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Strategic Planning

In Athletic Management

Planning for the Future

Do you ever feel like circling the wagons and doubling the night watch? What happened to the "good old days" in college athletics? They are gone forever!! The key now is adaptation to change. The planning process provides a structure for strategic thinking.

Many athletic departments are struggling to succeed. For some, survival is the name of the game. For sure, every university and college with athletic programs is looking for ways to adapt to a changing environment.

Good strategy must be turned into coordinated action. Taking a journey into the athletic world without a plan can be both hazardous and confusing. However, a well-developed, long-range strategic plan can provide the milestones by which progress can be judged and needed corrections made. The following is an outline of 10 steps to a strategic planning process designed to help focus on future growth. It helps an administrator concentrate on problems and long-term solutions.

Any athletic department can learn to plan for both the expected and the unexpected by implementing a strategic planning and management process that includes the following:

1. Preparing a statement of purpose: summarizing what it does, where it does it, how and for whom.
2. Monitoring the environment in which it operates.
3. Realistically assessing its strengths and weaknesses.
4. Making assumptions about factors that affect it, but over which it has no control, e.g., demographics.
5. Establishing objectives tailored to the department's purpose.
6. Develop strategies to meet the objectives.
7. Making and implementing step-by-step, long- and short-term operating plans.
8. Evaluating performance to ensure objectives are being met. Make sure the athletic program is being properly monitored and is in compliance with all laws and NCAA regulations.
9. Re-evaluating purpose, environment, strengths, weaknesses and assumptions before setting objectives for the next performance year.
10. Rewarding performance.

Statement of Purpose

The first step is to define the athletic department's purpose or reason for being. Underlying the purpose statement may be goals for revenue generated, attendance by sport, graduation rates, wins, championships, etc. All members of the athletic department have to understand and agree on the department's purpose. Otherwise, everyone will be pulling in different directions.

Monitoring the Environment

The plans and activities of athletic departments are influenced by a host of obvious environmental factors. However, less obvious external factors could throw the department off its planned course. Some examples of environmental factors facing athletics are changing legislation, a decline in bowl game TV ratings and conference reorganizations.

Assessing Strengths and Weaknesses

After identifying the purpose and scouting out the environment, it's time to assess the department's strengths and weaknesses. Some areas normally analyzed are buildings, facilities, computers, people skills, cash flow, etc.

**Good strategy
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Develop Assumptions

The fourth stage is to develop major assumptions. These should be made about spheres over which you have little or no control, i.e., factors external to your athletic department.

Setting Objectives

Any athletic department can ensure that it's moving in the right direction by establishing a set of clearly defined, measurable objectives. These objectives are the targets. They should be directed toward maximizing strengths and minimizing weaknesses.

By putting objectives down on paper and asking each employee to do the same, discussion can be generated that leads to a "performance contract," or a personal commitment to achieving those objectives, which should be reviewed and updated each month, if necessary.

It is a good idea to set objectives for the following:

1. Revenue by sport
2. Championships
3. Wins/losses
4. Graduation rate
5. Game attendance by sport
6. Budget
7. Community service

Creating Strategies

At this juncture, it is time to create the strategies to help reach the objectives. Objectives are the ends, strategies are the means.

Each strategy must be evaluated in light of current and prospective external factors—the department's strengths and weaknesses, changes in the marketplace and competition.

Developing Operational Plans

Once targets (or objectives) are set and strategies for meeting them outlined, it is time to develop both long- and short-term operating plans. Do not confuse objectives, strategy and the operational plan. The objective is the target. The strategy is the proposed means. The operating plan is the action phase. This is where the administrator hires, fires, builds, promotes and so on.

Financial Plan/Budgets

The effective use of financial resources is a cornerstone to a successful athletic operation. Every facet of the program must have a well-planned and realistic budget. An attempt must be made to live within the budget, although flexibility with changing circumstances is allowable.

A business and financial section should be set up and relied upon to insure proper control and reporting of expenditures. A tight-knit financial system will insure proper use of this important and necessary resource. Again, flexibility is the key, both for budget and control.

The yearly budget is set to meet the first year of the overall five-year plan. Each support unit/department develops a plan and the budget to execute it.

Monitoring Performance

The final step is to monitor performance to make sure that objectives are being met. Any deviations from expected results must be identified as quickly as possible and corrective action must be taken. Indeed, failure to achieve a stated target should not be overlooked, as this could lead to a breakdown in the overall plan.

It is important to ask these types of questions:

1. How far did actual performance hit or miss the mark?
2. Did attainment of the goals support the overall athletic department's purpose?
3. Has a change in the environment warranted changing the purpose, objectives and strategies?
4. Have additional strengths and/or weaknesses been revealed that require changes in plan?
5. Have athletic department employees been rewarded for achieving what they set out to do?
6. Is there room for providing people with feedback that will help them reach their goals?
7. If there is a failure to reach an objective, has the reason for failure been identified and corrected?
8. Is there a standard philosophy and procedure on how to handle problems?

Re-Evaluate

At the end of the performance year, and as part of planning for the next year, the purpose, environment, strengths, weaknesses and assumptions of the department must be evaluated.

Just having a plan does not ensure success. Only those athletic departments that continually evaluate their progress in a changing marketplace can survive. Preparing for the future requires a commitment to improving management practices now. This would be best done during the summer, off-site.

Reward Performance

Finally, reward performance. Use a system of bonuses. Pay for performance. Recent court rulings on equal pay make this an even more important topic for this decade. The University of Oklahoma recently approved bonuses equal to one month's pay for the football and baseball coaching staffs. What about a bonus system that includes wins, graduation rates, class attendance, etc.?

Team Work


This planning process promotes teamwork. Vince Lombardi was quoted as saying "a team needs to love each other". The same holds true for the athletic department "team". A staff retreat is a valuable experience.

Support Plans

After the overall athletic department strategic plan is developed and approved, then each major group develops a support plan. The support plan includes fund raising, football, baseball, etc. Also, included are plans for marketing and public relations.

Each support plan is presented to the entire athletic department staff and coaches. The key here is coordination and communication. There is a lack of coordination and communication in many athletic departments. The right hand does not know what the left hand is doing.

Conclusions

Why leave the success and survival of an athletic department to chance? A well thought-out plan with problems identified and a united course of action can help. It's no guarantee for success, but it can cut the chances of failure. 



Dr. R. Henry Migliore is a professor of strategic planning and management at Northeastern State University/University Center at Tulsa. He has worked as a consultant for many athletic departments, has written 11 books and hundreds of articles, hosted a cable television program, "Managing for Success", and occasionally writes columns for several Oklahoma newspapers. He holds degrees from Eastern Oklahoma State and St. Louis universities and completed his doctorate at the University of Arkansas.

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Planning Your Next Move

In the game of college athletics, every move an athletic director makes can be a boon or a bust. Here's how to use strategic planning to help direct each of those daily decisions.

By Dr. R. Henry Migliore, Dr. Deborah Yow, and Dr. William Bowden

As rapid change continues to be the norm in the world of college sports, many athletic departments are finding that survival entails more than year-to-year planning. Following the example set by business and industry over the past decade, "strategic planning" is becoming a must for every athletic director.

Strategic planning means finding successful responses to a changing environment. It entails understanding how college athletics will change in the near future, analyzing how your department can handle these changes, and implementing plans to conquer the future.

While the concept is not new (co-author Migliore has been writing and speaking about this topic to athletic administrators for the past five years and *Athletic Management* first broached the subject in its June/July 1995 issue), the exciting aspect of it is that university athletic departments are starting to find some creative methods of implementing strategic planning.

In this article, we will take a look at four steps of strategizing that will, hopefully, assist you in your own planning.

(Please see "10 Steps to a Strategy," at right, for a complete list of all points required for strategic planning.)

IN A STATEMENT

Often, the first step to strategic planning is defining your athletic department's statement of purpose. Most athletic departments have a short mission statement, but it is beneficial to go beyond that. Statements of purpose can be several pages long, and should encompass: the athletic department's role in the university, what its revenue goals are, its views on the role of both the coach and student-athlete, and any moral or ethical codes that may be relevant. Overall, it must convey the organizational values that the institution deems pertinent.

