

# Club Planning & Operations Resource Sheet

The Club Planning and Operation Resource and Checklist are tools that can be used to assist with planning and day-to-day operations within your club. These resources are based on a standard winter season with a spring fiscal year end for the club; however, they may be adapted to suit the individual programming needs of your club. Resources and links are provided throughout this document.

## Post-Season – Reflect and Update *(after skating and/or the club's fiscal year end)*

### 1. Distribute customer/member survey

- It is important to seek out feedback from the membership regarding the skating season. This will help in planning for the next season.

SKATE CANADA SAMPLE  
CUSTOMER  
SATISFACTION SURVEY

### 2. Plan/host Annual General Meeting (AGM)

- Every club is required to hold an annual member meeting
- The club presents reports and summarizes the skating year at the AGM
- An election or acclamation for the Board of Directors also happens during the AGM
- Be sure to hold meetings and elections/acclamations as per the timelines and process requirements set out in your club by-laws

\*Resources and a webinar on proper procedures for an AGM will be available in March/April of 2020

### 3. Register and update Board of Directors on Skate Canada Membership Site

- Once the AGM is completed, the club administrator will need to register any new board members with Skate Canada and update the Board of Directors list for the club

SKATE CANADA  
MEMBERSHIP  
SITE

### 4. Update Board of Directors or Address Change with the Ontario Government

- \*this step is required if your club is incorporated within Ontario
- If there is a change to the Board of Directors or address of the club after the AGM, the club must submit these changes to the Government of Ontario within 15 days of the change

GENERAL INFORMATION  
FROM THE ONTARIO  
GOVERNMENT

GOVERNMENT FORM  
TO FILL OUT FOR ANY  
CHANGES

### 5. Schedule yearly planning meeting

- Schedule this meeting during the off-season with the entire Board of Directors
- Yearly planning meeting should focus on developing the upcoming season for the club

## Off-Season - Planning

### 1. Hold yearly planning meeting

- During this meeting, clubs will plan and budget for the next season. Yearly planning can be spread out over a couple meetings as this process will entail many tasks and a great deal of detailed information.
- Topics to include are:

#### a) *Board Orientation - review By-laws, Policies/Procedures and Board Roles and Responsibilities*

- Orientation is especially important for new board members to ensure they know the club's management procedures and policies
- Reviewing board roles helps to keep roles fresh and reiterates the responsibilities for each member. Doing a review can be a great introduction for new board members to become familiar with different roles.
- Consider redistributing job tasks or adding training for those taking on new positions.
- If amendments are required, the proper procedure should be outlined in the by-laws and will guide the interim process. These amendments need to be ratified by the membership at the next AGM.
- If the club is missing a policy, the Board can develop and implement one for the club.
  - Some recommended policies for clubs:
    - ◇ Code of Conduct (athlete, parent, board, coach)
    - ◇ Conflict of Interest for Board
    - ◇ Complaint
    - ◇ Dispute Resolution
    - ◇ Disciplinary
    - ◇ Concussion
    - ◇ Screening (volunteer)

\*Resources will be available throughout 2020 for creation and adoption of policies

#### b) *Review customer survey*

- Valuable information that will help with member retention and membership growth can be found through the analysis of surveys.

#### c) *Review membership numbers and community demographics*

- Are there ways you can optimize club programming for changes in the community?
- Consider:
  - changes in the size of the community
  - skaters finishing high school and moving away for school (or say graduating skaters,.....)
  - availability of programs in the community

#### d) *Set goals and priorities*

- Setting goals and priorities provides clubs with guidance and direction in planning, motivates progress and assists in evaluating yearly performance.
- Use SMART goals to increase your chance of success by ensuring clarity, focus and optimal productivity.

SMART  
GOALS  
RESOURCE

SMART  
GOALS  
DETAIL  
SHEET

SMART  
GOALS  
WORKSHEET

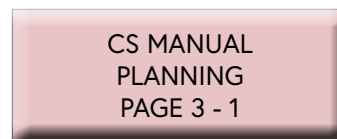
**e) Set budget(s)**

- Setting a financial plan for the season will help your club manage money in the present and plan for future seasons.
- Consider:
  - facility rental (ice/rooms)
  - coaching and staff
  - administrative costs (online registration, credit card fees, office supplies, extra insurance, club room rental)
  - registration/program fees income
  - fundraising/sponsorship income

\*Resources and a webinar on club finances will be available in March/April of 2020

**f) Set program schedule**

- Setting a program schedule is a great chance for your club to optimize programming for your members. Are there possibilities of adding more ice time? Are there ways to save money and increase engagement by maximizing group time, combining sessions and using more off-ice training?
- Consider current ice allocation, club goals, options to maximize program effectiveness, and changes in membership.



