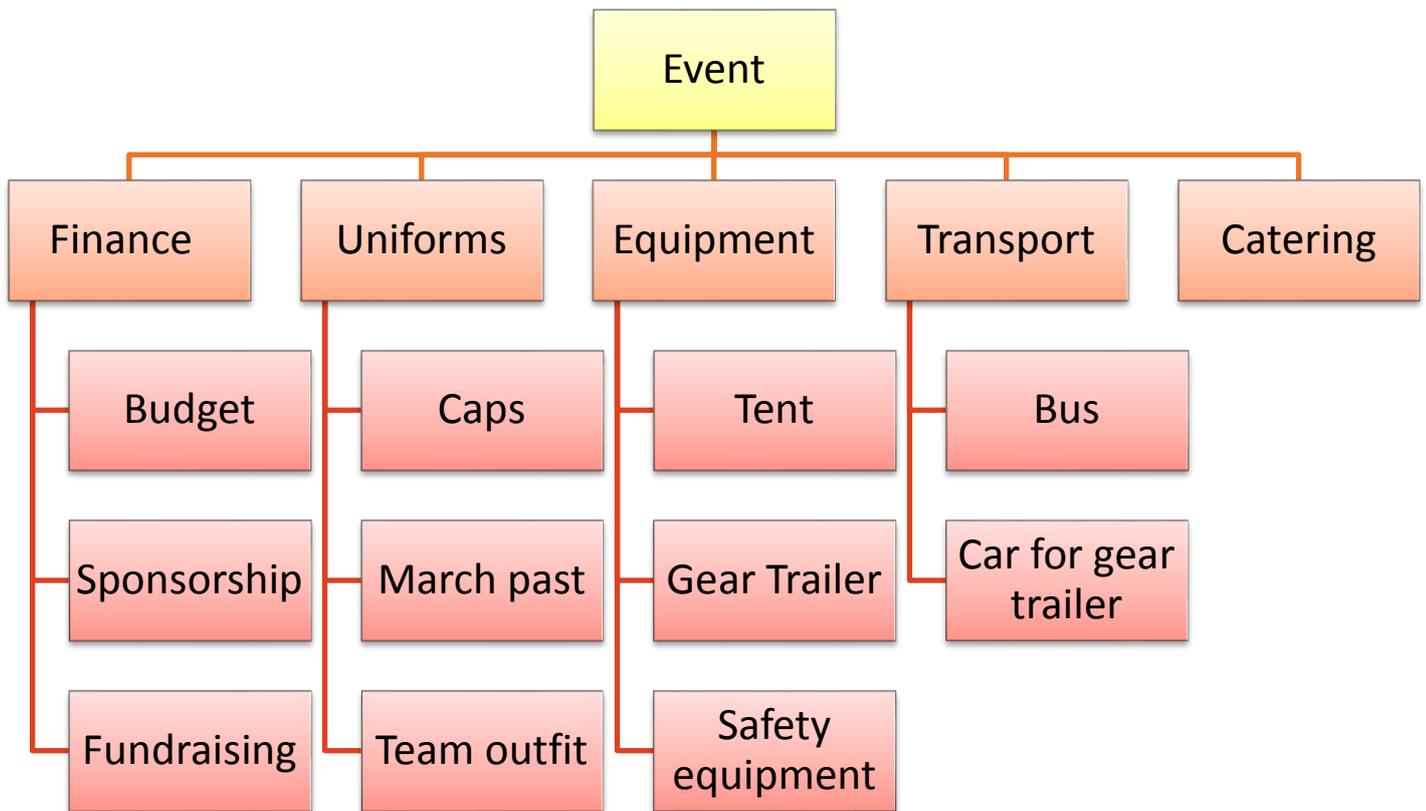
Planning considerations

Regardless of how you decide to structure your plan, there are a number of areas that should be considered when developing a plan.