One university that has developed an excellent purpose statement is the University of Notre Dame. Please see page 20 for its text.

A few other points from the University of Notre Dame's "Statement of Intercollegiate Athletics" describe what is suggested in a purpose/mission statement:

1. *We are a University dedicated to the mission of providing the highest quality*

Ten Steps to a Strategy

The following ten steps are an athletic department's guide to implementing strategic management plans:

1. Prepare a statement of purpose.
2. Monitor the environment in which your particular athletic department operates.
3. Assess your department's strengths and weaknesses.
4. Develop assumptions about factors which affect your operations, but over which you have no control.
5. Establish objectives that are linked to your department's statement of purpose.
6. Develop strategies to meet those objectives.
7. Devise and implement short- and long-term plans.
8. Evaluate performance to ensure objectives are being met.
9. Re-evaluate your purpose, environment, strengths and weaknesses, and assumptions before setting objectives for the next year.
10. Reward performance.

education for all of our students.

2. Coaches are primarily teachers. They share with members of the faculty the

ity and increasing the desire of student-athletes to excel in the academic environment of TU. The program builds self-esteem and

Purpose Statement: University of Notre Dame

Notre Dame will endeavor to maintain a high quality, competitive athletic program consistent with its heritage. If and when problems arise, public accountability will be given consistently, with principles of justice and due process.

The total athletic program of the University will generate sufficient funds to be self-supporting. This should never be done to the detriment of the integrity of the institution or its identifiable priorities. There will be no booster clubs or other such entities outside of the direct control of the athletic department. The annual operating budget and the ongoing financial activities of the athletic department will be subject to the same review and approval process as are all other operating units of the University.

A full athletic program, consistent with the financial resources available, and the overall academic program of the University, will be provided for men and women student athletes.

Coaches and athletic department personnel will, as far as possible, reflect the racial, ethnic, and gender diversity of both the broader University community and society at large.

Non-varsity athletics will be provided sufficient support to enable every student to have the opportunity to participate in some form of organized athletic activity.

Conclusion: In sum, as an institution we will pursue a standard of achievement in athletics consistent with our overall purposes as a University. We will attempt to excel in every form of intercollegiate athletics, but not at the price of distorting our primary role as educators and moral guides. If we discover instances of misjudgment or abuse, we will strive speedily to rectify the situation.

We remain confident that Notre Dame and other institutions with similar values and goals can lead the way and shape a worthy standard for the special enterprise of intercollegiate athletics.

responsibility to educate and train the students entrusted to them.

3. The student-athlete is first of all a student. Each one is held to the same general standard of conduct as any other student.

Finally, as another example, the University of Maryland has also integrated into its comprehensive statement of purpose an explicit statement of its "operational culture." This focuses on the issues of accountability, productivity, creativity, and a spirit of cooperation and teamwork—where each employee views him- or herself as a service center to his or her internal and external customers.

Beyond the department's statement of purpose, it is a good idea for individual areas within the department to develop their own, less lengthy statements. Here are some examples:

The University of Tulsa Academic Support Program for Student-Athletes Mission Statement: The primary purpose of the program is to increase the graduation rate of student-athletes within the tenure of their athletic eligibility. This purpose is accomplished by improving the overall abil-

ity increases self-definition, self-responsibility, and self-motivation. It requires nothing less than full and active participation on the part of student-athletes, which invariably increases their level of academic and social maturity, thus having a positive effect on the rate of graduation.

The University of Oklahoma Athletic Development Area Mission/Purpose Statement: 1) To provide monies and resources for the overall Athletic Department plan. 2) To serve as one of the public relations arms of the athletic department. 3) To create a positive environment for our customers.

In Addition: Help provide money, resources, and enthusiasm for O.U. athletics. Cover gaps between ticket sales and needs. Support overall athletic department plan. Keep existing customers and create new ones. Create an environment where athletic development is efficient and fun. Interact with various segments of the athletic department and their constituency.

EXTERNAL FACTORS

The second, and an increasingly important, step to strategic planning

entails monitoring the environment. The plans and activities of an athletic department are influenced by a host of external factors. Some of the more obvious of these factors are:

- The incursion of professional sports franchises into collegiate sports target markets.

- The changing interpretations and stringency of application of Federal Title IX legislation. (At the University of Maryland, approximately three million dollars is being added to the athletic budget over a six-year period to implement fully Title IX compliance.)

- Conference issues such as revenue-sharing formulas, divisional competition patterns, postseason tournaments, or the possible addition of conference-mandated sports.

- The increasingly complex issues such as sports gambling, aggressive sports agents, substance abuse, and similarly difficult emerging trends.

- Intra-institutional issues such as the elevation of minimum GPA and/or test scores for entering special-admit students. This is occurring with considerable frequency as overall entering GPAs and test scores rise at many institutions.

Any one or more of the myriad of environmental factors can emerge, sometimes with surprisingly short notice, thereby greatly changing the conditions under which an athletic department functions. The key is to constantly monitor and assess the environment to best anticipate and plan for these exigencies.

The University of Maryland, for example, must deal with the dramatic impact of numerous professional sports franchises in its challenging market. Located in College Park, between Baltimore and Washington D.C., Maryland competes with 11 professional sports teams (with two more being considered) within a 35-minute drive of the campus. When the NFL Baltimore Ravens arrived into this already-saturated sports market, Maryland's response was to work with the Ravens instead of against them. The resulting plan is to schedule at least one football game each year in the Ravens' 70,000-seat stadium in Baltimore, which will both reach out to Maryland's large fan base there, and also develop an aggressive presence in the Baltimore market. In addition, the game scheduled to be played in Baltimore in 1998 vs. Georgia Tech will yield a guaranteed \$800,000 payday from the Maryland stadium authority in Baltimore.

Further, Maryland markets its 24 teams as, "The Best Value In Town," making them a family attraction, and pro-

vides outstanding customer service at every point in order to claim its share of one of the toughest sports markets in the nation. The results are very positive.

But whatever the set of environmental factors which may impact an athletic program, the key is to regularly analyze these issues in a way that facilitates sound, aggressive planning for these expected and unexpected factors. This is an integral step in the strategic planning process.

CONSTRUCTING OBJECTIVES

Another major point in strategic planning is setting objectives. The key here is to make goals specific, measurable, and attainable. In addition, objectives should be constructed in every area of operations.

For example, in the area of academics, you may set objectives of increasing the overall grade-point average of student-athletes from 2.2 to 2.5 and boosting the graduation rate by 10 percent. In game attendance, you may wish to increase football season-ticket sales by 5,000, women's basketball season-ticket sales by 1,000, and baseball season-ticket sales by 100.

In the area of sports information, an objective could be to increase the number of national media exposures by a specific, measurable amount; another might be to boost the local coverage of your women's volleyball team so that every home game is reported in the community paper. Other areas to consider setting goals for are: revenue by sport, championships, winning percentages, balancing budgets, and community service work.

As a more specific example, here are several of the objectives at the University of Maryland for 1997-98:

1. Maintain fiscal integrity by:
 - Balancing the annual expenses budget at \$27 million (which includes facility payments).
 - Making a \$500,000 payment on the accumulated operating debt accrued from 1984-1994.
 - Pay \$2.2 million of the remaining \$34 million facilities debt.
2. Maintain academic integrity in the following manner:
 - Continue to graduate student-athletes at a rate equal to or above that of the general student body using the NCAA graduation rate formula.
 - Keep the academic dismissal rate for 1997-98 at four percent or lower.
3. Maintain athletic excellence by finishing in the top 10 percent of all NCAA Division I competition as measured by Sears Directors' Cup points.