← \*will need to sign-in to Members site

**g) Determine staffing needs for next season**

- Have coaching needs changed? Could the club afford a part-time administrative assistant?
- Consider the coach/skater ratio, programming and/or technical coordinators, and administrative duties
- If there is a need for additional coaches or staff, you will need to advertise the available positions. Determine where advertising should go:
  - bulletin board, local newspaper, social media, club website, Skate Ontario job board, Skate Canada job board
- Ensure that you have enough lead time for reviewing applications, interviews and negotiations prior to the desired start date
- Given that coaches may be coaching/applying at multiple clubs, ensure that job positions are posted to allow sufficient time to attract quality candidates who have opportunities in their schedule

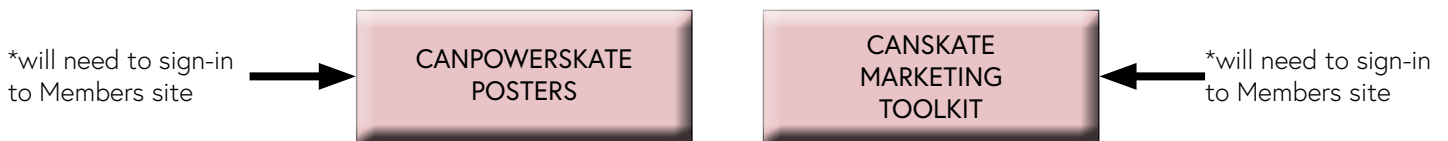


**h) Plan registration**

- It is important to set timelines for registration
- Consider in-person and/or online registration (include locations, dates and times)
- Be sure to include Rowan's Law acknowledgment forms for all registered members (parents if minor) under the age of 26

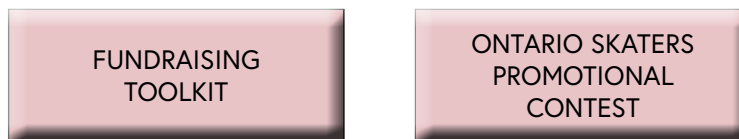
**i) Plan and execute marketing strategy**

- Where will you advertise?
- Who is your target market?
- Try to focus on a specific audience rather than the "general public"
- Consider multiple marketing tools including social media, club website, local media outlets, local events, flyers, and email communications
- Implementing a marketing strategy can greatly increase membership numbers



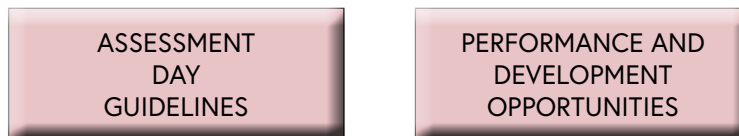
**j) Plan fundraising opportunities**

- For fundraisers, determine
  - Type
  - Time of year
  - Goal (in terms of dollar amount)
  - Volunteer need (if any)



**k) Plan assessment days, events and development opportunities throughout the season**

- Identifying all the important dates on your club calendar will help keep your membership apprised of what to look forward to during the season
- Consider competition, community event dates and holidays in your planning
- Special days to include: Assessment (test) days, family skates, bring-a-friend days, Performance and Development Opportunities, ice shows, theme and fun days, special recognition events, etc.



**l) Plan program assistant training**

- Set dates for initial training, recurrent and follow-up/mentoring plan
- Be sure to include a promotion plan to engage your membership
  - Target older skaters at the club or hockey players who need to get community service hours for high school

CANSKATE  
GUIDE

PROGRAM  
ASSISTANT  
MATERIALS

\*will need to sign-in  
to Members site

**m) Plan volunteer recruitment strategy**

- *Volunteers are integral to club operations. How will you engage and recruit volunteers for the season?*
- *Determine when and where volunteers are needed and develop postings for those opportunities.*

\*Volunteer Guide and webinar to be available by December 2019

**n) Devise a communication plan**

- *It is important to plan when you will communicate with members. How will you keep members informed?*
- *Consider parent meetings, newsletters, social media, text services, bulletin boards, information tables, etc.*

STAR 1 - 5  
COMMUNICATION  
AND TOOLS

CANSKATE MANUAL -  
PARENT INFORMATION  
SESSIONS, PAGE 3 - 17

\*will need to sign-in  
to Members site

**o) Update Skate Ontario club page and mailing list information**

- *Each Skate Ontario club has the option to have their own webpage on the Skate Ontario website*
- *Create or update your information to ensure prospective skaters/parents see the most up-to-date information for the club to maximize membership reach*
- *Are your members signed up to receive information from the Skate Ontario mailing list? We advise your club to add board members and any other interested parties in receiving information from Skate Ontario to ensure they are staying current with what is happening in the Section and at Skate Canada.*