Considerations	
Entries	<p>Each competition has a separate entry circular that will clearly identify the following:</p> <ul style="list-style-type: none">• process of entries• when entries are open• when they close• the cost to enter the competition. <p>SLSA uses the carnival manager system for all national events to manage the online entries. You as the team manager have the responsibility to ensure that all members are entered into the competition.</p> <p>For information regarding the carnival manager and how to use it can be found here.</p> <p>Be aware of SLSA's policy on Proficiency and Patrol Hour Requirements for Competition Eligibility, and the policy on Competitive Rights and Transfers.</p>
Determining the team	<p>At the start of the season, determine who is likely to be part of the team. Some clubs include parents and supporters in this list. Check if this applies for your club.</p> <p>There are a number of ways that you can determine this list:</p> <ul style="list-style-type: none">• put a notice and competition dates on club noticeboard• have an information session• use email, club website and social networking• check with club coaches• get all interested parties to complete a registration of interest form outlining which carnivals they wish attend at the beginning of the season.
Uniforms	<p>Check with club committee about sponsorship commitments for club uniforms.</p> <p>Broad consultation is recommended to ensure uniforms expectations are met (as well as practicable).</p> <p>Have an inventory of club caps and team vests that are borrowed by team members.</p> <p>Ensure you are familiar with the SLSA Sponsorship Policy, and the General Competitive Conditions in the Surf Sports Manual.</p>
Travel & accommodation	<p>With a rough estimate of the team sizes for each event, you are able to plan for travel and accommodation (if applicable). Consider who you are booking for and the distance between accommodation and the competition and if you will need subsequent travel arrangements if it isn't walking distance.</p> <p>Before making any bookings, you require permission to commit expenditure from the club.</p> <p>Keeps a complete list of the team (including supporters), with methods of travel, time of arrival and contact details.</p>
Team profiles	<p>Athletes travelling with the team should sign an athlete agreement. Parental consent forms need to be collected for all members under 18.</p> <p>A full profile should be collected for both athletes and team supporters. These should include:</p> <ul style="list-style-type: none">• name, address, phone, email, emergency contact• medical details, Medicare number, allergies, existing health conditions• clothing sizes for uniforms• catering requests• photography permission as per the SLSA photography policy.

Equipment	You might have responsibility for a large range of equipment and in terms of what to bring, it never hurts to follow the boy scouts motto of being prepared. Equipment is a ubiquitous term that can extend from bungs for skis to gear trailers full of equipment. Larger teams may have a gear steward, but in smaller teams this responsibility will fall to the team manager.
Catering	At smaller events, athletes are usually responsible for providing their own food and drinks. However, team managers may need to arrange snacks and fluids for larger events. Planning for this should include consultation with the club coach to ensure suitable provisions. You should ensure they are mindful of allergies when planning club catering.
Finance	Some clubs have fundraising committees to assist with touring teams, while other clubs may subsidise or have a user pays system. Team managers need to determine the funding model and consider this when planning and budgeting for each event. Team managers will need to ensure all funds are accounted for with invoices.

A suggested planning structure might look like this



Planning for contingencies

A contingency is an occurrence that is possible, but not certain.

A good team manager has plans to address these situations, which can allow them to maintain a positive competitive environment for their team.

For example, consider what you would do if:

- your team tent and other equipment was lost or damaged
- there is an incident concerning a team member that attracts disciplinary measures
- a team member puts inappropriate content on social media?

Developing your plan

Take the time to draw an overview of your plan:

- work out the major area
- place more details under each work area
- task can be then placed under each of these sections
- it is easiest to place these into a spreadsheet, to allow for easy sorting by section, due date or responsibility.

	A	B	C	D	E	F
1	Project	Sub Category	Task	Due date	Responsibility	Status
2	Finance	Budget	Determine income	12 weeks prior	Team Manager	
3	Finance	Budget	Budget expenditure	12 weeks prior	Team Manager	
4	Finance	Budget	Check budget with team management	12 weeks prior	Team Manager	
5	Finance	Budget	Send budget to club executive for approval	12 weeks prior	Team Manager	
6	Finance	Budget	Monitor actual expenditure before event	1 week prior	Team Manager	
7	Finance	Budget	Monitor actual expenditure after event	At event	Team Manager	
8	Finance	Budget	Prepare final budget acquital for club executive	2 weeks post event	Team Manager	

Budgeting

Once the plan has been developed and signed off by the club executive/president or your direct reporting line it is easier to see which items need budgeting. It is essential that a budget be put together and agreed with the club committee; these arrangements need to be made as soon as possible. It is best if you meet with the club treasurer to ascertain how financial records and expenses are to be accounted for to meet the necessary accounting practices and compliance reports.

In terms of your budget, there are two kinds of costs: **fixed** and **variable** costs.

Fixed costs stay the same regardless of your team size, for example the cost of designing a club shirt. **Variable** costs are dependent on the number of people, such as the number of shirts that will be ordered or catering arrangements.

It is important to ensure there is accountability and the keeping of accurate financial records.

Some clubs have a fund raising committee to assist with costs for the touring teams, while others fully or part subsidise, or have a user pay system. It is essential you discuss this with the relevant club committee as clubs have a responsibility to set out how spending of funds is to be allocated.

Purchasing

Clubs usually allocate team managers a supply of petty cash. Ensure that receipts and invoices are accounted for according to club policy.