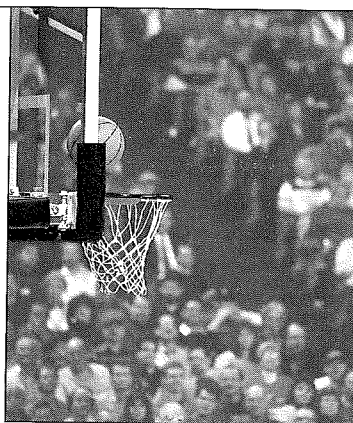
SUCCESSFUL STRATEGIES

The meat and potatoes of any management plan is developing the specific strategies to accomplish your objectives. To illustrate this step, we'll take an in-depth look at how to research and implement strategies in one area of operations: athletic marketing.

Marketing is one area that requires quite a bit of planning for it to be successful. Decisions in many areas—such as pricing, parking, concessions, event venue and time, and special promotions—must be made for every team.

The first step in this process is breaking down the potential market into segments. This will differ by institution, but here are several examples: alumni within a two-hour drive of campus; alumni who are long-distance; community members affiliated with the university (e.g., faculty, staff members); community members not affiliated with the university; students on campus; special groups (e.g., girl/boy scouts, YMCA youth basketball, local senior citizen club).

The next step is to decide the priority and profit potential of each market segment. The highest priority segments



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should receive the most attention, and a marketing plan can be developed for each.

The key here is identifying the customer in each segment. Our experience has been that many athletic departments make the mistake of assuming they know the customer and what the customer wants. However, it is unrealistic to make such an assumption; thus, marketing research should be conducted for each segment. Some combination of focus groups, phone surveys, and mailed questionnaires should be used. Here is an example of questions used by Oklahoma State University:

- How many football games have you attended this year?
- On a scale of 1 to 10, how have you enjoyed the games you have attended?
- What suggestions do you have to make the game-day experience more enjoyable?
- What do you do before a game? After a game? Would you like more pre- and postgame activities planned?

One of the most important aspects of this market research is to uncover any negative experiences your fans are encountering. For example, one university found that many of its fans were upset about new lights being installed at the football stadium—they assumed it meant the team's

schedule would switch primarily to night games. The lights were installed, however, for the occasional televised evening game, and the remedy for the disgruntled fans was easy: The next promotional message to season-ticket holders explained the purpose of the new lights and how they would affect the game schedule.

At another institution, marketing research uncovered the fact that local fans often decided not to attend a game because getting tickets the day of the event was too time-consuming. Those surveyed reported waiting in line one-half hour for tickets. In this case, the plan had to address and upgrade operation of the ticket sales window, along with publicizing how to obtain tickets via mail.

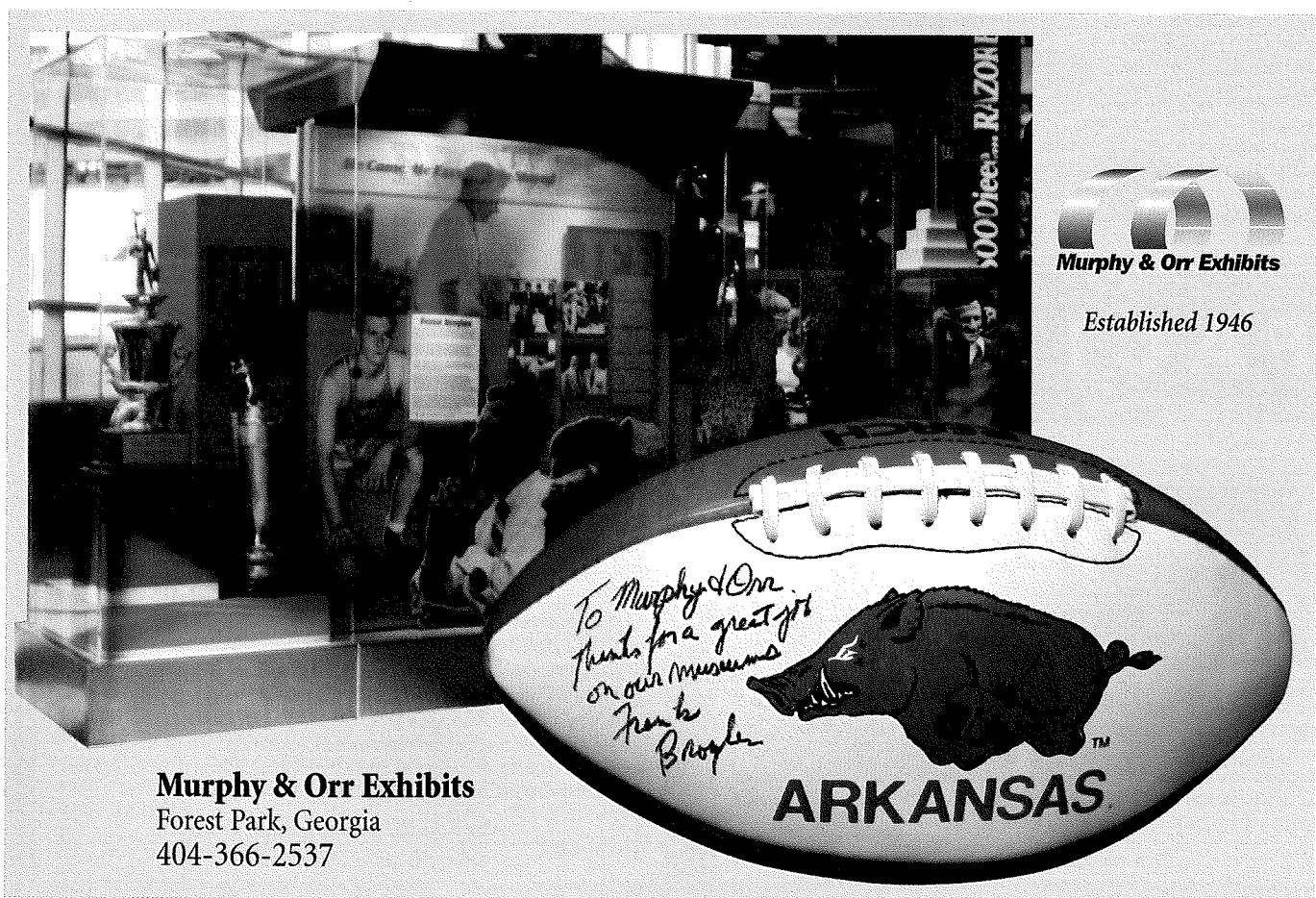
In addition to conducting research, it's important to recognize that marketing athletics is very different than it was 10 years ago. To the average consumer, sports are just another form of entertainment. Everyone in your total possible target market has a number of choices available at any given point in time. Every fall-football Saturday offers alternatives to attending the game such as golf, house/yard work, and children's activities, to name a few. Many different activities are all fighting for the same entertainment dollar, so the

sports marketer must clearly understand the desires of the market segments and create a positive cost/benefit entertainment package.

All this then leads to the development of specific strategies, which will vary from university to university, and often from sport to sport. In some instances, it can involve more grass-roots marketing, while other situations may require spending more dollars on advertising—the options are endless. A good marketer also recognizes that strategies should vary from year to year.

In every area of university athletics, strategic planning should be understood, embraced, and put into effect. No doubt, it does take extra time and effort, but the results can be impressive: It better ensures long-term success and survival, even as the changing world of sports rushes by. **DA**

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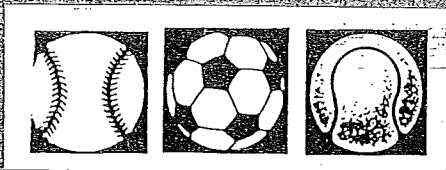
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Strategic Long Range Planning For Intercollegiate Athletic Programs

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More and more attention has been focused on the strategic planning process and the success surrounding such an approach. Intercollegiate athletic programs present a logical application target for strategic long range planning because of the necessity of the athletic administrator to be future focused in terms of acquiring, managing and allocating resources in a changing environment. Besides comprehending the type and style of management best suited for his/her particular organization (Keidel, '1985), today's athletic director faces a myriad of other areas that must be analyzed to facilitate accurate planning. These include: understanding his/her present internal/external environment and factors within his/her scope of control and those outside. Managing change, whether it be resource availability, personnel or a shift in goals and direction is essential to the success of athletic departments in the future. Skills in data collection and analysis as well as organizational communication and problem solving skills better prepare each athletic organization to

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survive the uncertainty that exists in the field. These considerations and concerns are now not only valid for the athletic director but also for the college or university president wishing to take an active role in order to remain informed regarding the athletic program. The degree of presidential involvement has been increasing over the last five years due to mismanagement and carelessness by some athletic directors. However, this involvement will only be effective and result in positive contributions in athletic administration if the presidents understand and are involved in the application of strategic planning principles to athletics. This article offers a strategic long range methodology that can be applied to any athletic department regardless of size or organizational mission.