UPDATE  
CLUB WEBPAGE  
INFORMATION

NEWSLETTER  
SIGN-UP

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of page

**p) Coach contracts**

- *After posting job opportunities, it is at the discretion of the Board (or designated committee) to review and interview perspective coaches.*
  - *this also applies to returning coaches*
- *Check perspective coaching staff's status with Skate Canada to ensure they are in "good standing" with Skate Canada and can coach at your club*
- *Clubs should draft a coach contract, have a meeting with the coach to present expectations, review the contract, and have contracts signed.*

\*Club/coach relationship resources will be available June 2020

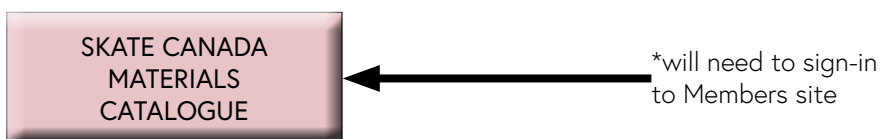
HOW TO CHECK COACH  
IN GOOD STANDING  
DOCUMENT

SKATE CANADA  
MEMBERSHIP  
SITE

\*will need to sign-in  
to Members site

q) Order supplies

- Supplies for the season can be ordered through Skate Canada.
- Items to consider ordering:
  - ribbons/badges
  - office supplies
  - teaching aids
  - skater incentives



## Pre-Season – Preparation

### 1. Host registration for programs

- In-person vs online registrations
- Ensuring compliance with Rowan's Law legislation

### 2. Register the club with Skate Canada

- September 1st is the renewal date for registration
- be sure to update insurance policy(ies) with Skate Canada
- update any club detail changes
- identify administrators and purchasers



### 3. Register members with Skate Canada

- September 1st is the renewal date for registration
- members must be registered before they step on the ice to skate
- also remember to register your synchro teams at this time
- register Board members for the year at this time



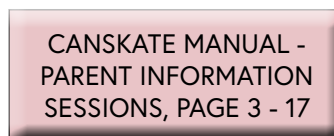
### 4. Check the status of the coaching staff with Skate Canada

- Check Skate Canada Membership site for coach eligibility status
- Coaches are required to be in "good standing" to teach during club ice time



### 5. Plan first week(s) of skating

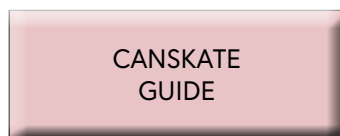
- Ideas to implement during the initial weeks of skating:
  - parent meetings, info sheets, signage in the facility, scheduling volunteers



\*will need to sign-in to Members site

### 6. Run program assistant (PA) training

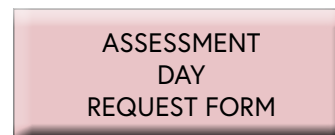
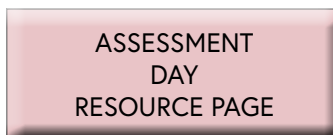
- Ensure you are providing PAs with the tools to successfully support club programs
- Think of potential incentives to recognize and retain PAs like providing them with club gear



\*will need to sign-in to Members site

### 7. Request assessment days

- Submit requests well in advance
- Requests must be submitted a minimum of 6-12 weeks before the requested dates
- A rough estimate of the assessments to be included in the day is required to determine the availability of evaluators
- Please contact [assessmentdays@skateontario.org](mailto:assessmentdays@skateontario.org) for questions



## In-Season/Monthly - Execution and Maintenance

### 1. Hold board meetings

- At minimum, the board needs to hold two (2) board meetings (not including the AGM) throughout the fiscal year
- In advance of the meeting, publish the date, time, location and agenda
- Within one (1) week, the minutes for the meeting should be prepared
  - Any member of the club can ask for a copy of the minutes for all board, special members and/or annual general meetings

### 2. Member communication

- It is vital to post and/or distribute important information to all members on a regular basis to keep them updated on happenings at the club
  - newsletters
  - email blasts
  - social media posts
  - club website posts
  - bulletin boards at facilities

### 3. Input Assessment Summary sheets

- These can be submitted online through the Skate Canada Membership site or by mail

SUBMIT  
ASSESSMENT  
RESULTS

\*will need to sign-in  
to Members site

**4. Execute Volunteer Recruitment plan**

- Event/opportunity specific plan

**5. Execute Fundraising/Sponsorship plan**

- Event/opportunity specific plan
- Keep membership up-to-date on progress

**6. Check supplies**

- Ensure there are adequate supplies throughout the season and reorder when necessary

SKATE CANADA  
MATERIALS  
CATALOGUE

\*will need to sign-in  
to Members site