Some clubs issue supermarket vouchers to team managers for the purchase of fuel and groceries. These also require to be accounted at the end of a tour.

Sponsorship

Sponsorship is often a good way to raise funds or in-kind support and is successfully brought about by having or creating a good relationship with the business that you are approaching. Be aware of any other sponsorship relationships that the club may be committed to; and that the obligations of any sponsorship need to be delivered by the team.

Before approaching a sponsor or a number of sponsors always ensure you are clear on what you asking for and how you will deliver on the arrangements. Always follow up with sponsors as to how well the team went and the highlights of the team achievements and the benefit the sponsorship delivered to this outcome.

Ensure you are familiar with the [SLSA Sponsorship Policy](#). Team managers should also consider that their state, branch and your club also might have their own requirements that could apply.

Ensure there are no conflicting sponsorship arrangements within the team, as per [SLSA's Competition Sponsorship policy](#).

Fundraising

There are numerous ways to raise funds, including quiz nights, sausage sizzles, selling chocolates and raffles etc. Clubs have found the most innovative ways for fund raising and provided they are not at odds with SLSA policies or create legal issues it is a good opportunity to build commitment and team spirit. The internet and other organisations are a good source of ideas to raise funds.

Evaluation and Reporting

It is important to debrief at the end of every competition and the end of the season. The formality and size of the event will dictate the review accordingly. However, even a day trip carnival should be evaluated and reviewed. All post-event evaluations should be collated into a report, for circulation and to provide an official record of proceedings. The report should include recommendations for the next event or season. These can serve as a reminder to the team manager in subsequent seasons or as an induction for a new team manager or management staff.

Issues and incidents

Regardless of the size of the surf sport event, any issues or incidents should be recorded for future reference.

Travelling team report

The contents of the travelling team report will vary according to the length of the trip. The travelling team report should include:

- accommodation report
- support team report and recommendations
- discipline issues (positives and negatives)
- medical issues
- financial report (budgeted versus actual)
- photos
- media and social media report.

Thank you letters

Although a very small part of competition, thanking people who have helped you as the team manager or the team along the way can go a long way. You can be as creative as you like with the thank you letter; a card, a letter from the club, a picture of the team with a message on the back or even a plaque. Some people you might consider (but are not limited to) thanking:

- sponsors
- accommodation provider
- support team
- the club president.

Tools for reporting and evaluating performance

Tools for reporting and evaluating performance	
After action review	This style of evaluating has four simple steps: <ul style="list-style-type: none">• What was planned?• What really happened?• Why did it happen• What can we do?
Five finger storytelling	This process is best used informally with team members in a circle, with each person outlining their five things: <ul style="list-style-type: none">• Little finger: what parts of the effort did not get enough attention• Ring finger: what relationships were formed, what you learned about relationship building• Middle finger: what you disliked, what/who made you frustrated• Pointer finger: what you would do better next time around, what you want to tell those who were 'in charge' about what they could do better• Thumb: what you liked, what was good.
Team Survey	This can be done using survey monkey. Anonymous survey is a good way to get honest feedback from team members.

Self-evaluation and reflection	<p>It is important for team managers to conduct a self-evaluation of the way the team was organised and if the planning and execution of the plan could be improved in the future. This process can be carried out using the self-reflection process similar to the one that athletes use to assess their own strengths and weaknesses. Self-reflection is simply a process of evaluating your own performance and identifying areas requiring improvement and initiating strategies to develop skills to improve the quality of your performance.</p> <p>For effective self-reflection it must be carried out on a regular basis and strategies for improvement implemented for the full benefits of this process.</p> <p>Self-Reflection is a four step cyclic process:</p> <ul style="list-style-type: none"> • evaluating performance • identifying areas of improvement • implementing strategies for improvement • evaluating implemented strategy performance.
360 degree feedback	<p>Self-reflection can be supplemented with feedback of your performance from the club, team management or athletes. This can be a confronting and sensitive process. If team managers undertake this process, they may be prepared to possibly hear some things they may not initially like the sound of. If you use this process, be sure to structure questions that allow you to get to the <i>why</i> of any issue, and also <i>what</i> can be done to address issues and improve performance.</p>
Team managers diary	<p>While it might not be for public consumption, it can be useful to keep a diary while on tour to help remember insights and ideas for future reference.</p>
Team debrief	<p>As well as getting feedback and information for reporting processes, it is important for you to recognise the achievements of the team (both in and out of competition) and give the process a sense of closure. You should also be aware of 'post tour depression', where members (themselves included) have difficulty settling after the hectic pace and the camaraderie of the touring team environment.</p>