Our definition of Strategic Long Range Planning and Management (SLRP&M) is a philosophy of management based upon identifying purpose, objectives, and desired results establishing a realistic program for obtaining these results, and evaluating the performance. The written plan then becomes the central theme of the direction and control of the athletic program. The nine steps in the process are:

1. Defining the purpose and reason for being of the athletic department.
2. Monitoring the environment in which the athletic department functions.
3. Realistically assessing the strengths and weaknesses of the athletic department.
4. Making assumptions about unpredictable future events that could have an impact upon the athletic department.
5. Prescribing written, specific, and measurable objectives in the principal result areas that contribute to the organizational purpose. This requires:

- a) negotiating and bargaining at every level from top management positions to staff.
 - b) recognizing a performance contract embracing the agreed upon objectives.
6. Developing strategies for allocation of resources to meet objectives.
 7. Designing long and short range plans to meet objectives.
 8. Constantly appraising performance to determine if it is keeping pace with the attainment of objectives and if it is consistent with defined purpose. This requires:
 - a) willingness to change or modify objectives, strategies and plans when conditions change.
 - b) evaluating progress at every stage so that needed changes can be effected smoothly.
 - c) making sure that rewards are thoughtfully considered and are appropriate for accomplishment. Recognizing the strengths and weaknesses of the extrinsic and intrinsic reward system.
 9. Reevaluating purpose, environment, strengths, weaknesses and assumptions before setting objectives for the next performance period.

The nine steps of the strategic planning process as illustrated in Figure 1-1 are important because they force the organization to consider certain questions. As each step requires the people at various organizational levels to discuss, study and negotiate, the process as a whole fosters a planning mentality. When the nine steps are complete, you have a product, a strategic plan. Managing in accordance with a strategic plan is an art. The longer you use the tool, the better you are able to manage. Also, and equally important is the process of involving people in the development and implementation of the plan.

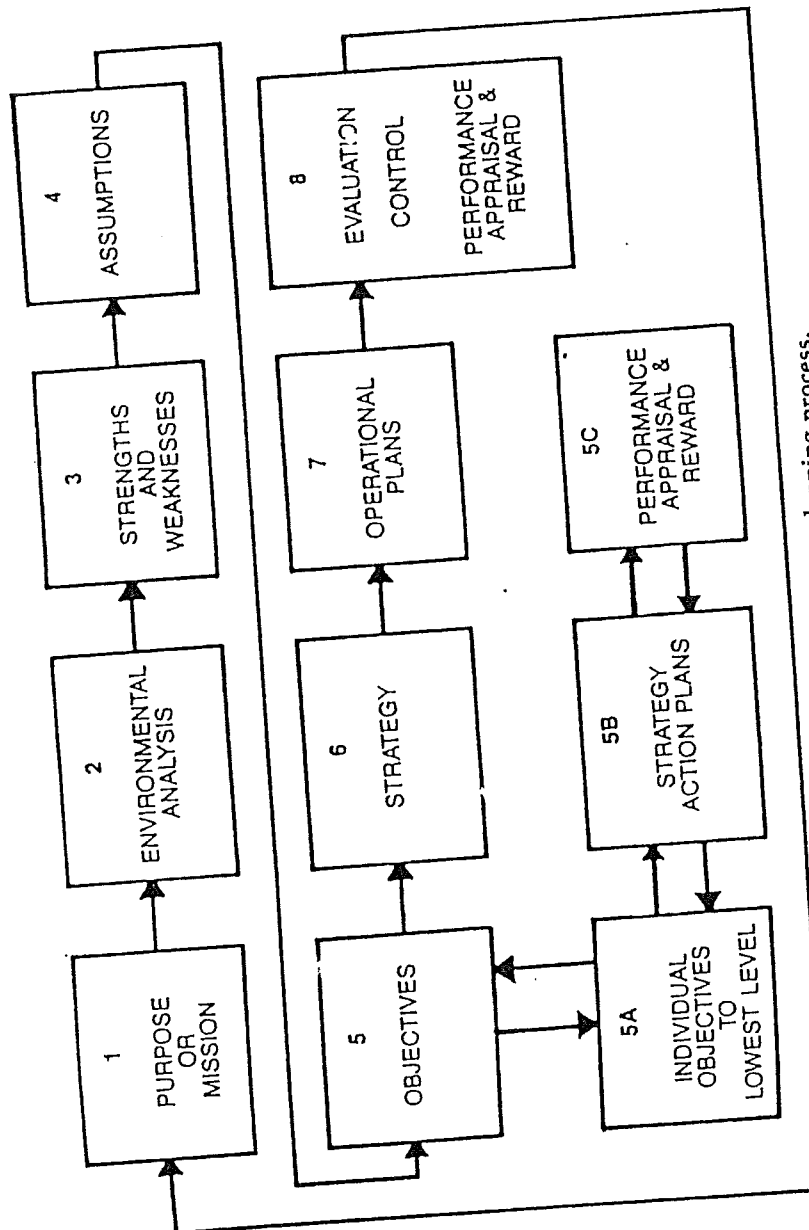


FIGURE 1. Strategic long-range planning process.

In athletics the SLRP&M concept has been equally successful in improving management practices. There are nine areas in which each athletic director and university president need to concern himself/herself. The following sections examine each of these areas in greater detail focusing on their applicability to intercollegiate athletic programs.

Defining the Purpose or Mission

A mission can be defined as a broad statement of the kind of organization that those directing it want it to be (Luck & Ferrell 1985). A statement of purpose or mission should be future focused as well as relating to historical factors such as tradition and the present status quo. It should contain the dream and vision of what the organization wants to be (Migliore, 1983, 1987, 1988). The Ohio State University Athletic Facilities Master Plan (Hellmuth, Obata, and Kassabaum, 1987, p. 1) provides an excellent example of this link between tradition and the future. In its opening statement the plan states:

The Ohio State University proudly claims one of the most distinguished athletic traditions in the United States. This Buckeye tradition has unified and thrilled generations of students, faculty and staff, alumni and fans; and the achievements, victories, and sportsmanship of Ohio State athletes have brought the University national attention and respect. However, maintaining this position of excellence in intercollegiate sports demands the very best from student-athletes and coaches. Facilities are needed that are commensurate with the skills and dedication of these outstanding student-athletes.

Intercollegiate athletic programs relate to a variety of publics that must be addressed in its day to day activities. Such groups include: student athletes, general student

population, campus administration, alumni, media, faculty/staff, conference and national governing bodies, local corporate and business community supporters, and in some cases, political entities who may influence direction due to control of funding. It would be highly impractical and perhaps impossible to develop a purpose statement that would satisfy the interests and concerns of all of these groups. The mission or purpose statement must be directed to those groups who have "core" concerns and relationships rather than those groups whose concerns and interests relate to the peripheral operations and benefits associated with the intercollegiate athletic program. The groups that must be addressed are those directly involved with the central mission of the education institution, the student population, and the faculty/staff and central administration.

Ottenbein College, a division III institution in Westerville, Ohio, has adopted the following mission statement:

At Otterbain College, athletics are supported not for the purpose of training professional athletes, or for advertising the College, but as an educational activity in which participants may learn valuable lessons concerning sportsmanship, and the attainment and maintenance of a superior level of mental and physical health during the collegiate years and beyond (Yoest, 1983, p. 1).

In intercollegiate athletic programs at all levels, there exists certain implied purposes as well as the concerns for student growth and development as illustrated previously. For example, it may be implied that certain programs within the athletic department are expected to generate a profit, while others are expected to "break even" or operate within a given fiscal framework with regard to travel and other areas of expense. It is essential that those individuals concerned with each of these sports have an understanding of not only the general purpose and mission but also the implied purposes as well.

Purpose statements may also lead to decisions on whether or not to drop or add sports. If the purpose is to provide a variety of opportunities for student involvement and participation a sport may be retained, even if it operates at a deficit. If the sport must be justified solely on a profit loss statement, it may be dropped from the program.

Monitoring the Environment

According to Drucker (1954) "decisions that are really important are strategic ... they involve finding out what the situation is" It is vital that the athletic administrator constantly assess the environment in which his/her program is located and in which its program must function to "determine what the situation is." This assessment should include factors that may affect the programs ability to fulfill its mission and purposes. In many cases this process involves construction of a market analysis of the current marketplace (Smith and Cavusgil, 1984; Sutton, 1987). The growing impact of noneconomic factors, the acceleration of economic and social change caused by new technologies, the intensification of governmental influence upon the economy, the emergence of new political and social powers, a deep alteration in the demographic structure as well as in educational standards are clear signs of the fact that growing markets cannot be considered in isolation (Reinhardt, 1984). In deciding about courses of action, commitments of time, or the use of resources, certain internal and external environmental factors from a variety of sources will impact upon the athletic decision maker (Olson, Hirsch, Brietenbach and Saunders, 1987).

The following list contains some factors that merit attention and regular monitoring by the athletic administrator:

- NCAA legislation

- leadership & direction of college/university leadership
- economic and business indicators (local, regional and national)
- political interpretations and implications of tax deductible and nondeductible expenses
- conference policies and regulations
- availability of corporate sponsorship
- competition from other institutions (locally and within conference or league parameters)
- media influences and exposure
- recruiting with regard to geographic production areas and their proximity and relation to the recruiting school (if any)

The purpose of providing this list is to illustrate that an athletic administrators key responsibility in this process is managing change. The only effective way to manage change is to constantly monitor our environment (Migliore, 1983, 1987, 1988). By identifying and monitoring possible areas of change the administrator can best be in a position to take advantage of positive development or minimize the effects of negative factors. For example, if an athletic administrator is able to monitor financial factors that affect overall income such as attendance and contributions, he/she might be better able to implement cost containment practices or minimize the impact of a shortfall in revenues rather than drop a sport program to achieve the same result.

An environmental analysis may also include survey data regarding the institution's various publics. This data may include attendance records and patterns for intercollegiate sport programs, program/sport preferences, alumni support, business community support, general community support, and perceptions regarding program image and standing. This type of survey data can be inexpensively collected and analyzed and provide important information

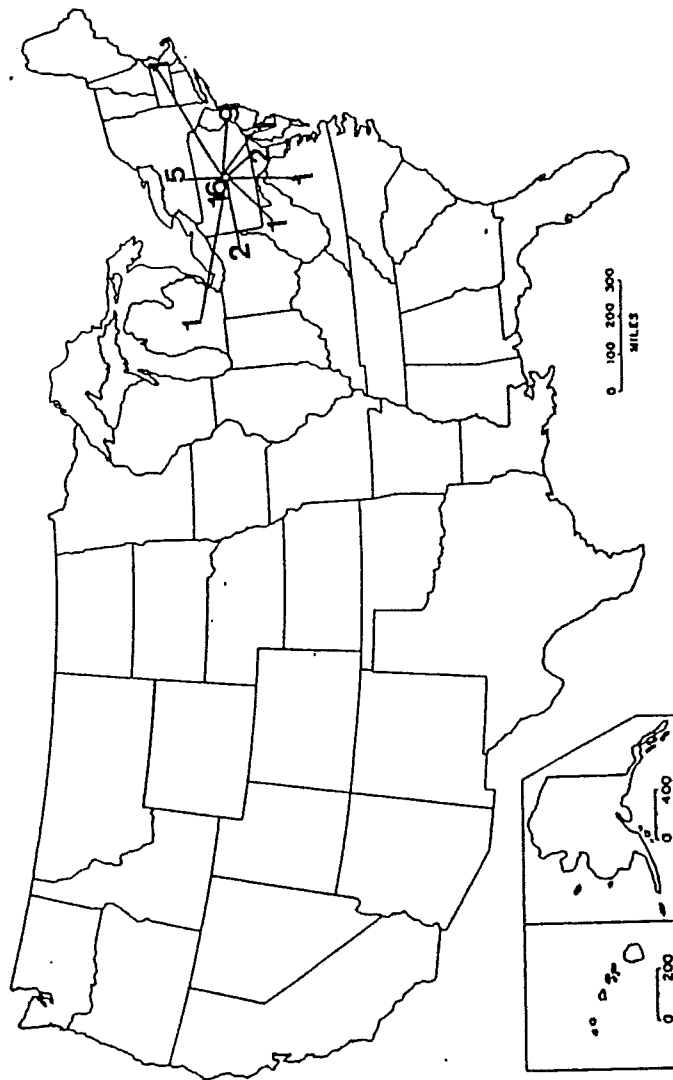


FIGURE 2. Penn State University Blue Chip Recruiting, 1972-1981 — 39 signees

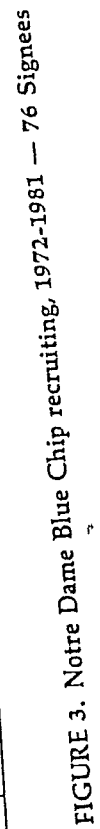


FIGURE 3. Notre Dame Blue Chip recruiting, 1972-1981 — 76 Signees

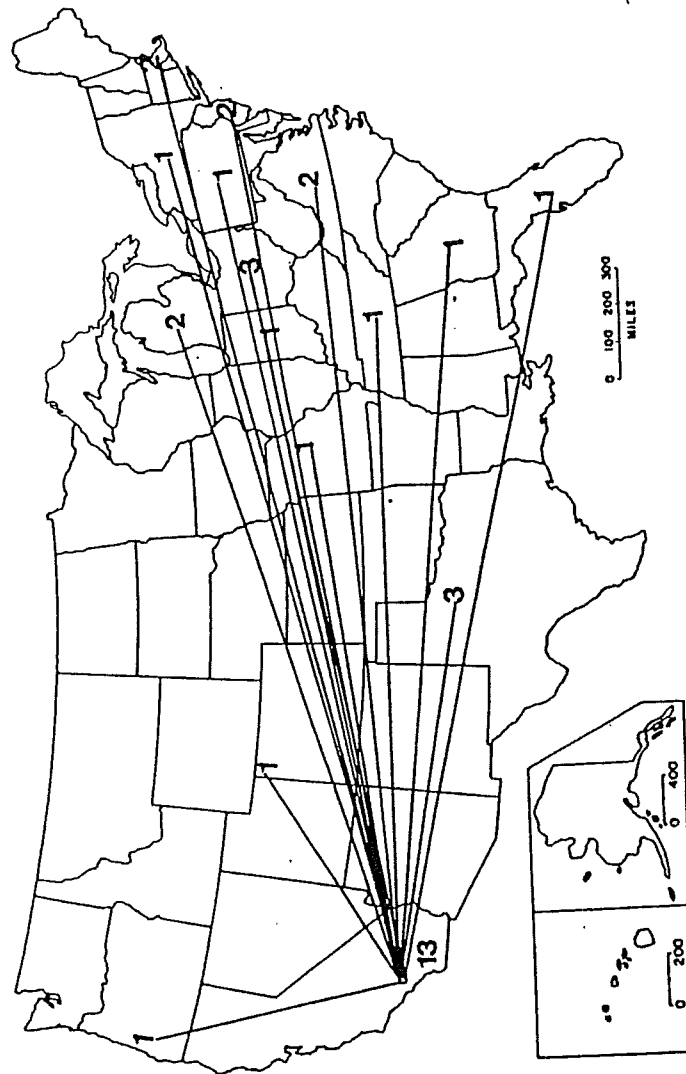


FIGURE 4. UCLA Blue Chip Recruiting, 1972-1981 — 36 Signees

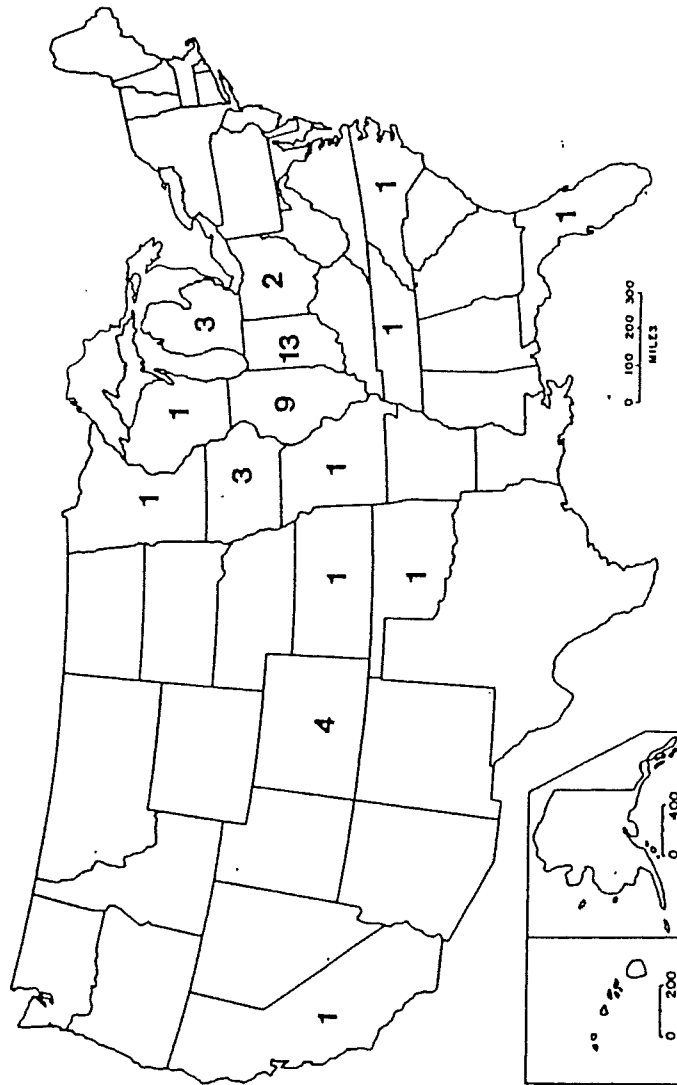


FIGURE 5. Migration of Illinois High School All-Americans, 1972-1981:
Population Sample, 43; Retained 21%; Migrated 79%

regarding the relationship between the athletic programs and the environment in which they function. An interesting area for examination with regard to environmental analysis would be recruiting patterns in intercollegiate athletics. Pioneered by John Rooney (1974, 1980), a sport geographer, this type of analysis could show trends in player production areas, areas of high player retention, and areas of high player migration. This information could then be translated into a recruiting methodology that would be much more cost effective in its operation than traditional practices in the area of recruiting. To examine the applicability of this concept let us examine the following illustrations. Figures 2, 3, and 4 illustrate the different approaches utilized in recruiting by Penn State, Notre Dame and UCLA while Figure 5 illustrates the migration patterns of Illinois High School All Americans (Sutton, 1983). When considering environmental factors that may influence the recruiting process, one must consider coaching changes and relationships, "price in place," probation, and television appearances. Any of these factors could drastically change the recruiting patterns of a given school.

Strength and Weakness Assessment

After identifying the purpose and considering the environment, the athletic administrator needs to assess the strengths and weaknesses of his/her program. A strengths/weaknesses analysis focuses on internal factors that might influence product success. Simply stated, strengths are attributes to be emphasized ... while weaknesses are problem areas to be resolved or at least controlled (Sutton, 1987). Some of the areas normally examined would include human resources, financial resources, facilities, attendance, equipment, and geographic factors relating to location, proximity, and the

demographics and psychographics of the local population. The athletic administrator must first identify those strengths which can be emphasized and utilized in the strategic planning process. Using The Ohio State University as an example, the recently completed Woody Hayes Indoor Sports Facility is a strength that can be utilized in recruiting, improving player performance and morale, and also in maintaining and building alumni pride. A weakness (which has subsequently been addressed in The Ohio State University Athletic Facilities Plan) is the limited amount of ice surface available for hockey competition, teaching and clinics and recreational skating. In most cases, identifying weaknesses is a painful process. In all cases objectivity must be maintained, which in some cases might necessitate utilizing a consultant or outside party to candidly pinpoint the limitations. Realistic objectives cannot be set without a realistic appraisal of strengths and weaknesses (Migliore, 1988).

Making Assumptions

This step involves some analysis of the future as well as the current state of affairs. While futurists believe that the future cannot be forecast, they believe that decision makers should consciously assess the uncertainties, then develop and work towards a vision of the future (Taylor, 1984).

Major assumptions need to be made about those areas over which the athletic administrator has little or absolutely no control (i.e., the external environment). This process can be initiated by extending some of the considerations examined in the environmental analysis.

The importance of assumption making in developing long-range plans for an intercollegiate athletic program can be better understood by considering the given constraints in an athletic program. For example, we can say for

the most part that it can be assumed that the football program at XYZ State will not be on probation and will share in all conference revenue. The assumption that the football program will remain stable and a major source of revenue enables the athletic director to set objectives and plan for other sports or events that are dependent upon income from the football program.

Other examples of making assumptions as they relate to athletic program administration are:

1. The coaching staff will remain intact after a given point in time.
2. Key players in revenue producing sports will retain their eligibility.
3. The top leadership in the university will remain constant as will the attitude in the central administration regarding athletics as an integral part of the university.
4. Revenues from radio and television will at least be equal to that of last year.
5. Congressional legislation regarding changing the tax deductible nature of gifts to athletics will not be enacted.
6. Attendance at football and basketball games will at least be the same as this past season.

The Ohio State University expresses the following sentiment as part of its Master Plan for Athletic Facilities: The Department of Athletics believes that participation in intercollegiate athletics to be a wholesome and positive experience for participants and spectators and therefore currently offers 31 intercollegiate varsity sports (Hellmuth, Obata, & Kassabaum, 1987). Assumptions at The Ohio State University are made on the premise that this situation will continue unless adversely affected by other factors in the environment.

Assumptions regarding corporate sponsorship and support of athletic programs are becoming more and more critical. Undergoing labor contracts and the implications of such contracts upon payments to the athletic program could prove crucial to program stability and longevity. For example, can it be assumed that a grocery chain enduring a prolonged work stoppage would be able to honor its contractual obligations to a collegiate athletic program? Should the contract with the athletic program have the same duration as the labor contracts? As the athletic programs throughout the country become more and more dependent upon corporate sponsorship and support assumptions regarding the longevity and uninterrupted flow of cash need to be examined carefully.

The significance of this step in the process is that it enables the administrator to identify important factors that are likely to remain constant. If there is a change that affects any one of these assumptions drastically, a reevaluation of the plan and appropriate revisions would be necessary. This assumption making stage also implies the values present in contingency planning, and provides the athletic administrator with some insight regarding the difficulties he/she might face if there is a significant change in the environment.

Objectives and Goals

In any organization, goals and objectives must be geared to gain results (Edginton & Williams, 1978). In the term management by objectives, management is the key—the use of objectives to help manage for results. Specifying objectives can only begin after the purpose of the organization has been defined, its environment analyzed, its strengths and weaknesses assessed, and the relevant assumptions made (Migliore, 1983, 1987, 1988).

Objectives must be clear, concise, written, measurable statements outlining what is to be accomplished within a

certain period of time. According to Drucker (1974, p. 99), "objectives are not fate; they are direction. They are not commands; they are commitments. They do not determine the future; they are means to mobilize the resources and energies of the business for the making of the future."

Broyles and Hay (1979, p. 27) state: "like a successful business whose goal is to produce a quality product and/or service to satisfy its customers; similarly the main goal of a successful athletic program is to produce a winning team to satisfy some of the entertainment needs of its fans." They further conclude that while this is the main goal of an athletic program that other organizational objectives related to winning merit consideration. Among these objectives are: making a profit, growth, developing, character in the athletics, improving the image of the athletic program, and to survive through adversity. While these objectives are certainly critical in some cases to various organizations, a strategic planning approach is the best course of action for the majority of all athletic programs regardless of division or classification.

Overall five-year objectives can be set in the following key result areas: academic, including GPA; graduation rate and progress toward a degree; attendance in each sport; victories and winning percentage; conference standing; press and media coverage and interest; revenue and budget performance; scheduling. Once key overall athletic department objectives are set for years one through five, then each sport sets their objectives. As departments develop and support activities, individuals can set their own objectives.

Migliore (1983, 1987, 1988) defines six types of objectives, and they are: routine, problem solving, team, innovative, personal, and budget performance. An examination of each type of objective and how it relates to intercollegiate athletic administration follows:

Routine objectives have to do with activities, jobs, or work assignments that *occur regularly and predictably*. For

example, the facility manager conducting inventories and examinations relating to game management and game operations functions that are utilized the day of every athletic contest staged in a particular facility.

Problem-solving objectives identify existing, recognized problem areas and state a time period for solution. For example, an athletic director might have the following objective: "Implement a computerized ticketing system prior to the initiation of season ticket sales in March, 1989."

Team objectives are those that need, accomplished with another member of the organizational team. For example, the compilation of a football media guide might be dependent upon the football staff and the sports information department and possibly the university public information department.

Innovative objectives look to the future, suggest a completion date, and usually improve an existing situation. For example, an athletic director might set as an objective of this type: "Devise a new methodology for performance evaluation for all coaches by July 1, 1989."

Personal objectives relate directly to the individual, and they consist of whatever that individual wishes to achieve during the year or other designated measures of time. An example relating to intercollegiate athletics could be the following objective by a member of the coaching staff: "I will attend Coach Smith's clinic regarding zone offenses, and will attempt to apply the material learned in my summer basketball camp."

Objectives for budget performance are quantitative, measurable, and usually set on a yearly time frame consistent with the organizational financial year. An example, relating to athletic fundraising might be stated as follows: The Wheels Club will solicit two vans for use by the golf and tennis teams for the 1989-90 seasons by June 1, 1989.

Objectives should also be determined on the basis of internal and external strategy (Thompson & Strickland,

1984). Internal strategic objectives should be concerned with desired organizational performance such as student-athlete academic performance and graduation rates. External strategic objectives should relate to the reputation and standing of the organization in the environment in which it competes and operates. For example, the firing of a football coach may be motivated by both internal and external factors, but may also have a negative effect upon the reputation and standing of the university in its environment.

Once formulated, goals and objectives are stated in various types of plans and directives such as master plans, budgets, blueprints, schedules and committee structures. It is essential to emphasize that these objectives are subject to negotiation and clarification by all parties involved before they are accepted and become part of the strategic planning process. They are not to be dictated or determined without input from all concerned parties.

Once objectives have been negotiated and agreed upon by all concerned parties they become a performance contract. This performance contract is a personal commitment by a particular department or section to accomplish the objectives and a commitment from the organization to provide the necessary resources and support to enable the department or section to achieve these objectives.

Strategies

Luck and Ferrell (1985, p. 2) define strategy as: "a scheme or principal idea through which an objective would be achieved." Strategies are, in sport related terminology, "game plans" and involve the methodology to be utilized to achieve organizational goals and objectives. Strategy is the "thinking" stage of the long range plan. Strategy considers resources, thrusts, priorities, and principles of accomplishing objectives (Broyles & Hay, 1979). For example, if a

goal specified in an intercollegiate athletic program was to increase season ticket sales in a particular sport, there are a number of strategies that could be utilized to achieve this particular objective. Some of these strategies to be considered include:

1. Development of a student intern program to assist sales staff in season ticket sales campaign.
2. Installation of a toll free ticket hot-line, designed for information dissemination and sales.
3. Development of a mini-season ticket allowing individuals who might not purchase an entire season ticket to share one.
4. Offering a "family" season ticket offering a discount for families of at least four members.

Each of these strategies has the capabilities of increasing season ticket sales, but all are significantly different and according to Longest (1978), there is a relationship between the strategy used and the perceived environment. The strategy determined to most appropriate for this particular example will be based upon the resources, administrative style, type of personnel available and other organizational factors. Various strategies relating to the stage of the sport product in the product life cycle will be developed. Such strategies may include price, promotion, place, personnel, pecuniary and market related (Broyles & Hay 1979). Strategy is also intricately related to timing. Using a particular strategy to position your product a certain way might be successful another time but possibly not at this particular time of choosing.

Another example of strategy relates to organization and may include living arrangements for athletes. For example, at Northeastern State University (Oklahoma) the philosophy of athletics is similar to all NAIA universities, which is: athletics are an integral part of the total education program and not a separate department. The athletes at

Northeastern do not live in athletic dormitories where they are segregated from other students. The goal of this approach, which is utilized at a number of NCAA Division I institutions including Notre Dame, is to try and simulate the environment athletes will be exposed to after graduation.

This strategy phase receives more attention in each subsequent year of the strategic planning process because the mission and objectives have been stated and accepted. The strategy changes as the internal and external environments dictate.

In implementing the selected strategies the administrator must keep in mind that the people who comprise the organization are the major limitation to successful implementation. At the same time these people are the vehicle through which the strategy will be successful. In other words, involving these people in the strategy selection and making sure that the strategy is understood will aid not only in its acceptance by those involved in implementation but in its eventual success.

Operational Plans: Long and Short Range

The operational plan, whether it involves long or short range methodology, is the action or doing stage. This facet of the plan involves accomplishing, implementing, gathering, funding advertising, and installing. Generally, a long range plan requires a five year operating plan for every phase of the business. In an intercollegiate athletic program such a plan would include sub-plans for ticketing, sports information, marketing/promotions, facility management and planning, business/finance office, athletic development, and a plan for each of the particular sports offered at the university. In smaller colleges this plan might also involve the physical education department, intramural and recreational sports. While this plan is a five

year plan, changes in the environment and other factors might necessitate the need for modifications and alterations from time to time. Each sub-unit must align itself with the mission and goals and objectives designated by the organization as a whole, and work to make the proper contributions to help insure organizational success.

A promotions department in an intercollegiate athletic program might have as part of its five year plan:

1. Maintain current level of staffing for three years and after that time add an assistant director of promotions for non-revenue sports.
2. After sponsorship agreements expires in 1990, negotiate new agreements on a three year basis rather than one year.
3. Move offices to new facility after the conclusion of the 1990 football season.

Long term operational planning has enabled the athletic program at The Ohio State University to reevaluate its broadcasting arrangements and scoreboard advertising philosophy to control both of these key revenue producing areas.

(Author's Note: To make objectives and strategy really work for you, it is suggested that each objective be organized according to the following format. Insure that everyone, including the athletes has had input into the objectives, particularly those objectives relating to academic standards. After the objectives have been agreed upon, various strategies can be developed to attain these objectives, and a system of control and followup is developed in the operational plan area(s).

Performance Appraisal

This stage involves an overall appraisal of the performance of the athletic department and its personnel

in terms of the accomplishment of goals and objectives. Some questions that need to be asked by the athletic administrator at this stage include: What are the effects of accomplishing or not accomplishing the objectives? Could the objectives be accomplished in a more efficient or economical manner? Have circumstances changed that necessitate changing objectives?

There are two other questions that also need answered at this stage. Will this appraisal be conducted annually or at regularly scheduled intervals throughout the year? Secondly, will there be a reward or other motivational factor associated with the performance appraisal?

Obviously, all of these questions need answered but at different stages of the strategic planning process. Frequency of the appraisal process and the negotiated or pre-agreed upon rewards system need to be determined in the initial stages of the strategic planning process. The remainder of the questions can be answered on an annual basis (summative) or during the process (formative) if the strategic planning process, depending upon organizational size and structure.

In terms of intercollegiate athletic programs the reward system, which in mainstream business can include performance bonuses, and sales incentives is quite limited, but should be included in hopes of greater productivity and in the interest of achieving organizational goals and objectives. A reward system in an intercollegiate athletic program might be comprised of travel and training opportunities instead of direct compensation. These rewards could take the form of travel and expenses for the staff member (and family) to attend post season tournaments or playoffs or to attend NCAA conferences, seminars etc. ... As travel funds are highly sought after and limited in amount this form of reward may be viewed favorably by those personnel involved in the process. Compensation and time off away from the job to attend

classes to further one's career and professional capacity may also be seen as an incentive. A third form of reward that may be effective in motivating performance in athletic departments is the allocation of future resources based upon departmental or unit performance. Those units or departments that achieve their objectives and maintain a high rate of productivity are given resources (budgetary, personnel, and equipment) as a reward for performance while those areas low in productivity and achievement of goals and objectives are given a lower priority and in some cases not funded. Recognition is another area that could be used as an affective reward in an intercollegiate athletic program. Titles, offices and furnishings, privileges, changes in responsibilities, and public acknowledgement can all be utilized as effective rewards in this setting.

Unique reward systems based upon graduation rates, academic performances such as GPA utilized by a few schools at this time could also be considered for widespread adoption in the near future. Similarly, some schools also have a bonus or incentive program for coaches to serve the entire term of their contracts. Conversely, penalizing athletic programs for low graduation rates or similar academic deficiencies by cutting the number of scholarships available or having coaches purchase the remainder of their contract before leaving may also be considered for adoption.

The key to this entire stage of the strategic planning process is communication. This communication must occur prior to the initiation of the process, during the process, and during the performance evaluation. The administrator and co-workers should meet at regular intervals to determine what results should be achieved and what will constitute acceptable performance (Jensen, 1988). Effectiveness of the entire strategic planning process is dependent not only upon understanding and acceptance but upon the communication process involved. This communication process must be interactive and not

merely directive to be effective. This communication system must contain a medium for feedback from parties at all levels of this process. For example, the ticket manager must be able to have a means of informing the athletic director of the status of sales and also how performance on the field is being translated into sales and demand. Similarly, the athletic director would wish to know from the marketing director why the successful performance of a team on the field is not being translated into demand or sales at the ticket office. This communication and feedback must occur during the season as well as prior to and following the season. Perhaps the season ticket goals were unrealistic or a scandal or crippling injury has affected sales, necessitating a revised goal in that particular area. Communication and feedback provide the organization with opportunities to remove obstacles to successful achievement of objectives during the process rather than creating hostility and defenses after failing to perform as previously agreed upon.

Feedback and the formal appraisal should have two stages, one oral and the other written. The oral interview stage should take place first. This stage provides an opportunity for face to face interaction and interpretation of the factors that have contributed to or detracted from performance. The written stage should be a formalization of the discussion and evaluation of the oral meeting. Many times a second oral meeting can be arranged if the written stage does not seem to correctly summarize the initial oral evaluation.

Everything learned and discovered during the evaluation and appraisal process should be analyzed carefully, with the recommendations arising from this analysis formulated into alternatives and suggestions for the affected areas of the strategic planning process. These alternatives after careful analysis should be converted to actions and objectives and implemented into the strategic planning process in hopes of improving performance over-

all or being able to achieve goals and objectives that for one reason or another were not able to be achieved.

Athletic directors and university presidents must take the framework presented here and develop their own SLRP&M plan consistent with their organizational size and mission. Once the plan has been developed and in place, it will take the diligence and interest of the management team to constantly monitor and adjust the initial plan to ensure its acceptance and success.

Appendix A

SAMPLE OF GOALS, STRATEGIES, AND OPERATIONAL PLANS RELATING TO ACADEMIC PERFORMANCE FOR ATHLETES

Objectives: Academic

- A. Improve the minimum GPA for all athletes (2.25 - 2.5)
- B. Increase the graduation rate to an average of 80% of all athletes receiving their degrees within a five year period.
- C. Increase class attendance to 85-90%

Strategies

- A. Recruit athletes interested in academic progress and whose academic records predict they will be successful in a college/university environment.
- B. Conduct aptitude tests and other assessments.
- C. Establish study tables and tutoring procedures as part of an ongoing academic counseling program.
- D. Establish a motivational system containing rewards and deterrents.
- E. Involve parents in the monitoring of academic progress.
- F. Involve high school counselors and faculty in the recruiting process.

Action Plans

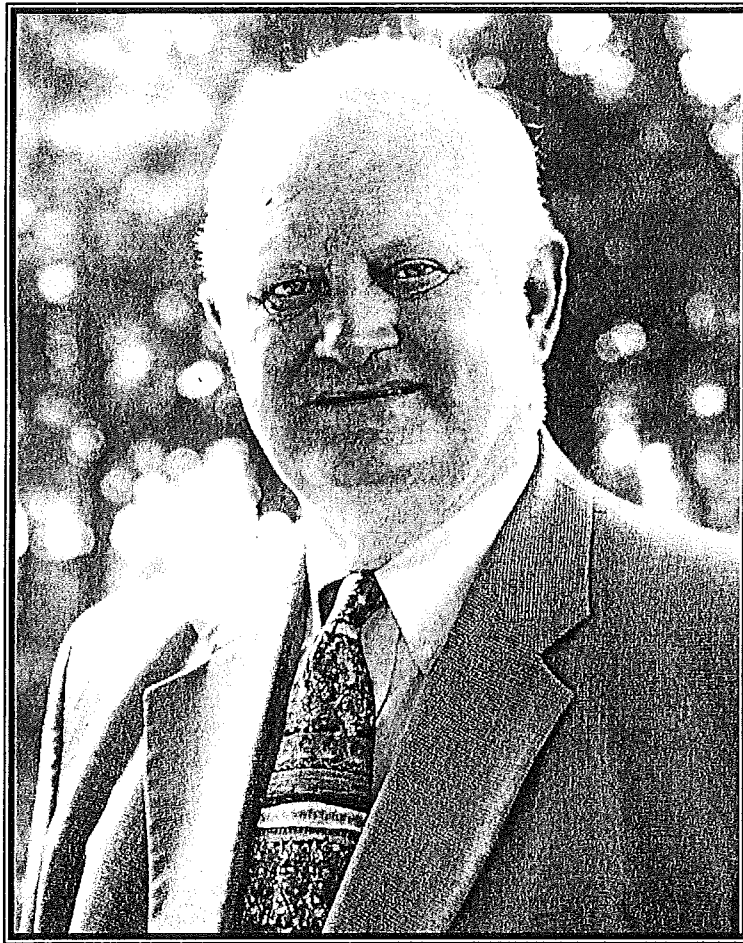
ACTION	RESPONSIBLE	STATUS
A. Research recruit's academic background	Coaching Staff & Academic Counseling Staff	Perennial
B. Preference testing to determine areas of interest	Academic Counseling Staff	Prior to Enrollment
C. Assess academic deficiencies	Academic Counseling Staff	Prior to Enrollment
D. Each Coaching Staff submits a team goal for GPA	Head Coach	Prior to beginning of classes
E. Establish study table requirements & policies	Academic Counseling Staff	Prior to beginning of classes
F. Gather attendance reports from instructors	Academic Counseling Staff	Weekly
G. Disciplinary procedures	A.D. & Coaching Staff	Weekly
H. Rewards & Recognition	A.D. & Coaching Staff	Close of Semester

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